

Salesforce Release Notes

Salesforce, Spring '23

Drive cost savings and boost efficiency with hundreds of new features



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SALESFORCE SPRING '23 RELEASE NOTES

The Spring '23 release helps you drive cost savings and boost efficiency with hundreds of innovations.

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 you and your users get ready for what's coming your way. We add resources throughout the release when they become available, so check back often.

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

Some features in Spring '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](#)

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

[Salesforce Overall](#)

Multi-factor authentication (MFA) auto-enablement for direct logins starts in Spring '23. Get more out of Salesforce Scheduler with enhancements to appointments. See more information related to your work with new configurations available for fields in Search Manager.

[Analytics](#)

Personalize Lightning reports with relative user filters. Report on Analytics subscription schedules, recipients, and attachments. In CRM Analytics, refresh templated apps with one click and navigate through dashboard pages with single-click interactions. Get Einstein Discovery predictions and recommendations in Revenue Intelligence. Give recipients more view options in Slack when you share assets using link unfurling.

[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](#)

Customer Data Platform, formerly Salesforce CDP, helps you connect and unify data across systems, power the connected and personalized marketing experiences that your customers expect, and analyze cross-channel engagement behavior. Extend the use of Customer Data Platform by creating and installing data kits and packages. Activate data profiles to target advertising across Google and Meta. As a partner, manage package versions with the tools you choose.

[Customization](#)

Save time by managing picklist values in bulk. Enhance your case and lead record pages with Dynamic Forms. See who can access records and why, and better protect your users' personal information with improvements to sharing.

[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

Use Search Manager to configure searchable fields by profile, including picklists, so users get relevant results. Einstein Discovery stories are now models. Optimize your Einstein Bots conversations with new ways to work with Goals. Get to know your customers with Einstein Conversation Mining, which uses your existing conversation transcripts to identify the top reasons your customers contact you and recommend some for automation.

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

Boost SEO for your Aura and Lightning Web Runtime sites with structured data. A wealth of new and updated components in Experience Builder help you make visits to your LWR sites even more enjoyable for your users. Adjust the margin around individual components on enhanced LWR sites for pixel-perfect pages. On your enhanced Mobile Publisher for Experience Cloud apps, delight your users with string properties that respond to their device screen size.

Field Service

Customize the mobile app to suit your business needs, and drive mobile worker productivity with Offline Mobile UI Extensibility and Lightning web components. Easily schedule multiday appointments, and then check schedule accuracy with Enhanced Scheduling and Optimization. Set attributes for your assets that let you know when it's time for a checkup or repair. Improve communication and fix rates by using mobile screen sharing between customers and technicians, and make the most of Visual Remote Assistant with reports to guide your mobile workers. No need to juggle apps—work more efficiently on iPad with split-screen functionality and an improved user experience.

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

Industries solutions are tailored to what you do, so you don't have to customize Salesforce on your own. Automotive Cloud provides a template for connecting with stakeholders through Experience Cloud sites. In Health Cloud, the Crisis Support Center Management app helps counselors provide mental and behavioral health support, and authorization requests get better. Loyalty Management has a new wizard that makes it easier to manage promotions. Manufacturing Cloud offers improved sales agreements and forecasting. Public Sector Solutions make it easier to capture referrals and provide financial aid to constituents. Consumer Goods Cloud has a new Analytics app. Net Zero Cloud supports more fuel types and improved carbon accounting. We've also enhanced the data processing engine, added decision tables to flows, and much more.

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

Now you have access to actionable recommendations to improve system processing in your business unit. Plus, review and correct errors that occur in your External Action integrations.

Mobile

In the Salesforce mobile app, enjoy an improved contacts experience and enable all mobile features in one place with a new Setup panel. Mobile Publisher for Experience Cloud now supports Lightning Web Runtime (LWR) sites (beta). Prime more objects for offline use with Briefcase Builder.

Revenue

Decrease subscription quantities, sell more easily in self-service channels, and include up to 100 lines per transaction. Note a Salesforce CPQ Plus and Salesforce Billing change to asset relationships.

Sales

Streamline sales management processes, automate reps' work, and close deals faster with new enhancements to core and productivity features. Revenue Intelligence users can try Account Discovery, a new feature with dashboards and Einstein Discovery models. Enablement teams can use Einstein Conversation Insights to verify if their programs are changing how reps talk to customers. Take the dynamic Activity Composer for a spin where everything is one click away. Determine compensation for reps based on their territory assignment dates. Design marker layers that get attention from more reps in Salesforce Maps.

Salesforce CMS

Define how long Salesforce CDN stores CMS content for a channel. Assign the new content author role to CMS workspace contributors. In enhanced CMS workspaces, use CMS Workflows to route your content to workspace contributors for review and approval. View content version history and restore previous versions of published content. Find content more easily with smart searches.

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.

Salesforce Starter

Salesforce Starter is the most efficient way to get started with Salesforce. With combined sales, service, and marketing tools, Salesforce Starter helps you find, win, and retain customers, all within one app. Salesforce Starter is simple and scalable, making it ideal if you're new to Salesforce or customer relationship management (CRM).

Security, Identity, and Privacy

Boost your security and compliance gains more conveniently. Enhanced Domains are deployed, and the first phase of multi-factor authentication (MFA) auto-enablement begins. Get more information-rich audit logs and monitoring solutions for file events and insecure login flows. Experience Cloud users can log in to third-party apps and reset passwords right from your sites. Enjoy more Security Center data visualization options with CRM Analytics. And use Privacy Center to extend consent preference options to customer subscription communications.

Service

Explore new Service Cloud features that help you and your team deliver efficient, high-quality service. Share links, questions with options, appointment time slots, post-conversation surveys, and more with messaging components, which are available in enhanced Facebook Messenger channels and Messaging for In-App and Web. Service Cloud Voice call handling time has been improved with the triggering of real-time actions based on intelligence signals detected during calls. Einstein Conversation Mining harnesses the power of Einstein to save you from time-consuming transcript analysis. Send, receive, and view Slack messages from Lightning Experience with the Slack Conversations component. Send internal communications when an incident occurs with new broadcast alerts and broadcast Slack messages. Measure Knowledge ROI with out-of-the-box dashboards for CRM Analytics. Add a screen flow template to help agents find and link callers to leads, contacts, or employees. 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, Trailhead GO, and Salesforce Web3.

[Release Updates](#)

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

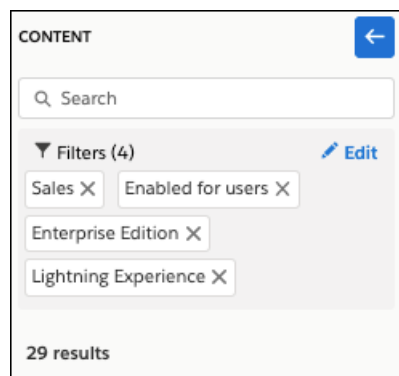
[Legal Documentation](#)

We made seasonal updates to Salesforce Legal Documents.

How to Use the Release Notes

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

- Your browser's settings determine the language that you see. To change the language, scroll to the bottom, click **Change Language**, and select a language.
- The release notes include details about new and modified features. For information on known issues, visit [Salesforce Known Issues](#).
- Use the table of contents search and filters to zero in on the news that matters the most.



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 #Spring23Feedback.
- **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](#).

 **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:

[Release Note Changes](#)

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

Release Note Changes

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

May 1, 2023

Metadata API

Removed the release note for the new `ERROR` value in the Status field on the existing FlowVersionStatus subtype of the Flow metadata type because the value wasn't released.

Removed: Track Changes Using Second-Generation Packages

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

April 17, 2023

Create Custom Property Editors and Property Types for Lightning Web Components in LWR Sites (Developer Preview)

Changed availability from Enabled for Users to Enabled for Administrators/Developers.

Metadata API

Added a release note about the MarketSegmentDefinition metadata type.

Get Ready for Backup and Restore Service Updates

Added a release note about the Backup and Restore managed package service migration.

New and Changed Objects

Added release notes about the new FlowRecord, FlowRecordElement, and FlowRecordVersion objects.

Receive Change Event Notifications for More Objects

Added a release note about receiving change event notifications for the FlowRecordVersion object.

April 10, 2023

New and Changed Public Sector Solutions Metadata Types

Announced the release note to list the new industry settings for Public Sector Solution Cloud.

Data Mask

Added a new Data Mask section with updates for faster job processing times and a change to unique field masking.

Fetch Data Using the GraphQL Wire Adapter (Pilot)

Updated the example to remove `this.errors` from the `data` response. Added a note that the GraphQL wire adapter uses `errors` instead of `error`, unlike the other LWC wire adapters.

Other Changes in the Salesforce Authenticator Mobile App

Updated this announcement to include several new requirements for Salesforce Authenticator.

Write SQL Queries in Multiple Workspaces Using Query Workspaces

Added a release note on Query Workspaces. Query workspace is a new tool that lets users write, execute, and save SQL queries into multiple workspaces.

Track More AWS Cost and Usage Metrics with Service Cloud Voice

Added to the release note that the Usage Quantity and Usage Unit fields have replaced the Telephony Minute field.

Removed: Select Who Has Access When Creating a Sandbox

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

April 3, 2023

Metadata API

Added several entries for updates to BotVersion and BotTemplate metadata types.

Fewer Permissions Required to Manage Your Contact Center

Added the name of the new IAM role for Service Cloud Voice with Partner Telephony from Amazon Connect.

Preview Estimated Wait Times Before Transferring Calls

Added how Salesforce calculates estimated wait times and in which telephony models the feature is automatically turned on.

Assess Your Readiness and Return on Investment for Einstein Conversation Insights

Added a release note for the Einstein Conversation Insights Assessor.

Salesforce Starter

Salesforce Easy is now Salesforce Starter, available with the Starter Edition. This change is a name change only.

Discover Additional CRUD Activity with AppExchange App Analytics UnassociatedCRUD log_record_type

Corrected the UnassociatedCRUD log_record_type value.

Publish Tableau Content to CRM Analytics (Beta)

Announced Tableau Views for Tableau Cloud and Tableau Server content in CRM Analytics (Beta).

Create Tooltips for Repeater Widgets Analytics (Beta)

Updated the release note to list the availability of tooltips for bullet and gauge chart widgets in a repeater widget.

Change Knowledge Record Types for Translated Articles

Clarified that this feature applies to record types for translations of primary articles only.

Restrict Emails Sent from the Guest User (Release Update)

Corrected the enforcement time line of the release update. The update is enforced with the Summer '23 release.

Generate a CDP Report with the Disclosure and Compliance Hub Template

Added a release note announcing the Net Zero Cloud Disclosures for CDP Standards package.

New and Changed Intelligent Document Reader Metadata Types

Added a release note to announce the new IndustriesEinsteinFeatureSettings metadata setting.

Improve Resource Utilization and Scheduling Quality by Sliding Service Appointments with Dependencies

Added a release note for sliding service appointments with dependencies.

Evaluate URL Redirection Setting in Health Check

Added a reference to the related help topic to provide more context.

March 20, 2023

Manage Your AppExchange Business in the Partner Console

Announced Partner Console launch.

Experience an Intuitive AppExchange Publishing Journey in the Listing Builder

Announced Listing Builder launch.

Complete the AppExchange Security Review Faster

Announced new security review wizard launch.

Get to Market Faster with a Streamlined Listing Approval Process

Announced new AppExchange listing approval process.

Monitor Your AppExchange Listing Performance from the Partner Console

Announced that AppExchange Marketplace Analytics is now available in the Partner Console.

Identify Accessible Solutions and Diverse-Owned Businesses on AppExchange

Announced new listing badges for identifying accessible solutions and diverse-owned businesses on AppExchange.

See Whether an AppExchange Solution Fits Your Budget Before You Install It

Announced the availability of Freemium and Paid Add-on Required pricing models for AppExchange solutions.

Removed: Search B2B Stores with Automatic SKU Search

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

Report on Draft Knowledge Articles in CRM Analytics

Announced that draft articles in CRM Analytics are now available to report on.

Optimize Bot Performance with Goals Enhancements

Added more information about the migration of bot goals from invocable actions.

Track Enrollee Count in Advanced Therapies in More Detail

Updated the language to clarify that the release note is targeted towards admins.

Other Changes in the Salesforce Authenticator Mobile App

Announced the new iOS minimum version requirements for the Salesforce Authenticator mobile app.

Increase Case Resolution with Einstein Search Answers (Pilot)

Updated the "How" section to align with the current enablement process.

Dynamically Pass Bind Variables to a SOQL Query

Updated the sample code and clarified the scope of the bind variable.

Removed: LWR Sites Support Toast Notifications in Custom Lightning Web Components

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

Flow and Process Run-Time Changes in API Version 57.0

Updated language to clarify the changes to flow element execution limits.

March 13, 2023

Marketplace for Salesforce Commerce

Added a release note announcing the integration of Marketplace to Salesforce Commerce.

Get Enhanced Messaging for WhatsApp (Generally Available)

Added a release note announcing Enhanced Messaging for WhatsApp in Service Cloud.

Connect to External Systems with Integrations Built for Scale

Added a release note announcing the Data Consumption Framework for Industries.

Connect Enhanced Bots to WhatsApp (Generally Available)

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

Get Pipeline Inspection in Enterprise Edition Without an Add-On License

Added a release note announcing the inclusion of Pipeline Inspection in Enterprise Edition.

Personalize Your Data with Related Attributes (Generally Available)

Added a release note announcing related attributes is now GA for activations in Data Cloud.

Net Zero Cloud Disclosures for GRI Standards Package

Added a release note announcing the Net Zero Cloud Disclosures for GRI Standards package.

Improve Component Caching in Aura Sites in Sandboxes

Added a release note announcing a new component caching mechanism for Experience Cloud Aura sites in sandboxes.

March 6, 2023**Preserve an Email's HTML Style in a Case Feed**

Added a release note about how emails in the case feed appear in plain text when collapsed and in HTML when expanded.

Reverse Fees for Clients Using Fee Reversal Service Process

Announcing the Fee Reversal service process for Financial Services Cloud

Get Your Account App Renewal Notifications

A new contract renewal notification has been added to the Your Account app.

Give Billing Contacts Your Account App Access

The ability to grant or update billing contacts' access to the Your Account app is now available.

View and Manage Quotes Using the Your Account App

New Pending and Completed Quotes tabs in the contract details page help with contract management in the Your Account app.

Metadata API

Added a new enum to the FlowActionCall metadata subtype of the Flow metadata type for Service Cloud.

Track Changes Using Second-Generation Packages

Added a note about the availability of second-generation packaging feature only for Salesforce ISV partners.

Use the MobilePush Contact Point for Your Activation

Announced the new MobilePush contact point for an activation in Data Cloud.

Increase Productivity with an Improved Softphone

We removed inserting the plus button (+) by pressing and holding 0, auto-focus on the Phone Number field on the Voice Call tab, and the call controls screenshot.

New and Changed Objects

We removed entries about new fields being added to the CommSubscriptionConsent, CommSubscriptionChannelType, and ContactPointConsent objects, because the fields were removed from the Spring '23 release. We'll let you know when they're ready to be used.

Improved Render Time for Lightning Web Components

We made a correction to sample code.

Assign the New Salesforce Integration User License to Grant API Only Access

We introduced the Salesforce Integration user license, which grants access to data and features via API only.

Restrict Emails Sent from the Guest User (Release Update)

Added a release update about restricting the use of guest user email addresses as return addresses for emails sent from Salesforce.

Metadata API

Added info about the new UserAccessPolicy metadata type.

Tooling API New and Changed Objects

Added info about the new UserAccessPolicy, UserAccessPolicyAction, and UserAccessPolicyFilter objects.

February 27, 2023**Changed Objects**

Added that up to 20 custom fields can be configured in each of the EngagementAttendee, EngagementInteraction, and EngagementTopic objects.

Sales Cloud Einstein

We added a See Also link to from the Sales Cloud Einstein to the Einstein section of the release note.

Do More with Enhanced Contacts (Beta)

We removed references to a feature no longer available in Enhanced Contacts (beta).

Internal and External Simulation Views Renamed Detailed and Concise Views

We added a release note to announce changes to the names of simulation views available in Expression Set Builder.

New Data Processing Engine Metadata Types

Added a release note announcing the new BatchCalcJobCustomNode metadata subtype.

Stay Organized by Adding Reports and Dashboards to Collections (Beta)

Clarified a statement that the feature is available in Operational Analytics and CRM Analytics.

Changed Connect REST API Response Bodies

Announced the new response body properties associated with Surveys.

Gain Access to Mobile Device Features with User Permissions

Added a release note announcing the new Mobile Publisher user permissions.

Integrated Care Management

Added a note to indicate that existing customers had to reprovision a license before they can use the new feature.

Restrict Anonymous Apex Access to Core Users

Clarified the users who are restricted access to Anonymous Apex.

Suppress Non-Global Properties with toString()

Added a release note about a new versioned implementation of `toString()`.

February 20, 2023

New Invocable Action in Manufacturing Cloud

Announced the new `importRecordsFromCsvFile` invocable action.

Write Powerful Queries in Compact Form 2.0 (Generally Available)

Updated the release note to clarify how to switch to Compact form 1.0.

Changed Connect REST API Request Bodies

Added a new property to Messaging Channel Input.

Benefit from Pub/Sub API Enhancements

Added a release notes entry about the Pub/Sub API subscription behavior after channel members or user permissions change.

Create Custom Property Editors and Property Types for Lightning Web Components in LWR Sites (Developer Preview)

Added a link to the developer preview documentation.

Get Improved Contact Matching for Video Calls

Updated the release note to note that Salesforce Inbox information can also be used to improve contact matching.

Run Identity Resolution Ruleset Jobs at Any Time

Added a release note announcing that you can now manually triggering a ruleset job to run at any time.

Minimize Service Disruptions with the Flow Automation Pack for Incident Management

Added a release notes entry about the Flow Automation Packs, which are available on AppExchange.

Include Encrypted Data in More Einstein Apps (Generally Available)

Added a release note about Einstein Classification apps that are now compatible with Shield Platform Encryption.

Block Access to Public Apex Constructor in Managed Package from @AuraEnabled Method (Release Update)

This release update has been canceled.

Customize Softphone Controls and Voice Extensions

Updated the release note to include a See Also link to Customize Call Controls and Voice Extensions.

Take Action More Quickly in the Dynamic Activity Composer

Updated the dynamic activity composer release note to clarify that the new composer doesn't work on the Case object and doesn't work with macros.

Recalculate Account Sharing Rules Faster

Updated the release note to reflect that this behavior is generally available and includes changes to implicit contact shares.

Require Granular Flow Permissions for Experience Cloud Guest Users (Release Update)

Postponed enforcement of this release update until later in Spring '23. Clarified how to test the new flow permissions for the Guest User profile before release update enforcement.

Estimate Your Company's Return on Investment for Einstein Forecasting

Added a release note about an update to the Sales Cloud Einstein Readiness Assessor, which you can now use to get an ROI assessment of Einstein Forecasting.

Customize the Field Service Mobile App with Mobile Offline Extensibility (Generally Available)

Added a link to the developer documentation.

Propose Future Meeting Times Easily in Outlook and Gmail Integrations

Corrected the phrase "including the current business day" to "excluding the current business day".

Optimize Bot Performance with Goals Enhancements

Added note announcing end of support for special characters in Einstein Bots goals.

February 13, 2023

Use New Multivalue Formulas in Your Recipes

Added a release note announcing new multivalue formulas for Data Prep recipes, including `ELEMENT_AT`, `ARRAY_DISTINCT`, `COLLECT_LIST`, and `COLLECT_SET`.

New and Changed Objects

The objects Salesforce Contract, Salesforce Invoice, and Salesforce Quote are no longer available.

Referral Name No Longer Supported on page 603

Added a release note announcing that the Name field on the Referral object is no longer compatible with Shield Platform Encryption.

Benefit from Pub/Sub API Enhancements

Added a release notes entry for port 443.

Let Users Optimize Their Sales Process and Automate Repetitive Tasks (Beta)

Added a note that the Automated Actions feature is beta.

Metadata API

Added a release note announcing the Error value on the Status field of the Flow metadata type.

User Interface API

Removed FeedItem from the list of supported objects. FeedItem was previously added incorrectly to the list.

Simplify Login to Salesforce Easy with Welcome.salesforce.com and the Environment Switcher

Added a release note announcing that welcome.salesforce.com and the Environment Switcher are available for some Salesforce Easy users.

Add a Flow Template for Find Contact Associated with Voice Call

Updated the release note to include a See Also link to Create a Screen Flow to Find and Link Callers to Records.

Stay in Lightning Experience When Working with Reports

Updated the release note to state that the Get Feedback button and the options to create or edit a Lightning report using Salesforce Classic have been removed.

Manage Automotive Dealers Effectively with Branch Management

Added a release note to announce the availability of this feature.

Assign Leads, Cases, and Opportunities Quickly to Automotive Dealers

Added a release note to announce the availability of this feature.

Streamline Automotive Service Operations with Service Process Studio

Added a release note to announce the availability of this feature.

Take Advantage of Enhancements to Sales Agreements and Advanced Account Forecasting

Added a release note to announce enhancements in Automotive Cloud to the existing features, Sales Agreements and Advanced Account Forecasting.

Refine Match Criteria with More Fuzzy Match Methods

Added a release note to announce new match methods available for Identity Resolution ruleset match rules.

Benefit from More Successful Metadata API Deployments

Added a release note about improvements to Metadata API deployments that are queued at the same time.

Metadata API

Added a release note for the `OAuthCdCrdtFlowEnable` field on the `OauthOidcSettings` metadata type.

February 6, 2023

Use Partitioned Domains in Hyperforce

Added a release note to announce the availability of this feature in some Hyperforce orgs.

Allow Partitioned Domains for Demo Orgs

Clarified that this feature is available only in orgs that qualify for partitioned domains.

New and Changed Objects

Added release notes for new updates to the existing `OrderAdjustmentGroup` object.

Added a release note for the new `QuoteHistory` and `QuoteLineItemHistory` associated objects.

Added release notes for the new `ActivationUserGroupId` field on the `SandboxInfo` object.

Added release notes for new updates to the existing `CallInfo`, `CapabilitiesResult`, and `Contact` objects.

Added release notes for three new fields on the `ActivePermSetLicenseMetric` object.

Removed the `DoesAddTravelTime` field from the `ApptBundleConfig` object.

Announced the new `HasSecurityKey` field on the `TwoFactorMethodsInfo` object.

Prepare for Changes to the Picklist Settings Page

Changed from a release update to a standard release note.

Get Improved Report Performance with On-Demand Inline Field Editing

Added release note for inline field editing button in reports.

Fetch Data Using the GraphQL Wire Adapter (Pilot)

Clarified that the GraphQL wire adapter is available in Enterprise, Performance, Unlimited, and Developer editions. Also added a statement that the `@category` metaschema directives are necessary for the pilot and that we expect to remove them in a future release.

Evaluate JavaScript for Aura Components in Lightning Web Security Console

Added release note about new feature for evaluating JavaScript for Aura components.

Use Lightning Web Security for Lightning Web Components (GA) and Aura Components (Beta)

Clarified when the LWS for Aura (beta) features are in effect in a Spring '23 production org.

Removed: Access Notifications from Within Mobile Publisher for Experience Cloud Enhanced LWR Sites (Beta)

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

Let Partner Community Users Use Experience Cloud to Perform Carbon Accounting

Added a release note to announce the availability of this feature.

Preview Estimated Wait Times Before Transferring Calls

Added a release note to announce the availability of this feature.

Optimize Bot Performance with Goals Enhancements

Added information about the time period for the Completed Goal Count column on the Goals page, which now shows goal performance for the last 180 days.

Focus Your View with More Dashboard Filters (Beta)

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

Identify Required Object Access Permissions Faster

Added a release note about changes available in version 1.123 of the Backup and Restore managed package.

Actionable Segmentation for Manufacturing Cloud (Beta)

Updated the release note to announce that the Actionable Segmentation feature is available as Beta Service only. Changed feature name from Manufacturing Sales Excellence components to Actionable Segmentation for Manufacturing Cloud.

Connect REST API for Actionable List Members (Beta)

Updated the release note to announce that the Connect REST API for Actionable List Members is available as Beta Service only.

Manufacturing for Service

Changed feature name from Service Excellence components for Manufacturing to Service Console components for Manufacturing Cloud.

Actionable Segmentation for Automotive (Beta)

Updated the release note to announce that the Actionable Segmentation feature is available as Beta Service only.

Use Custom Nodes in Data Processing Engine Definitions (Beta)

Updated the release note to announce that the custom node feature is available as Beta Service only.

Increase Scalability of Your DPE Definitions with Custom Node (Beta)

Added a release note about the new Aggregate by Member with Custom Node (Beta) Data Processing Engine definition for Rebate Management.

Search Globally with Increased Locale Support

Added a release note to announce that Commerce Search now supports up to 25 locales for a store.

February 2, 2023

Removed: See Object Names in Record Tabs

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

Updated the Tooling API Release Notes for Manufacturing Cloud.

Updated the [New and Changed Tooling Objects](#)

January 30, 2023

Use Encrypted Fields to Build Your Einstein Model (Generally Available)

Encryption support for training Reply Recommendations models is generally available.

Enable Content Sniffing Protection (Release Update)

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

View ARC Graphs Vertically

Updated example for Vertical Graphs in the Actionable Relationship Center.

New and Changed Objects

Added release notes to announce the BotId field, first available in version 52.0, and the AcwExtensionCount and AcwExtensionDuration fields, first available in version 55.0, on the AgentWork object.

Receive Change Event Notifications for More Objects

Change events are now available for PricebookEntry.

Escape Expression Language Evaluations in <script> and <style> Contexts in Visualforce Pages and Components (Release Update)

This release update has been canceled.

Export All Enablement Site Content with a Few Clicks

Added a release note announcing the option to export all content that's been published or archived on an enablement site.

Evaluate Criteria Based on Original Record Values in Process Builder (Release Update)

Updated the enforcement date to Summer '25.

Actionable Segmentation (Beta)

Updated the release note to announce that the Actionable Segmentation feature is available as Beta Service only.

New Invocable Action in Public Sector Solutions

Announced the new createBenefitDisbursement invocable action.

Locate Records in the Area to Get the Job Done

Added a link to the open source code in GitHub.

Upload and Annotate Images in the Field Service Mobile App

Added a link to the open source code in GitHub.

Reschedule Appointments from the Field

Added a link to the open source code in GitHub.

Better Performance for Embedded Analytics Dashboards

Updated the release note to announce that functionality is available in sandbox, but for production, it's available on a rolling basis.

Verify Your Email Address to Send Email Through Salesforce

Revised paid org SSO language.

Verify Ownership of Your Salesforce Domain for Email Verification

Revised user-level email address verification status check language.

Ease Priming Tasks with Native Display of Primed Records

Updated the short description with clearer wording.

Prevent Duplicate Cases with Lightning Threading in Email-To-Case

Updated the release note to add a link to the related release update's release note.

Add a Flow Template for Find Contact Associated with Voice Call

Updated the release note to add the prerequisite to turn on Match Callers to End User Records.

Build Custom Forecasts Pages That Work for Your Business

Updated the release note to add an image to illustrate the flexibility and benefit of adding other components to a forecasts page.

Removed: Report on Draft Knowledge Articles in CRM Analytics

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

Manage and Release Changes with DevOps Center (Generally Available)

DevOps Center has been validated in Government Cloud Plus as interoperable.

Receive Fewer Emails for Impending Sandbox Deletions

Corrected information regarding who receives inactive sandbox email notifications.

See Object Names in Record Tabs

Added release note.

New and Changed Objects

Announced the new asset attributes objects for Field Service.

New and Changed Objects

Announced the new field on the ApptBundleConfig object.

Encourage Users to Update to the Latest Mobile Publisher App Version

Added a release note about urging Mobile Publisher for Experience Cloud app users to update their app.

Preview Assets in Your Collections (Beta)

Added a new release note about previewing reports and dashboards in collections.

Stay Organized by Adding Reports and Dashboards to Collections (Beta)

Added a beta disclaimer.

Include Lightning Reports and Dashboards in Collections (Beta)

Added a beta disclaimer.

Optimize Bot Performance with Goals Enhancements

Removed an incorrect time frame (since last bot activation) for completed goal counts.

Customize the Field Service Mobile App with Mobile Offline Extensibility (Generally Available)

Changed the product name to Mobile Offline Extensibility.

Legal Documentation

Added release note.

January 23, 2023

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

Announced a new property on the existing OCR Target Object Mappings response.

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

Announced a new property on the existing OCR Target Object Mappings response.

New and Changed Objects

Added release note for new object AiModelLanguage.

Removed: Minimize Service Disruptions with the Flow Automation Pack for Incident Management

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

Enhance Your Dynamic Forms-Enabled Record Pages with Custom Address Fields

Added release note for custom address support in Dynamic Forms.

Call Transcripts Hide Personal Information

Updated topic to clarify that personal information is hidden from transcripts only.

Migrate Conditional Formatting Assets

Added See Also to Help document about implementing migration between orgs.

Use Encrypted Fields to Build Your Einstein Model (Generally Available)

Added release note for Case Classification encrypted field support.

Apex: New and Changed Items

Added release note for a new namespace, RichMessaging.

Search for an Individual in a Flow (Beta)

Added the beta tag to this release note.

Fetch Data Using the GraphQL Wire Adapter (Pilot)

Updated release note to call out that Lightning Web Security must be enabled before using the GraphQL wire adapter.

Apply and Automate Mass Access with User Access Policies (Beta)

Updated instructions on how to sign up for User Access Policies beta.

New and Changed Components for Change Sets

Added a release note for the Flow Test component.

Removed: Get Accessibility Changes to Lightning Design System Icons

This feature isn't quite ready, so we're removing it for now. We'll let you know when it's ready. We also removed mentions of this feature from other release notes.

Integrated Care Management

Added release notes for Integrated Care Management.

Health Cloud

Updated the description to mention Integrated Care Management.

Health Cloud Has New and Changed Objects

Added sections for Integrated Care Management and FHIR R4-Aligned Clinical Data Model.

Custom Measure Forecasts Offered in Professional and Enterprise Editions

Announced the availability of custom field forecasts in additional editions.

New and Changed Objects

Added a release note about the new `Type` field on the ActionCadence object.

Invocable Actions

Added a release note about the increase to the API limit for Sales Engagement invocable actions from 20 to 200 records.

Verify Ownership of Your Salesforce Domain for Email Verification

Added clarification of how this change affects SSO users who own their domain.

January 16, 2023

Implement Trade Promotion Management Faster with MuleSoft Accelerator

Added a release note to announce the baseline data integration with MuleSoft Accelerator.

Account Engagement API: New and Changed Items

Removed a beta disclaimer that was added in error.

Prevent Access to Salesforce Web Classic for Lightning-Only Mobile Users

Added a release note to announce a change to Salesforce mobile app access via iOS phone and Android web browsers.

How Long Inbox Preview Renders Are Stored Is Changing

Added a release note to announce a change to how long email inbox preview renders are stored.

Analyze Bot Performance with New Standard Reports

Added a note about the missing Einstein Bot Reports Spring '23 folder for customers who are upgraded to Spring '23 before January 18, 2023, including action steps and workarounds.

Get information about billing schedules and about invoice batch run recovery procedures.

Added release notes for the new InvoiceBatchRunRecovery object and the updates to the existing InvoiceBatchRun object.

Let Reps Create Their Own Outreach Templates with Quick Cadences

Added a note about the need to check permissions assigned in cloned or custom permission sets created before Spring '23.

Metadata API

Added release notes for new Salesforce Flow fields and values that were introduced in earlier releases.

New and Changed Objects

Added release notes for new Salesforce Flow objects and fields that were introduced in earlier releases.

Customize the Field Service Mobile App with Mobile Offline Extensibility (Generally Available)

The first bullet in the release note was updated to clarify that users can create custom UIs with Lightning web components

Removed: Create Custom Notifications Enabled Across Delivery Channels

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

Removed: Send Notification Actions Now Support Desktop and Mobile Notification Types

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

Removed: Add a Notifications Component to Your LWR Site (Beta)

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

Get Ready for the Release

Added Spring '23 resources.

January 9, 2023

Actionable Segmentation (Beta)

Added a release note to announce the new Actionable Segmentation feature for Financial Services Cloud.

Other Salesforce Products and Services

Salesforce Help Enhancements have been removed for Spring and there will be more updates in future releases.

The Default for Some Account Engagement Settings Is Changing

Added a sentence to clarify that these defaults can be changed after some confusion seen in blogs covering the release.

Automotive Cloud

Added three release notes to announce the changed Engagement Interaction objects, changed Action Launcher metadata type, and the new Actionable List Connect API in Automotive Cloud.

New and Changed Objects

Added a release note to announce the OmniSupervisorConfigAction object that was first available in version 56.0.

Service Process Studio

Added a release note to announce the new Service Process Studio feature.

Actionable Segmentation (Beta)

Updated the release note to announce the Actionable Segmentation objects.

Account Engagement API: New and Changed Items

Added the default beta disclaimer to the new Bulk Actions update per Legal's request..

New objects for Subscription Management, B2B Commerce, and B2C Commerce clouds

Added release notes for the new standard objects PriceAdjustmentGroupShape, PriceAdjustmentItemShape, ProductRelatedComponent, ProductRelationshipType, SalesTransactionItemShape, SalesTransactionShape, and SalesTrxnItemRelationShape.

Calculate the price of amended items or used subscription items

Added release notes for new fields in the existing SalesTransactionItem object interface.

January 2, 2023

New and Changed Standard Platform Events

Added a new release note to announce the new `Place Order Failed` value in the existing `ExceptionType` field on `ProcessExceptionEvent`.

Meet Corporate Policy by Sending Case-Related Emails with Your Servers

Updated the release note to remove Essentials as a supported edition.

Easily Implement Feedback Management for Service Cloud

Added a release note to announce the availability of the Feedback Management for Service Cloud Implementation Guide.

Interaction Summaries

Added a release note to announce the new Einstein Activity Capture for Financial Services Cloud feature and other enhancements for Interaction Summaries.

Discovery Framework

Added a release note to announce the enhancements to the Discovery Framework feature.

Integration Definitions

Added a release note to announce the new Integration Definitions feature to quickly set up integrations with different external endpoints.

Business Rules Engine Release Update

We removed the release note on cloning expression sets because the launch of this feature is delayed.

Apex Static Variables Are Reset Within a Transaction Between Groups of Platform Event–Triggered Flow Interviews

Added a release note about changes to the behavior of Apex static variables that are set by Apex code invoked by platform event–triggered flows and processes.

December 21, 2022

Salesforce Spring '23 Release Notes

Published preview release notes.

Get Ready for the Release

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

What's New This Release

- [Key Dates for the Spring '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.
- [Spring '23 Pre-release Signup](#). Sign up for a pre-release org to get early access to the new features.
- [Release Readiness Live](#). Register and make the most of the new features.
- [Release Demos](#). Get quick video overviews of what's coming this release.
- [Spring '23 Release Website](#). Check out the new features.
- [Spring '23 Release Highlights Module](#). Get the Spring '23 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. To see your maintenance dates, click **Instances** and your instance.
- [Sandbox Refresh Calculator](#). Plan if and when to refresh your sandboxes.
- [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 Spring '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

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

Multi-factor authentication (MFA) auto-enablement for direct logins starts in Spring '23. Get more out of Salesforce Scheduler with enhancements to appointments. See more information related to your work with new configurations available for fields in Search Manager.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
General Enhancements				
Be Ready for MFA: Auto-Enablement Starts with Spring '23			✓	
Major Release Notification Emails Are Streamlined		✓		
Limit the Maximum Number of Loaded Lightning Console Tabs in a Session			✓	
Keep Working with Tab-Focused Dialogs (Release Update)			✓	
Log In with More Domain Formats	✓			
View and Manage Quotes Using the Your Account App				
Get Your Account App Renewal Notifications				
Give Billing Contacts Your Account App Access	✓			
Salesforce Scheduler				
Schedule Video Appointments with Amazon Chime			✓	
View Past and Upcoming Appointments Using My Appointments Calendar			✓	
Use Omni-Channel Service Resources in Salesforce Scheduler			✓	
Other Changes to Salesforce Scheduler			✓	
Einstein Search				
Configure Searchable Fields for Each User Profile (Beta)		✓		
Quickly Configure Searchable Picklists (Beta)		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Increase Case Resolution with Einstein Search Answers (Pilot)		✓		
Strengthen Your Search Productivity with the Einstein Search Learning Map		✓		

Analytics

Personalize Lightning reports with relative user filters. Report on Analytics subscription schedules, recipients, and attachments. In CRM Analytics, refresh templated apps with one click and navigate through dashboard pages with single-click interactions. Get Einstein Discovery predictions and recommendations in Revenue Intelligence. Give recipients more view options in Slack when you share assets using link unfurling.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Reports and Dashboards				
Create Personalized Report Filters			✓	
Stay Informed on Dashboard and Report Subscriptions		✓		
Subscribe to More Reports and Dashboards			✓	
Stay in Lightning Experience When Working with Reports			✓	
Get Improved Report Performance with On-Demand Inline Field Editing	✓			
Stay Organized by Adding Reports and Dashboards to Collections (Beta)			✓	
Preview Assets in Your Collections (Beta)			✓	
Access Optimal Views on Mobile with Enhanced Reports (Generally Available)	✓			
Filter Report Types by Objects or Fields (Generally Available)	✓			
Enhance Lightning Dashboards with Text and Graphics (Beta)				✓
CRM Analytics				
Data Integration				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Connect Security Center and CRM Analytics with Data Sync	✓			
Use New Multivalue Formulas in Your Recipes				
Prebuilt Templates and Apps				
Refresh Templated Analytics App Data with One Click				✓
Get Automated App Upgrades	✓			
Improve Your Team Members' Efficiency		✓		
Customize Dashboards and Manage Revenue Better			✓	
App Building				
Move Through Dashboards with a Single Click (Generally Available)				✓
Write Powerful Queries in Compact Form 2.0 (Generally Available)	✓			
Publish Tableau Content to CRM Analytics (Beta)				
Better Performance for Embedded Analytics Dashboards				✓
Edit Queries That Contain Interactions	✓			
Use the Input Widget in More Ways	✓			
Migrate Conditional Formatting Assets	✓			
Improve Dashboard Accessibility with High-Contrast Colors	✓			
Highlight Important Content in Repeater Widgets with Conditional Formatting	✓			
Create Tooltips for Repeater Widgets	✓			
Format Numbers in Charts to Your Liking	✓			
Sort Pivot Tables by a Measure (Generally Available)	✓			
View Subtotals in Pivot Tables (Generally Available)	✓			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Save and Share Single-Click Customer Data Platform Explorations	✓			
Power Queries on Calculated Insights with Fine-Tuned Metadata	✓			
Facet SOQL Queries on Related Salesforce Objects with Ease	✓			
Apply Powerful Formulas and Functions to Direct Data	✓			
Other Enhancements to CRM Analytics App Building	✓			
Einstein Discovery				
Hello Predictive Models, Farewell Stories	✓			
Get Einstein Discovery in Revenue Intelligence	✓			
Improve Recommendations with Decision Optimization (Pilot)				✓
See Estimated Model Run Time (Generally Available)		✓		
Make Einstein Easier to Understand		✓		
Get Fine-Grain Model Performance on Specific Values (Generally Available)		✓		
Queue Models for Einstein to Run		✓		
Predict with Live Google BigQuery Data		✓		
Einstein Predictions Component Has a New Look	✓			
Turn Big Data into Predictions Faster (Generally Available)		✓		
Analytics for Everyone				
Include Lightning Reports and Dashboards in Collections (Beta)			✓	
Pin and Hide Collections	✓			
Browse Collections with Asset Previews	✓			
Do More with Analytics Links in Slack	✓			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Get More Context in Slack Notifications	✓			

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				
Create a B2B Store Built on Lightning Web Runtime	✓			
Improve SEO with URL Slugs and Redirects (Pilot)				✓
Use Dynamic Redirect Rules in LWR Commerce Stores (Pilot)				✓
Promotions				
Create Progressive Tiers for a Promotion	✓			
Bring on More BOGO Deals	✓			
Automatically Apply Category Promotions to Variants	✓			
Show Related Products on One Product Detail Page	✓			
Search				
Bring Products to Customers with AI-Powered Search			✓	
Rebuild the Search Index Faster with Partial Reindexing			✓	
Search Globally with Increased Locale Support			✓	
Commerce Data Import is Now Asynchronous	✓			
Global Sales				
Configure Stores to Use Multiple Currencies	✓			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Assign a Country to a B2B Store	✓			
Configure Stores with Multiple Ship-to Countries	✓			
Configure Tax Rates by State or Province	✓			
Manage Addresses in B2B and B2C Stores	✓			
Checkout				
Create a B2B Checkout Directly in Experience Builder	✓			
Show the Default Shipping Address for Speedier Checkout	✓			
Check Out Using Account Switcher	✓			
Configure Inventory and Pricing Integrations for Checkout	✓			
Orders Are Processed Asynchronously for Improved Performance	✓			
Upgrade Cart Components in Your B2C Store	✓			
Customize Components with Cart Data	✓			
Use the Nested Expressions Data Source in the Grid Component	✓			
Configure Menu Items with the User Profile Menu Component	✓			
Order Settings Are Now Configured Automatically	✓			
Use More Field Options for Customer Addresses	✓			
Programmatically Change a Web Store's Site Association		✓		
Confirm That Your Products Are Ready to Sell		✓		
Develop B2C Stores in Developer Edition Orgs	✓			
Omnichannel Inventory				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Self-Provision the Connection Between B2C Commerce and Omnichannel Inventory	✓			
Import More Inventory Records in Less Time	✓			
Gain More Visibility into Shared Group Reservation Counts	✓			
Salesforce Order Management				
Place Orders on Behalf of Customers Using UI Flows		✓		
Identify Whether an Order Summary Was Created on Behalf of a Customer		✓		
Track and Manage Packing for Online Orders		✓		
Charge Fees for Simple Returns and Cancellations		✓		
Automatically Update an Order Payment Summary When Canceling a Payment Authorization		✓		
Use Salesforce Payments with B2C Commerce Orders		✓		
Provision and Deactivate B2C Commerce Connections via Self-Service		✓		
Deactivate High-Scale Orders Without Disrupting Order Data		✓		
Find Useful Resources for Order Management Developers		✓		
Import Order Data from External Channels at High Scale (Developer Preview)		✓		
Get Payment Method Information for Each Order		✓		
Salesforce Payments				
Add Salesforce Payments to B2B Checkout			✓	
Marketplace for Salesforce Commerce				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Harmonize Third-Party Seller Categories and Prices	✓			
Export Third-Party Seller Prices into Salesforce Commerce	✓			
Split Sellers' Order	✓			
Add Marketplace and Sellers' Shipping Costs	✓			
Create Multiple Marketplaces	✓			
Let Shoppers Compare Seller Prices	✓			

Customer Data Platform

Customer Data Platform, formerly Salesforce CDP, helps you connect and unify data across systems, power the connected and personalized marketing experiences that your customers expect, and analyze cross-channel engagement behavior. Extend the use of Customer Data Platform by creating and installing data kits and packages. Activate data profiles to target advertising across Google and Meta. As a partner, manage package versions with the tools you choose.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Accelerated Queries for Tableau	✓			
Build and Share				
Chain Processes in a Sequence with Workflow Orchestration	✓			
Save Time by Updating an Existing Data Kit	✓			
Activate Segments for Google or Meta Advertising Platforms	✓			
Personalize Your Data with Related Attributes (Generally Available)	✓			
Use the MobilePush Contact Point for Your Activation	✓			
Retain Data After Deleting a Google Cloud Storage Data Stream	✓			
Refine Match Criteria with More Fuzzy Match Methods	✓			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Run Identity Resolution Ruleset Jobs at Any Time	✓			
Write SQL Queries in Multiple Workspaces Using Query Workspaces	✓			
Nest Operators for Related Attributes	✓			

Customization

Save time by managing picklist values in bulk. Enhance your case and lead record pages with Dynamic Forms. See who can access records and why, and better protect your users' personal information with improvements to sharing.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Fields				
Clean Up Inactive Picklist Values (Generally Available)		✓		
Bulk Manage Picklist Values (Generally Available)		✓		
Prepare for Changes to the Picklist Settings Page		✓		
Capture Inclusive Data with Gender Identity and Pronouns Fields			✓	
Lightning App Builder				
Enhance Case and Lead Record Pages with Dynamic Forms		✓		
Take Advantage of Dynamic Actions for Standard Objects (Generally Available)		✓		
Build Your Own Forecasts Pages in Lightning App Builder			✓	
Add Save Options to Accounts, Cases, and Leads with Dynamic Forms		✓		
See More Records in Dynamic Related Lists	✓			
Enhance Your Dynamic Forms-Enabled Record Pages with Custom Address Fields		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Pin Important Content on the Right Side of Record Pages		✓		
Access Information Easily on Object Record Pages with Screen Readers and Hover		✓		
Sharing				
Enable Stronger Protection for Your Users' Personal Information (Release Update)		✓		
Learn Who Can Access Records and Why		✓		
Recalculate Account Sharing Rules Faster				✓
Permissions				
Query Delegated Group Access via Tooling API		✓		
Choose the Permission Sets Display When Setting Field-Level Security (Beta)			✓	
Apply and Automate Mass Access with User Access Policies (Beta)		✓		
Globalization				
Update Outdated Country Names	✓			
Available Country List Was Changed			✓	
Enable ICU Locale Formats (Release Update)			✓	
Prepare for Locale Format Changes	✓			
Get Locale Names in Local Languages	✓			
Review Updated Label Translations	✓			
Enjoy More Custom Address Field Functionality		✓		
Prepare for the Japanese Katakana Style Change (Release Update)	✓			
Adopt New Currencies for Croatia and Sierra Leone	✓			
External Services				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Register More API Specs with Revised and Expanded Limits		✓		
Track External Services Limits		✓		
Specify Charset in the Header		✓		
Get External Data from a Web-Based Service into Flow Builder Without Code (Beta)		✓		
Connect Salesforce to MuleSoft with Fewer Clicks			✓	
Salesforce Connect				
Connect External Data Sources Managed via GraphQL from Salesforce (Pilot)				✓
Set Up Amazon DynamoDB External Data Sources with Fewer Clicks			✓	
Get Support for Amazon DynamoDB Data Sources in Global Search	✓			
AppExchange				
Identify Accessible Solutions and Diverse-Owned Businesses on AppExchange	✓			
See Whether an AppExchange Solution Fits Your Budget Before You Install It	✓			
General Setup				
Return Characters in a String in Reverse Order		✓		
Track Field History for Activities	✓			

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				
Use Lightning Web Security for Lightning Web Components (GA) and Aura Components (Beta)		✓		
Lightning Web Security Enablement for Orgs with No Custom Components		✓		
Evaluate JavaScript for Aura Components in Lightning Web Security Console		✓		
Fetch Data Using the GraphQL Wire Adapter (Pilot)		✓		
Query DOM Elements with Refs		✓		
Improved Render Time for Lightning Web Components		✓		
Enable Third-Party Integrations with Light DOM (Beta)		✓		
Build Components in Mixed Shadow Mode (Developer Preview)		✓		
Use Scoped Styles Only on Light DOM Components in Aura-Based Containers		✓		
Use the Improved Conditional Directives		✓		
View Debug Information for Your Wired Properties		✓		
Scoping in CSS Pseudo-Elements Is Fixed		✓		
Disable lwcRuntimeFlags to Improve Lightning Page Security		✓		
Use the UTAM Browser Extension to Identify Page Objects (Beta)		✓		
Generate UTAM Page Objects from HTML Files		✓		
Use Improved Linting for UTAM Page Objects		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Configure Code Completion for UTAM JSON Page Objects		✓		
Synchronize Component Data Without a Page Refresh Using RefreshView API (Beta)				✓
Extend Omni-Channel Softphone Capabilities for Service Cloud Voice				✓
Security Enhancements for CSRF Tokens for Lightning Apps (Release Update)			✓	
Block Access to Public Apex Constructor in Managed Package from @AuraEnabled Method (Release Update)		✓		
Visualforce				
Escape the Label Attribute of <apex:inputField> Elements to Prevent Cross-Site Scripting in Visualforce Pages (Release Update)		✓		
Enable JsonAccess Annotation Validation for the Visualforce JavaScript Remoting API (Release Update)		✓		
Escape Expression Language Evaluations in <script> and <style> Contexts in Visualforce Pages and Components (Release Update)		✓		
Validate Getter and Setter Access Modifier Enforcement During Visualforce Expression Language Parsing (Release Update)		✓		
Prevent Consecutive API Navigation Calls (Release Update)		✓		
Apex				
Secure Apex Code with User Mode Database Operations (Generally Available)		✓		
Find Which Apex Classes Implement an Interface (Generally Available)		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Use DataWeave in Apex to Enable Data Transformation to Different Formats (Beta)		✓		
Use the System.enqueueJob Method to Specify a Delay in Scheduling Queueable Jobs		✓		
Specify an Org-Wide Default Delay in Scheduling Queueable Jobs			✓	
Dynamically Pass Bind Variables to a SOQL Query		✓		
Discover the Source SObject of a DescribeFieldResult Instance		✓		
Run the SandboxPostCopy Script as Automated Process User		✓		
Enforce RFC 7230 Validation for Apex RestResponse Headers (Release Update)			✓	
Restrict Anonymous Apex Access to Core Users			✓	
Discover Enhanced Debug Logs in Nested Execution Contexts		✓		
Static Variables Are Reset Within a Transaction Between Groups of Platform Event–Triggered Flow Interviews	✓			
Suppress Non-Global Properties with toString()			✓	
API				
Assign the New Salesforce Integration User License to Grant API Only Access		✓		
Choose Any Name for a Global Value Set		✓		
Salesforce Platform API Versions 21.0 through 30.0 Retirement (Release Update)			✓	
Benefit from More Successful Metadata API Deployments	✓			
Einstein Vision				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Quickly Extract and Map Handwritten Text to a Structured Document Using Einstein OCR	✓			
Packaging				
Specify a Default Language for Unlocked and Second-Generation Managed Packages		✓		
Limit User Profile Access for Packages Installed via Metadata API		✓		
Get Your Packages Ready for Enhanced Domains		✓		
DevOps Center (Generally Available)				
Manage and Release Changes with DevOps Center (Generally Available)			✓	
What's New in DevOps Center?			✓	
Development Environments				
Quickly Clone Partial and Full Sandboxes (Generally Available) (not immediately available)			✓	
Receive Fewer Emails for Impending Sandbox Deletions (not immediately available)			✓	
Platform Development Tools				
Develop Platform Apps with Ease		✓		
Monitor and Analyze System Performance with Scale Center (Beta)			✓	
Salesforce Functions				
Salesforce Functions Updates				✓
AppExchange Partners				
Manage Your AppExchange Business in the Partner Console		✓		
Experience an Intuitive AppExchange Publishing Journey in the Listing Builder		✓		
Complete the AppExchange Security Review Faster		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Get to Market Faster with a Streamlined Listing Approval Process		✓		
Monitor Your AppExchange Listing Performance from the Partner Console		✓		
Analyze CRM Analytics Recipe Usage with AppExchange App Analytics				✓
Explore Query Usage with AppExchange App Analytics Package Usage Log Operation Fields				✓
Retrieve Clean Read Counts with AppExchange App Analytics Package Usage Summaries				✓
Discover Additional CRUD Activity with AppExchange App Analytics UnassociatedCRUD log_record_type				✓
Change Data Capture				
Receive Change Event Notifications for More Objects		✓		
Platform Events				
Publish Standard Events Without Using Allocations		✓		
Event Bus				
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				
Clarify and Formalize Enablement Goals with Distinct Program Outcomes			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Organize Your Programs with Sections			✓	
Add Einstein Conversation Insights in Enablement Programs			✓	
Get Step-By-Step Support When Building Enablement Measures			✓	
Show and Manage Text-Based Content in Enablement Programs More Easily			✓	
Create Enablement Programs and Measures More Efficiently			✓	
See Outcome and Milestone Progress Updates More Frequently			✓	
Analyze Outcome and Section Performance with Enablement Analytics			✓	
Other Changes in Enablement			✓	
Guidance Center and In-App Guidance				
Get the Latest In-App Content			✓	
Discover More Guidance Sets for Admins			✓	
Enablement Sites (myTrailhead)				
Export All Enablement Site Content with a Few Clicks		✓		

Experience Cloud

Boost SEO for your Aura and Lightning Web Runtime sites with structured data. A wealth of new and updated components in Experience Builder help you make visits to your LWR sites even more enjoyable for your users. Adjust the margin around individual components on enhanced LWR sites for pixel-perfect pages. On your enhanced Mobile Publisher for Experience Cloud apps, delight your users with string properties that respond to their device screen size.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Aura and LWR Sites				
Improve Your Site SEO with Structured Data	✓			
Search for CMS Content in Your Enhanced LWR Microsites	✓			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Search for CRM Records in Your LWR Sites (Beta)	✓			
Components in Experience Builder				
Open Support Cases with the Contact Support Form Component in LWR Sites			✓	
Use Micro-Batching to Process Guest Cases from the Contact Support Form			✓	
Create Component Visibility Rules in Enhanced LWR Sites (Pilot)				✓
Boost the Accessibility of Images in the Rich Content Editor Component	✓			
Add Next and Previous Buttons to the Grid Component	✓			
Adjust the Margin Around Individual Components in Enhanced LWR Sites	✓			
Create an Actions Bar in LWR Sites (Beta)		✓		
View and Edit Records Using the Record Detail Component in LWR Sites (Beta)		✓		
Developer Productivity				
Migrate Aura Sites to Google Analytics 4 (Release Update)			✓	
Level Up Your Site Deployments with New Metadata Types (Generally Available)		✓		
Create Custom Property Editors and Property Types for Lightning Web Components in LWR Sites (Developer Preview)		✓		
Troubleshoot Deployment Errors More Easily		✓		
Site Performance				
Exceed Person Account Ownership Limit		✓		
Get Notified About Micro-Batching Errors		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Validate the Micro-Batching Apex Method with Tests		✓		
Control Your Identity Experiences with Headless Login and Forgot Password Flows			✓	
Improve Component Caching in Aura Sites in Sandboxes			✓	
Mobile for Experience Cloud				
Set Up the Navigation Tab Bar Declaratively for Mobile Enhanced LWR Sites (Beta)		✓		
Assign Unique String Property Values for Different Devices in Custom Lightning Web Components (Beta)		✓		
Security and Sharing				
Apply User Access Permissions to Navigation Menus Retrieved by Apex in Experience Cloud Sites (Release Update)			✓	
Require Granular Flow Permissions for Experience Cloud Guest Users (Release Update)			✓	
Upgrade SAML Single Sign-On Framework (Release Update)			✓	
Manage Access to Personally Identifiable Information		✓		
Restrict Emails Sent from the Guest User (Release Update)			✓	
Hide First and Last Name Fields in the SOAP API Is Being Retired		✓		

Field Service

Customize the mobile app to suit your business needs, and drive mobile worker productivity with Offline Mobile UI Extensibility and Lightning web components. Easily schedule multiday appointments, and then check schedule accuracy with Enhanced Scheduling and Optimization. Set attributes for your assets that let you know when it's time for a checkup or repair. Improve communication and fix rates by using mobile screen sharing between customers and technicians, and make the most of Visual Remote Assistant with reports to guide your mobile workers. No need to juggle apps—work more efficiently on iPad with split-screen functionality and an improved user experience.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Resource Management				
Enhanced Scheduling and Optimization				
Get Additional Supported Features with Enhanced Scheduling and Optimization			✓	
Schedule Complex Work More Efficiently with Expanded Same Start Capabilities			✓	
Improve Resource Utilization and Scheduling Quality by Sliding Service Appointments with Dependencies			✓	
Get the Impact of In-Day Optimization With the Optimization Hub Dashboards			✓	
Get More Details When Manually Bundling Appointments	✓			
Asset Management				
Track Asset Performance with Asset Attributes			✓	
Create Appointments with Auto-Populated Addresses			✓	
Get Consistent Results with Standardized Work Order Generation			✓	
Migrate from Maintenance Plan Frequency Fields to Maintenance Work Rules (Release Update)			✓	
Customer Engagement				
Visual Remote Assistant				
Benefit from Screen Sharing on a Mobile Device During a Remote Visual Session	✓			
Replace Your Video Background with an Image During a Remote Visual Session		✓		
Improve Efficiency with Visual Remote Assistant Reports		✓		
Streamline the Appointment Assistant Experience		✓		
Mobile				
Lightning Web Components				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Customize the Field Service Mobile App with Mobile Offline Extensibility (Generally Available)		✓		
Upload and Annotate Images in the Field Service Mobile App		✓		
Locate Records in the Area to Get the Job Done		✓		
Reschedule Appointments from the Field		✓		
Shift Between Tasks Easily with Field Service Mobile for iPad	✓			
See Only the Inventory You Need	✓			
Ease Priming Tasks with Native Display of Primed Records		✓		
Limit Mobile Workers' Location Tracking More Easily for Appointment Assistant		✓		
Guide Your Mobile Workers at the Right Place and the Right Time (Pilot)			✓	
Spotlight on Field Service Content				
Plot a Path to Success with the Enhanced Scheduling and Optimization Learning Map	✓			
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

Industries solutions are tailored to what you do, so you don't have to customize Salesforce on your own. Automotive Cloud provides a template for connecting with stakeholders through Experience Cloud sites. In Health Cloud, the Crisis Support Center Management app helps counselors provide mental and behavioral health support, and authorization requests get better. Loyalty Management has a new wizard that makes it easier to manage promotions. Manufacturing Cloud offers improved sales agreements and forecasting. Public Sector Solutions make it easier to capture referrals and provide financial aid to constituents. Consumer Goods Cloud has a new Analytics app. Net Zero Cloud supports more fuel types and improved carbon accounting. We've also enhanced the data processing engine, added decision tables to flows, and much more.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Automotive Cloud				
Collaborate with Dealers and Customers Better with Experience Cloud			✓	
Track Complex Household Roles and Relationships			✓	
View Asset Participants Directly in Account and Contact Records			✓	
Create Product Bundles with Parent and Child Products			✓	
Manage Automotive Dealers Effectively with Branch Management			✓	
Assign Leads, Cases, and Opportunities Quickly to Automotive Dealers			✓	
Take Advantage of Enhancements to Sales Agreements and Advanced Account Forecasting			✓	
Get Insights into Leads and Prioritize Your Vehicle Portfolio			✓	
Service Experience Enhancements for Automotive				
Verify Caller Identity Over Messages			✓	
Improve Accessibility by Showing Business Names of OmniScripts			✓	
Find Action Launcher Deployments Quickly			✓	
Help Customers Faster by Launching Flow Orchestrations Quickly			✓	
Boost the Productivity of Customer Service Representatives			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Provide Localized Experience to Global Customer Service Representatives			✓	
Provide Enhanced Action Launcher Search Experience			✓	
Streamline Automotive Service Operations with Service Process Studio			✓	
Changed Objects for Engagement Interaction		✓		
Changes in the RecordActionDeployment Metadata Type		✓		
Actionable Segmentation for Automotive (Beta)				
Help Your Sales and Service Team Meet Their Targets (Beta)			✓	
Help List Creators Improve Their Sales and Service Team's Success (Beta)			✓	
Improve Engagement Abilities of Your Sales and Service Teams (Beta)			✓	
Actionable List Members Connect API (Beta)		✓		
Consumer Goods Cloud				
Implement Trade Promotion Management Faster with MuleSoft Accelerator			✓	
Track Performance Using Analytics for Consumer Goods - Advanced Data Model App			✓	
Record Customer Tasks Accurately with the New Mobile App Domain			✓	
Other Enhancements in Consumer Goods Cloud			✓	
Changed Objects in Consumer Goods Cloud		✓		
Financial Services Cloud				
Actionable Relationship Center				
Show Fields from Multiple Objects on an ARC Node		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Streamline Processes Using OmniScripts in an ARC Graph		✓		
Prevent Deletion of Custom Metadata Used in an ARC Graph		✓		
Include Custom Metadata When Packaging an ARC Graph		✓		
Customize ARC Nodes Using FlexCards		✓		
View ARC Graphs Vertically		✓		
Customize Field Labels on an ARC Graph		✓		
Customize Action Labels in an ARC Graph		✓		
Interaction Summaries				
Sync Interaction Data from Email and Calendar Applications by Using Einstein Activity Capture			✓	
Get Interaction Summaries Up and Running With Ease		✓		
Explore Accounts Associated With an Interaction		✓		
Capture Meeting Notes More Easily by Using the Rich Text Editor	✓			
Data Consumption Framework in Financial Services Cloud				
Connect to Core Banking Systems with Integrations Built for Scale			✓	
Discovery Framework in Financial Services Cloud				
Discovery Framework	✓			
Integration Definitions	✓			
Retail Banking and Wealth Management				
Improve Churn Prediction Accuracy for Retail Banking Customers	✓			
Improve Churn Prediction Accuracy for Wealth Management Customers	✓			
Address Update Service Process				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Streamline Client Address Updates Using Service Process Studio			✓	
Fee Reversal Service Process				
Reverse Fees for Clients Using Fee Reversal Service Process			✓	
Retail Banking				
View Real-Time Account and Financial Account Information in Salesforce			✓	
Actionable Segmentation (Beta)				
Enable Sales Executives to Build Actionable Lists (Beta)			✓	
Improve Your Sales Team's Success with Actionable List Members (Beta)			✓	
Help Your Sales Agents Reach Their Targets with an Outreach List (Beta)			✓	
Improve Engagement Abilities of Your Sales Teams (Beta)			✓	
New and Changed Financial Services Cloud Object Fields		✓		
New and Changed Tooling Objects in Financial Services Cloud		✓		
Health Cloud				
Integrated Care Management				
Create Care Plans Using a Guided OmniScript Flow			✓	
Build a Library of Reusable Definitions and Care Plan Templates		✓		
Get Recommendations When Creating Care Plans			✓	
Create Dependent Intervention Tasks with Action Plan Templates		✓		
Customize Integrated Care Management by Using OmniStudio		✓		
Contact Center for Health Cloud				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Capture Call Details in Real Time in the Contact Center			✓	
Verify the Caller's Identity in the Contact Center		✓		
Monitor the Progress of a Member's Engagement in the Contact Center			✓	
Track Contact Center Activities on the Timeline			✓	
View Critical Patient and Member Data in the Contact Center		✓		
Deploy Quick Actions from Action Launcher in the Contact Center			✓	
Get Alerts for Changes in Records in the Contact Center		✓		
View and Create Knowledge Articles in the Contact Center		✓		
Crisis Support Center Management				
Specify Client Details With a Simplified Intake Flow	✓			
Evaluate Clients and Identify Risks by Using Screening Assessments			✓	
View Engagement History on the Enhanced Timeline Component			✓	
Quickly Capture Important Information Using Notes			✓	
Find and Share Provider Details With Clients			✓	
Quickly Deploy Actions Using Action Launcher			✓	
Create and Share Knowledge Articles With Clients			✓	
Advanced Therapy Management Enhancements				
Perform Partial Rescheduling for Advanced Therapies		✓		
Visibility Updates for Appointment Slot Buttons in Advanced Therapy Management		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Track Enrollee Count in Advanced Therapies in More Detail	✓			
Guided Setup Update in Advanced Therapy Management	✓			
Virtual Care				
Include Multiple Participants in a Virtual Call	✓			
Meet Data Protection Requirements for Virtual Care by Using AWS Regions			✓	
Improved Moderation for Virtual Care			✓	
Intelligent Appointment Management				
Use Appointment Guidance to Choose the Best Appointment			✓	
Expanded Search Functionality in Intelligent Appointment Management			✓	
Use Engagement Channels with Intelligent Appointment Management			✓	
Self-Scheduling Enhancements for Intelligent Appointment Management			✓	
Utilization Management Enhancements				
Improve Patient Care with Concurrent Reviews			✓	
Streamline Submission of Authorization Requests			✓	
Speed up Approval Processes with Enhanced Business Rules			✓	
Utilization Management Solution for Providers			✓	
Health Cloud for Life Sciences				
Improve Customer and Patient Engagement with Events and Milestones			✓	
Intelligent Document Automation				
Support for Picture Identification Document Type in Intelligent Document Automation			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Map Different Record Types with Intelligent Document Automation			✓	
Identity Verification Enhancements				
Verify Customer Identity over Messages			✓	
Action Launcher				
Assist Customers Quickly with Flow Orchestrations in Action Launcher			✓	
Boost Response Time with Frequently Used Actions			✓	
Set Up Action Launcher Faster with Filtered Deployment Lists		✓		
Unified Health Scoring Enhancements				
Get Started with Unified Health Scoring Faster by Using the Unified Health Scoring Data Kit			✓	
Replacing the EHR Data Model with the Clinical Data Model		✓		
Health Cloud Has New and Changed Objects		✓		
New Salesforce Healthcare APIs			✓	
Connect REST API				
Changed Connect REST API Request Bodies		✓		
Changed Connect REST API Response Bodies		✓		
New Health Cloud Metadata Types		✓		
MuleSoft Direct for Health Cloud			✓	
Intelligent Sales Sample Flows for Field Inventory Management				
Capture and Fulfill Sample Requests			✓	
Capture and Fulfill Trial Requests			✓	
Capture and Fulfill Loan Requests			✓	
Manage Retrieval of Products Given on Loan or as a Trial			✓	
Register Missing Products to Keep Track of Your Inventory			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Relate a Product to a New or Existing Order			✓	
Loyalty Management				
Configure Promotions with a Guided Wizard	✓			
Customer Service for Loyalty Program Members				
Member and Member Representative Identity Verification				
Service Console for Loyalty Program Members				
Issue Vouchers with Codes of Your Choice			✓	
Member Referral Code				
Get Your Member Referral Scheme Up and Running	✓			
Manage Requests to Change Referral Codes	✓			
Member Engagement Widgets				
Create Member Engagement Widgets Easily		✓		
Encourage Members to Refer Your Loyalty Programs		✓		
Show Badges to Program Members		✓		
Show Transaction History to Program Members		✓		
Show Vouchers to Program Members		✓		
Show Eligible Benefits to Program Members		✓		
Enable Program Members to Select Their Benefits		✓		
Nudge Program Members to Complete Challenges in Cumulative Promotions		✓		
Nudge Program Members to Redeem Expiring Points		✓		
Enable Customer Service Reps to Merge Memberships and Transfer Benefits Easily		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Track Member Status Changes Including Subscriptions	✓			
Promotion Setup				
Schedule Batch Jobs to Change Member Tiers		✓		
Select Resources Without Combing Through Lists	✓			
Call Loyalty Management Invocable Actions Using Invocable Namespace		✓		
Track Member Engagement Easily	✓			
Easily Monitor Transactions and Prevent Fraud			✓	
New and Changed Objects in Loyalty Management		✓		
New Invocable Action in Loyalty Management		✓		
New and Changed Loyalty Management Metadata Types		✓		
Changed Connect REST API Request Bodies		✓		
Manufacturing Cloud				
Manufacturing for Sales				
Sales Agreements Enhancements			✓	
Control Access to Mass Update and Import CSV for Advanced Account Forecasting			✓	
Account No Longer Mandatory for Forecasts			✓	
Actionable Segmentation for Manufacturing Cloud (Beta)			✓	
Connect REST API for Actionable List Members (Beta)			✓	
New and Changed Tooling Objects		✓		
New and Changed Manufacturing Cloud Metadata Types		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
New Invocable Action in Manufacturing Cloud		✓		
Manufacturing for Service				
Identity Verification			✓	
Action Launcher			✓	
Design a Manufacturing Service Process with Service Process Studio			✓	
Public Sector Solutions				
Connect REST APIs			✓	
Composable Case Management				
Capture Referral Details More Efficiently Using Guided Flows and Assessments			✓	
Gain Deeper Insight into Constituent Relationships				
Capture Key Relationships in Households or Groups of Constituents			✓	
Let Caseworkers Easily Access Notes with Interaction Summaries				
Enhanced Care Plans				
Support Constituent Needs using Benefit Management			✓	
Administer Services to Constituents Using Programs			✓	
Leverage Data Model for Grantmaking			✓	
Easily Configure Your Org Using Guided Setup			✓	
New and Changed Objects in Public Sector Solutions			✓	
New and Changed Public Sector Solutions Metadata Types		✓		
New Invocable Action in Public Sector Solutions		✓		
Connect REST API				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Changed Connect REST API Request Bodies		✓		
Changed Connect REST API Response Bodies		✓		
PublicSectrStIn Namespace				
Net Zero Cloud				
Take Advantage of More Fuel Types in Emissions Calculations				
Manage Social and Governance Data				
Manage Carbon Accounting for Extended Organizational Boundaries				
Let Partner Community Users Use Experience Cloud to Perform Carbon Accounting				
Easily Generate Disclosures Through the Disclosure and Compliance Hub				
Generate a GRI Standards Report with the Disclosure and Compliance Hub Template				
Generate a CDP Report with the Disclosure and Compliance Hub Template				
Identify Gaps and Lead Your DEI Initiatives by Using CRM Analytics			✓	
Plan for Short-Term Emission Reductions by Using Monthly Air Travel Emission Predictions	✓			
Reduce Your Company's Carbon Footprint by Using Supply Chain Emission Predictions	✓			
New and Changed Objects for Net Zero Cloud				
New and Changed Net Zero Cloud Metadata Types		✓		
Salesforce for Education			✓	
Salesforce for Nonprofits			✓	
Industries Common Components				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Actionable Segmentation (Beta)				
Build Customer Segments and Personalize Outreach Initiatives with Actionable Segmentation (Beta)				
New Objects in Actionable Segmentation (Beta)		✓		
New Metadata Types (Beta)		✓		
AI Accelerator				
Create Predictive Use Cases		✓		
Compute Features in Real Time or in Batches, and Upload Sample Features		✓		
Changed Objects in AI Accelerator		✓		
Changed Tooling Objects in AI Accelerator		✓		
Connect REST API		✓		
Action Launcher				
Changes in the Action Launcher Metadata Type		✓		
Actionable List Members (Beta)				
New Connect REST API Resources (Beta)		✓		
Business Rules Engine				
Expression Set Builder Enhancements	✓			
View Expression Set Versions with a Single Click	✓			
Migrate Expression Sets Quickly and Easily		✓		
Scratch Org Feature			✓	
New Metadata Types			✓	
Data Consumption Framework				
Connect to External Systems with Integrations Built for Scale			✓	
Data Processing Engine				
Use Analytics Dataset as a Data Source		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Save Transformed Data in Analytics Datasets for Improved Performance		✓		
Use Custom Nodes in Data Processing Engine Definitions (Beta)		✓		
View the Number of Records Processed by a Definition's Nodes		✓		
New and Changed Data Processing Engine Metadata Types		✓		
Decision Explorer				
Connect REST API		✓		
Discovery Framework				
Give Respondents the Option to Digitally Sign a Form			✓	
Submit Responses to an Assessment More Quickly		✓		
Use QR Codes on Assessment Forms		✓		
New and Changed Discovery Framework Objects and Fields		✓		
Einstein Relationship Insights				
Streamline Relationship Recommendations by Using Relationships Filter	✓			
Get Updates for Records You Follow on Your Home Page	✓			
See How You're Connected with Prospects			✓	
Enhanced Einstein Relationship Insights User Experience	✓			
Active Record Model Is Now Retired	✓			
Einstein Relationship Insights Has New Objects	✓			
Engagement				
Changed Objects		✓		
Integration Definitions				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Quickly Set Up Integrations with External Endpoints		✓		
Intelligent Document Reader				
Extract Information from Identity Documents with High Accuracy		✓		
See the Improved Language for Intelligent Document Reader		✓		
Changed Objects in Intelligent Document Reader		✓		
Changed Tooling Objects in Intelligent Document Reader		✓		
New and Changed Intelligent Document Reader Metadata Types		✓		
Connect REST API		✓		
Intelligent Form Reader				
Extract Information from Identity Documents with High Accuracy		✓		
See the Improved Language for Intelligent Form Reader		✓		
Changed Objects in Intelligent Form Reader		✓		
Changed Tooling Objects in Intelligent Form Reader		✓		
New and Changed Intelligent Form Reader Metadata Types		✓		
Connect REST API		✓		
Industry Integration Solutions				
Configure the Connection to an External System			✓	
Update the Integration App Version			✓	
Automatically Register and Deregister Industry APIs			✓	
Update Previous Named Credentials			✓	
Rebate Management				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Increase Scalability of Your DPE Definitions with Custom Node (Beta)		✓		
Record Alerts				
Connect REST API		✓		
Service Process Studio				
Streamline Customer Service Operations with Service Process Studio			✓	

Marketing Cloud Account Engagement

Now you have access to actionable recommendations to improve system processing in your business unit. Plus, review and correct errors that occur in your External Action integrations.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
General Enhancements				
Improve Efficiency in Your Business Unit with Account Engagement Optimizer (Beta)		✓		
Sending Domain Validation Is Changing		✓		
The DomainKey Policy Column Is Being Removed		✓		
The Default for Some Account Engagement Settings Is Changing	✓			
The Option to Run Automation Rules in Real Time Is Being Retired	✓			
Monitor External Action Errors to Keep Automations Running Smoothly		✓		
Review External Actions Usage		✓		
How Long Inbox Preview Renders Are Stored Is Changing	✓			
Open PDF Files in Your Browser	✓			
APIs and Integrations				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
The ReadyTalk Connector Is Being Removed	✓			
The Webex Connector Is Being Removed	✓			
The Account Engagement for Slack Beta Is Being Retired	✓			
Account Engagement API: New and Changed Items		✓		

Mobile

In the Salesforce mobile app, enjoy an improved contacts experience and enable all mobile features in one place with a new Setup panel. Mobile Publisher for Experience Cloud now supports Lightning Web Runtime (LWR) sites (beta). Prime more objects for offline use with Briefcase Builder.

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				
Landscape Support for Phones (Beta) Is Now Available			✓	
Get Optimized Mobile Reports with Enhanced Reports (Generally Available)	✓			
Go Mobile with Assigned Orchestration Work		✓		
Plan for the Retirement of Setting Security Policies via Custom Attributes	✓			
Plan for Salesforce Mobile App Community License Access Retirement			✓	
Prevent Access to Salesforce Web Classic for Lightning-Only Mobile Users	✓			
Legacy Tablet App Experiences Are Retired		✓		
Do More with Enhanced Contacts (Beta)			✓	
Reduce Setup Complexity with a New Feature Panel			✓	
Mobile Publisher				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Gain Access to Mobile Device Features with User Permissions	✓			
Encourage Users to Update to the Latest Mobile Publisher App Version		✓		
Mobile Publisher for Experience Cloud Supports Lightning Web Runtime (LWR) Sites (Beta)		✓		
Configure the Navigation Tab Bar for Mobile Publisher for Experience Cloud Enhanced LWR Sites (Beta)			✓	
Use Unique String Property Values for Mobile Devices in Custom Lightning Web Components (Beta)		✓		
Request App Ratings and Reviews from Users	✓			
UI Test Automation Model (UTAM) for Mobile Publisher Apps	✓			
New Screenshot Size for Apple App Store Listing Is Available	✓			
Briefcase Builder				
Prime More Objects with Your Briefcase			✓	

Revenue

Decrease subscription quantities, sell more easily in self-service channels, and include up to 100 lines per transaction. Note a Salesforce CPQ Plus and Salesforce Billing change to asset relationships.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Subscription Management				
Downsell a Subscription			✓	
Price, Change Quantities, and Cancel Subscriptions in Self-Service Channels			✓	
Cancel a Subscription as of a Future Date			✓	
Automate Customer Refunds			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Track Field History on Quotes and Quote Line Items			✓	
See Whether Records Included in Invoice Batch Run Recovery Operations Were Processed			✓	
Get More Insight from Einstein Late Payment Risk (Beta)	✓			
Void Invoices with Negative Lines (Beta)			✓	
Professional Edition Isn't Supported	✓			
Salesforce CPQ and Salesforce Billing				
Changes to Asset Relationships Are No Longer Supported in Salesforce CPQ Plus or Salesforce Billing	✓			

Sales

Streamline sales management processes, automate reps' work, and close deals faster with new enhancements to core and productivity features. Revenue Intelligence users can try Account Discovery, a new feature with dashboards and Einstein Discovery models. Enablement teams can use Einstein Conversation Insights to verify if their programs are changing how reps talk to customers. Take the dynamic Activity Composer for a spin where everything is one click away. Determine compensation for reps based on their territory assignment dates. Design marker layers that get attention from more reps in Salesforce Maps.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Core Sales Features				
Collaborative Forecasts				
Build Custom Forecasts Pages That Work for Your Business			✓	
Get More Flexibility for Tracking Forecasts by Custom Date			✓	
Experience a Modern Forecasts Page	✓			
Custom Measure Forecasts Offered in Professional and Enterprise Editions			✓	
Enterprise Territory Management				
Track Territory Assignment History			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Other Changes in Core Sales Features				
Break Up Record Details in Leads			✓	
Import Contacts and Leads with a Guided Experience			✓	
Collaborate on Complex Deals with Opportunity Product Splits (Pilot)				✓
Productivity Features				
Einstein Activity Capture				
Gain More Insights from Events on the Activity Timeline		✓		
Activities				
Take Action More Quickly in the Dynamic Activity Composer	✓			
Get the Play-by-Play with Field History Tracking for Activities	✓			
Email Templates				
Let Email Templates Suggest a Cadence for a Recipient			✓	
Email Experience				
Verify Your Email Address to Send Email Through Salesforce	✓			
Verify Ownership of Your Salesforce Domain for Email Verification	✓			
Prepare for Hourly Send Limits for Single Emails	✓			
Let Customers Pick Their Own Meeting Times in Lightning Experience	✓			
Define Email Preferences in the Activity Composer	✓			
Salesforce Inbox				
Inbox Mobile App	✓			
Let Your Customers Pick Their Own Meeting Times	✓			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Propose Future Meeting Times Easily in Outlook and Gmail Integrations	✓			
Remind Users Automatically to Install the Outlook and Gmail Extension	✓			
Sales Dialer				
Guard Your Outgoing Calls Against Robocalling Filters			✓	
Sales Engagement				
Let Users Optimize Their Sales Process and Automate Repetitive Tasks (Beta)			✓	
Let Reps Create Their Own Outreach Templates with Quick Cadences			✓	
Assign Targets to Multiple Cadences for Separate Purposes	✓			
Let Call Scripts Suggest a Cadence for a Recipient	✓			
Complete Cadence Tasks Directly from the To Do List	✓			
Automatically Assign New Leads to a Cadence		✓		
Wait Steps Respect the Skip Weekends Setting			✓	
Revenue Intelligence				
Get Account Health Details with Account Discovery	✓			
See Historical Trends for Your Forecast Items	✓			
Switch Between Different Forecast Types in Revenue Insights	✓			
Maximize Your Deal Size and Win Rate, and Reduce Time to Close	✓			
Pipeline Inspection				
Get Pipeline Inspection in Enterprise Edition Without an Add-On License			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
View Pipeline Changes for Key Time Periods in Pipeline Inspection			✓	
Edit Opportunities with Multiple Record Types Inline in Pipeline Inspection List Views	✓			
Enablement for Sales Teams				
Find Out What's New for Enablement			✓	
Einstein Conversation Insights				
Report on Insights from Voice and Video Calls			✓	
Call Transcripts Hide Personal Information	✓			
Get Improved Contact Matching for Video Calls			✓	
Use Conversation Insights Measures with Enablement			✓	
Assess Your Readiness and Return on Investment for Einstein Conversation Insights			✓	
Integration with Microsoft®				
Lightning Sync for Microsoft® Exchange®				
Get Ready to Roll Out Einstein Activity Capture for Microsoft		✓		
Salesforce for Outlook (Retiring)				
Salesforce for Outlook Is Retiring in June 2024	✓			
Integration with Google				
Lightning Sync for Google (End of Sale)				
Get Ready to Roll Out Einstein Activity Capture for Google		✓		
Salesforce Maps				
Salesforce Maps				
Style Your Markers for Greater Visibility	✓			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Build Marker Layers with Confidence	✓			
Salesforce Maps Territory Planning				
Establish Sequential Approvals for Alignments	✓			
Plan Large Territory Models in Less Time	✓			
Map New Boundaries		✓		
Other Improvements in Salesforce Maps Territory Planning	✓			
Sales Cloud Einstein				
Estimate Your Company's Return on Investment for Einstein Forecasting	✓			
Other Changes in the Sales Cloud		✓		

Salesforce CMS

Define how long Salesforce CDN stores CMS content for a channel. Assign the new content author role to CMS workspace contributors. In enhanced CMS workspaces, use CMS Workflows to route your content to workspace contributors for review and approval. View content version history and restore previous versions of published content. Find content more easily with smart searches.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Set a Cache Duration for CMS Content Served in Salesforce CDN Channels		✓		
Expand CMS Content Collaboration with the Content Author Role		✓		
Approve Content and Create Workflows in Enhanced CMS Workspaces (Beta)			✓	
View and Restore Content Version History in Enhanced CMS Workspaces	✓			
Explore Your Enhanced CMS Workspace Content with Smarter Searches	✓			
Publish Translation Variants and Related CMS Content in Enhanced CMS Workspaces		✓		

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			✓	
Flow Builder				
Flow Builder Updates				
Bring External Data into Flow Builder Without Code (Beta)		✓		
Build Screens with Reactive Components (Beta)		✓		
Add Lookup Fields to Your Flow Screens with Ease		✓		
Select Multiple Options in Dynamic Forms for Flow		✓		
See Element Descriptions on the Flow Canvas		✓		
Get a Streamlined Flow Element Menu		✓		
Flow Runtime				
Resume Behavior Changed for Flows Launched by Process Builder Processes	✓			
Select a Value from a List of Choices with the Choice Lookup Component (Beta)			✓	
Select Multiple Records from a Table in a Flow Screen (Generally Available)			✓	
Apex Static Variables Are Reset Within a Transaction Between Groups of Platform Event–Triggered Flow Interviews	✓			
Flow and Process Run-Time Changes in API Version 57.0		✓		
Flow Management				
Convert Processes to Flows with the Migrate to Flow Tool		✓		
Flow Extensions				
Use Flow Screen Components with Flow in Slack (Generally Available)		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Send a Screen Flow to Slack with an Action (Generally Available)			✓	
Run Screen Flows from Slack (Beta)		✓		
Search for an Individual in a Flow (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 (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)		✓		
Enforce Rollbacks for Custom Invocable Action Exceptions in REST API (Release Update)			✓	
Require User Access to Apex Classes Invoked by Flow (Release Update, Retired)			✓	
Flow Orchestration				
Use Advanced Settings for an Orchestration			✓	
Create a Record-Triggered Orchestration on the Core Tab			✓	
Go Mobile with Assigned Orchestration Work		✓		
Enable Sharing for Flow Orchestration Objects (Release Update)			✓	
Other Improvements		✓		
OmniStudio				
OmniStudio Updates				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Standard OmniStudio Runtime Setting Name Was Changed			✓	
OmniStudio FlexCards Updates		✓		
OmniScripts Updates	✓			
OmniStudio DataRaptors and Integration Procedures Updates		✓		
OmniStudio Minor Release Updates				✓
OmniStudio for Vlocity Updates				
OmniStudio for Vlocity FlexCards Updates		✓		
OmniStudio for Vlocity OmniScripts Updates		✓		
OmniStudio Migration Tool Updates		✓		

Security, Identity, and Privacy

Boost your security and compliance gains more conveniently. Enhanced Domains are deployed, and the first phase of multi-factor authentication (MFA) auto-enablement begins. Get more information-rich audit logs and monitoring solutions for file events and insecure login flows. Experience Cloud users can log in to third-party apps and reset passwords right from your sites. Enjoy more Security Center data visualization options with CRM Analytics. And use Privacy Center to extend consent preference options to customer subscription communications.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Backup and Restore				
Identify Required Object Access Permissions Faster				
Get Ready for Backup and Restore Service Updates				
Domains				
Deploy Enhanced Domains (Release Update)			✓	
Review the Milestones for Enhanced Domains Deployment and Enforcement		✓		
Test Enhanced Domains with Service Cloud Voice		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Monitor More My Domain Settings		✓		
Use Partitioned Domains in Hyperforce		✓		
Allow Partitioned Domains for Demo Orgs		✓		
Identity and Access Management				
MFA Auto-Enablement: Find Out When and How Your Org Is Affected (Release Update)		✓		
Chatter Free and Chatter External Users Are Automatically Excluded from MFA Auto-Enablement and Enforcement		✓		
Check the Revocation Status of User Authentication Certificates			✓	
Insert Consumer Secrets in Authentication Providers Manually in All Change Sets and Packages			✓	
Monitor Connected App Logins That Use Insecure Flows			✓	
Upgrade SAML Single Sign-On Framework (Release Update)			✓	
Take Charge of Your Identity Experiences with Headless Login and Forgot Password Flows			✓	
Simplify Login to Salesforce Easy with Welcome.salesforce.com and the Environment Switcher				✓
Other Changes in the Salesforce Authenticator Mobile App	✓			
Health Check				
URL Redirection Health Check Setting		✓		
Privacy Center				
Subscription Preference Forms		✓		
Customize Channel Types		✓		
Salesforce Shield				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Event Monitoring				
Generate Event Log Files			✓	
Track File Events		✓		
Get the Category of the Apex Unexpected Exception Event	✓			
SOAP API Exception Message		✓		
Event Monitoring Analytics App Improvements			✓	
Shield Platform Encryption				
Encrypt More Financial Services Interaction Data			✓	
Referral Name No Longer Supported				
Include Encrypted Data in More Einstein Apps (Generally Available)			✓	
Security Center				
CRM Analytics		✓		
Data Labels		✓		
Data Mask				
Process Data Mask Jobs Faster		✓		
Get Improved Unique Field Masking		✓		
Other Changes				
Enable Content Sniffing Protection (Release Update)			✓	
Use AWS Roles Anywhere with Named Credentials			✓	
Use OAuth JWT Bearer Flow with Named Credentials			✓	
Make a Private Connection with Named Credentials			✓	
Review Your Clickjack Protection Settings		✓		

Service

Explore new Service Cloud features that help you and your team deliver efficient, high-quality service. Share links, questions with options, appointment time slots, post-conversation surveys, and more with messaging components, which are available in enhanced Facebook Messenger channels and Messaging for In-App and Web. Service Cloud Voice call handling time has been improved with the triggering of real-time actions based on intelligence signals detected during calls. Einstein Conversation Mining harnesses the power of Einstein to save you from time-consuming transcript analysis. Send, receive, and view Slack messages from Lightning Experience with the Slack Conversations component. Send internal communications when an incident occurs with new broadcast alerts and broadcast Slack messages. Measure Knowledge ROI with out-of-the-box dashboards for CRM Analytics. Add a screen flow template to help agents find and link callers to leads, contacts, or employees. And more.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Channels				
Messaging				
Send Structured Content with Messaging Components	✓			
Get Enhanced Messaging for Facebook Messenger	✓			
Get Enhanced Messaging for WhatsApp		✓		
Customize Your Consent Conversations for Facebook Messenger	✓			
Manage Consent in Customers' Preferred Languages for Facebook Messenger	✓			
Collect Valuable Customer Data with Hidden Pre-Chat Fields in Messaging for In-App and Web		✓		
Let Authenticated Customers Access Messaging for In-App and Web History with User Verification		✓		
Quickly Add Context to Conversations with Knowledge Component Actions		✓		
Increase Agent Productivity with the Actions & Recommendations Component in Messaging		✓		
Mark Messaging Sessions Inactive	✓			
Choose an Action for Your Return or Enter Key in Messaging for Web		✓		
Connect Leads to Messaging Users		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
View and Share Files More Easily in Messaging for In-App		✓		
Explore Messaging with Trailhead	✓			
Voice				
Reduce Agent Handling Time with Conversation Intelligence		✓		
Unify Queue Management in Salesforce and Your Telephony Provider (Generally Available)		✓		
Sync Agent Presence Statuses Automatically for Each Contact Center		✓		
Customize Softphone Controls and Voice Extensions		✓		
Automate Agent Tasks with Customized Screen Pops		✓		
Add a Flow Template for Find Contact Associated with Voice Call		✓		
Track More AWS Cost and Usage Metrics with Service Cloud Voice		✓		
Update Service Cloud Voice After a My Domain Change		✓		
Reach Your Customers Using High-Volume Outbound Calls				✓
Authenticate Callers Using Their Voice			✓	
Build Your Voice Call Journeys with Modularized Flows in Amazon Connect		✓		
Fewer Permissions Required to Manage Your Contact Center		✓		
Increase Productivity with an Improved Softphone	✓			
Preview Estimated Wait Times Before Transferring Calls	✓			
Give Your Developers the Latest Service Cloud Voice Features		✓		
Einstein for Service				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Einstein Classification				
Add More Fields When You Train Your Classification Model (Pilot)			✓	
Use Encrypted Fields to Build Your Einstein Model (Generally Available)			✓	
Einstein Reply Recommendations				
Use Encrypted Fields to Build Your Reply Recommendations Model			✓	
Einstein Bots				
Optimize Bot Performance with Goals Enhancements		✓		
Enhanced Bots				
Einstein Conversation Mining Integrations (Beta)		✓		
Use the Redirect to Variable Dialog for Enhanced Navigation		✓		
Analyze Bot Performance with New Standard Reports		✓		
Bots Moved to the Setup Node for Added Visibility		✓		
Learn More about Change Sets and Einstein Bots in Salesforce Help		✓		
Einstein Conversation Mining (Beta)				
Get to Know Einstein Conversation Mining (Beta)		✓		
Use Einstein Conversation Mining (Beta) with Einstein Bots Integrations		✓		
Swarming				
Collaborate on a Slack Swarm from Lightning Experience (Slack Conversation for Salesforce Record)			✓	
Dive Deeper into Swarms with Expanded Reporting Functionality			✓	
Request the Right Swarm Member with Searchable Skills			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Catch Up on Service Cloud for Slack App Features			✓	
Incident Management				
Share Incident Updates Internally with Broadcast Slack Messages and Alerts			✓	
Minimize Service Disruptions with the Flow Automation Pack for Incident Management			✓	
Routing				
Interrupt Long-Running Work to Handle Time-Sensitive Work (Pilot)				✓
Monitor Contact Center Health in the Omni-Channel Wallboard (Pilot)				✓
Find Work Items or Agents with the Right Skills		✓		
Notify Agents About New Work Using Alerts	✓			
Let Supervisors Manage Queues and Shrink Wait Times			✓	
Migrate Supervisor Configurations with Ease		✓		
Improvements to Omni-Channel Flows		✓		
Knowledge				
Get Actionable Knowledge Insights				
Change Knowledge Record Types for Translated Articles				
Report on Draft Knowledge Articles in CRM Analytics				
Embody Knowledge Best Practices with Updated AppExchange Packages				
Quickly Add Context to Conversations with Knowledge Component Actions		✓		
Build a Lightning App with Knowledge UI APIs				
Cases				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Prevent Duplicate Cases with Lightning Threading in Email-To-Case			✓	
Disable Ref ID and Transition to New Email Threading Behavior (Release Update)			✓	
Shrink Outgoing Emails and Include Only New Content			✓	
Meet Corporate Policy by Sending Case-Related Emails with Your Servers			✓	
Use a Default No-Reply Address as System Address for Case Email Notifications (Release Update)	✓			
Log a Call from a Case's Activities Component		✓		
Preserve an Email's HTML Style in a Case Feed		✓		
Shift Scheduling				
Improve Contact Center Operations with Efficient Shift Scheduling	✓			
Build Shifts Fast with Shift Patterns	✓			
Feedback Management				
Distribute Surveys Through Recipient-Preferred Channels		✓		
Build Better UIs for Custom Surveys		✓		
Easily Implement Feedback Management for Service Cloud		✓		

Supported Browsers

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

IN THIS SECTION:

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

See the supported browsers and devices for Lightning Experience.

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

See the supported browsers and devices for Salesforce Classic. 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 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. You can’t access the Salesforce mobile app on these devices. Users are 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	Supports latest stable browser version	Supports latest stable browser version	Not supported

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

Multi-factor authentication (MFA) auto-enablement for direct logins starts in Spring '23. Get more out of Salesforce Scheduler with enhancements to appointments. See more information related to your work with new configurations available for fields in Search Manager.

IN THIS SECTION:

[General Enhancements](#)

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

[Salesforce Scheduler](#)

Schedule video appointments with Amazon Chime. Enable service resources and customers to quickly view past and upcoming appointments. Use Omni-Channel service resources in Salesforce Scheduler. Show available service resources based on engagement channels. Explore many other enhancements in Salesforce Scheduler.

[Einstein Search](#)

Get results geared toward how you work. With Search Manager, you configure your searchable fields, even picklists, to see information related to your work. You can also receive specific answers from a knowledge article to help answer your questions with Einstein Search Answers. With the help of our new Einstein Search Learning Map, you can quickly onboard to what Einstein Search has to offer.

General Enhancements

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

IN THIS SECTION:

[Be Ready for MFA: Auto-Enablement Starts with Spring '23](#)

As of February 1, 2022, users are contractually required to use multi-factor authentication (MFA) when they access Salesforce orgs, either through direct logins with a username and password or single sign-on (SSO) logins. To help customers meet this requirement, Salesforce is automatically enabling MFA for direct logins. This action will occur in phases throughout 2023, starting with Spring '23. Eventually we'll enforce 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.

[Major Release Notification Emails Are Streamlined](#)

To reduce the number of emails that you receive, the Release Is Live email is updated, and the Features Enabled email is discontinued. When a major release upgrade is complete for your instance, you receive an email with a subject line that starts with "Release Is Live." That email now includes updated language about the timing of feature availability. Previously, you received a separate email with a subject line that started with "Features Enabled" that outlined feature availability for the release.

[Limit the Maximum Number of Loaded Lightning Console Tabs in a Session](#)

By default, content is loaded in all console tabs opened during a Lightning console session. To improve memory usage and the scalability of console sessions in Lightning Experience, set the maximum number of loaded console tabs. If you exceed the limit during a console session, this feature unloads your least recently used tabs until your tab limit is met. Unloaded tabs are still visible in your tab navigation, but they only reload their content when you click them.

[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.

[Log In with More Domain Formats](#)

Enhanced domains and partitioned domains change the format of the login URLs for your Salesforce org and your sites. To help you log in faster, when you log in with a custom domain on `login.salesforce.com` or `test.salesforce.com`, the autocomplete function includes these new formats. As always, you can also visit the login URL directly.

[View and Manage Quotes Using the Your Account App](#)

Salesforce account executives can now publish add-on quotes for Salesforce customers to review and sign in Your Account. Completed quotes are available to view and download. Previously, Salesforce customers couldn't access quotes in Your Account.

[Get Your Account App Renewal Notifications](#)

Your Account users can see updated notifications regarding their contract renewal and can manage their contracts in the Your Account app. Getting timely notifications helps users stay aware of the contracts where they must act to renew before expiration so contracts are always up to date.

[Give Billing Contacts Your Account App Access](#)

Make sure the billing contact on each Salesforce contract has access to the Your Account app by granting access from the Contract page. When you give billing contacts access to Your Account, users are given the permissions they must have to manage their billing and contracts.

Be Ready for MFA: Auto-Enablement Starts with Spring '23

As of February 1, 2022, users are contractually required to use multi-factor authentication (MFA) when they access Salesforce orgs, either through direct logins with a username and password or single sign-on (SSO) logins. To help customers meet this requirement, Salesforce is automatically enabling MFA for direct logins. This action will occur in phases throughout 2023, starting with Spring '23. Eventually we'll enforce 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: Salesforce is auto-enabling MFA over several releases via the MFA Auto-Enablement Release Update. To know when your Salesforce production org is affected, see [MFA Auto-Enablement: Find Out When and How Your Org Is Affected \(Release Update\)](#). To monitor the MFA enforcement milestone schedule, see the [MFA Enforcement Roadmap](#).

How: To get extra protection against cyberattacks sooner, we encourage you to implement and roll out MFA on your own instead of waiting for Salesforce to do it. And controlling your rollout schedule means you can avoid conflicts with other initiatives at your company and unexpected disruptions to your busy users.

To roll out MFA yourself:

- Watch the [Launch Multi-Factor Authentication](#) video for the steps to turn on MFA.
- Get customizable change management templates by downloading the [MFA Rollout Pack](#).

 **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 users who access Salesforce via SSO. To satisfy this requirement, you can use your SSO provider's MFA service.

SEE ALSO:

[Knowledge Article: Everything You Need to Know About MFA Auto-Enablement and Enforcement](#)

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

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

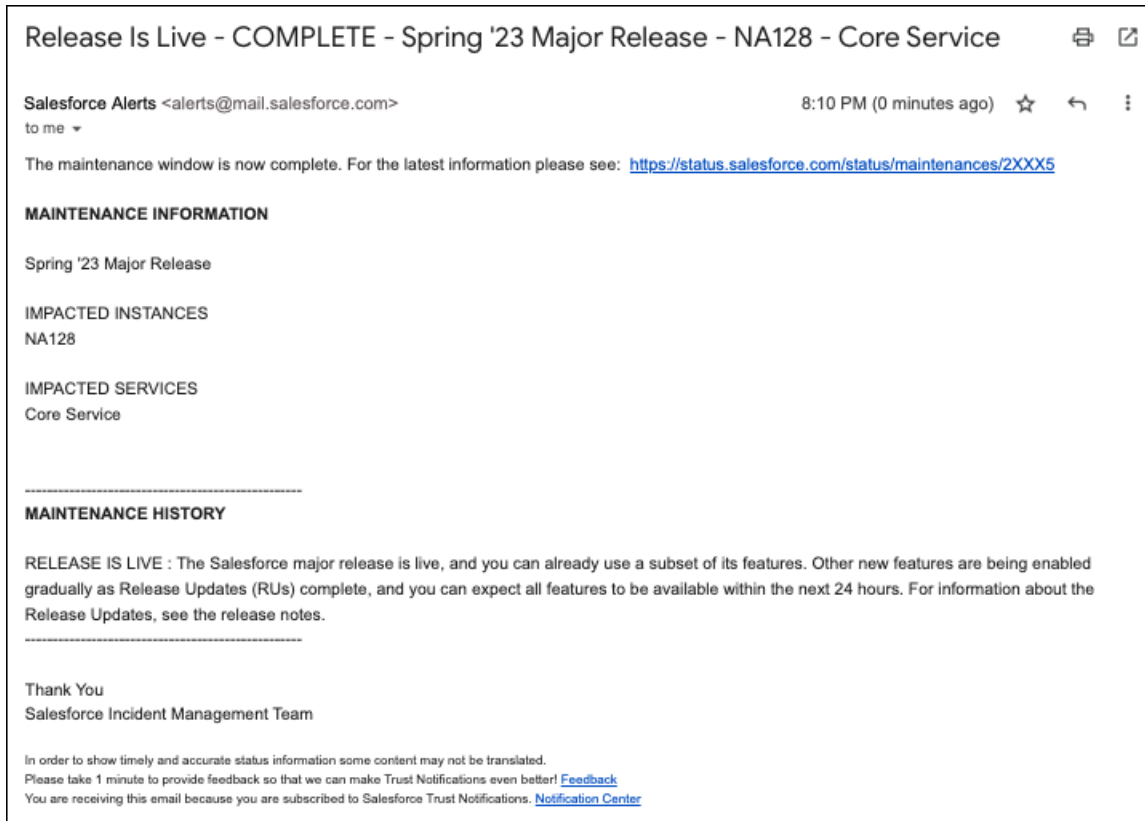
[External Link: MFA for Salesforce Customer Site](#)

Major Release Notification Emails Are Streamlined

To reduce the number of emails that you receive, the Release Is Live email is updated, and the Features Enabled email is discontinued. When a major release upgrade is complete for your instance, you receive an email with a subject line that starts with "Release Is Live." That email now includes updated language about the timing of feature availability. Previously, you received a separate email with a subject line that started with "Features Enabled" that outlined feature availability for the release.

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

Why: Here's an example email notification that the Spring '23 upgrade is complete for instance NA128.



Limit the Maximum Number of Loaded Lightning Console Tabs in a Session

By default, content is loaded in all console tabs opened during a Lightning console session. To improve memory usage and the scalability of console sessions in Lightning Experience, set the maximum number of loaded console tabs. If you exceed the limit during a console session, this feature unloads your least recently used tabs until your tab limit is met. Unloaded tabs are still visible in your tab navigation, but they only reload their content when you click them.

Where: This change applies to 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.

Who: Only users with administrator permissions can set a loaded console tab limit.

How: From Setup, in the Quick Find box, enter *Loaded Console Tab Limit*, and then select **Loaded Console Tab Limit**. Turn on the feature, and enter a positive integer for Maximum Number of Loaded Console Tabs.

SEE ALSO:

[Salesforce Help: Limit the Maximum Number of Loaded Lightning Console Tabs \(can be outdated or unavailable during release preview\)](#)

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.

SEE ALSO:

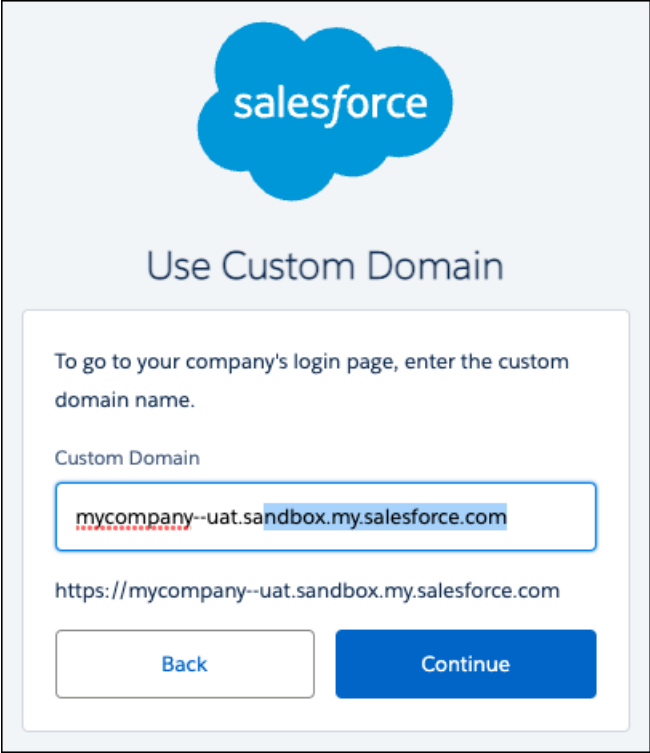
[Release Updates](#)

Log In with More Domain Formats

Enhanced domains and partitioned domains change the format of the login URLs for your Salesforce org and your sites. To help you log in faster, when you log in with a custom domain on `login.salesforce.com` or `test.salesforce.com`, the autocomplete function includes these new formats. As always, you can also visit the login URL directly.

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

How: For example, when you click **Use Custom Domain** on `test.salesforce.com` and enter `mycompany--uat.sa`, the autocomplete function populates the Custom Domain field with `mycompany--uat.sandbox.my.salesforce.com`.



SEE ALSO:

[Salesforce Help: My Domain Login and Application URL Formats with Enhanced Domains](#) (can be outdated or unavailable during release preview)

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

View and Manage Quotes Using the Your Account App

Salesforce account executives can now publish add-on quotes for Salesforce customers to review and sign in Your Account. Completed quotes are available to view and download. Previously, Salesforce customers couldn't access quotes in Your Account.

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

Who: Users need the Manage Billing permission or the Your Account App Admin permission set.

Why: This feature lets Salesforce AEs make updates or changes to quotes and publish them to Your Account. Salesforce customers can then review, sign, approve, and place orders using the new Pending Quotes tab on the Contract Details page. The Completed Quotes tab lets users view and download completed quotes.

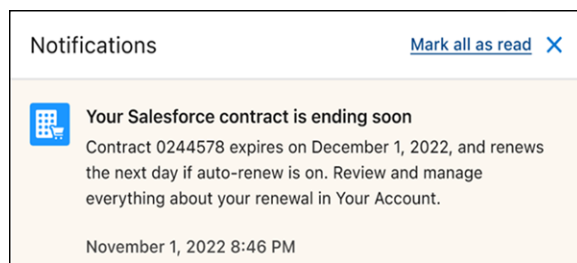
Get Your Account App Renewal Notifications

Your Account users can see updated notifications regarding their contract renewal and can manage their contracts in the Your Account app. Getting timely notifications helps users stay aware of the contracts where they must act to renew before expiration so contracts are always up to date.

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

Who: Users need the Manage Billing permission or the Your Account App Admin permission set.

Why: This feature alerts Your Account users when a contract is nearing its end date. After being notified, users can click the notification to manage the subscription renewal.



Give Billing Contacts Your Account App Access

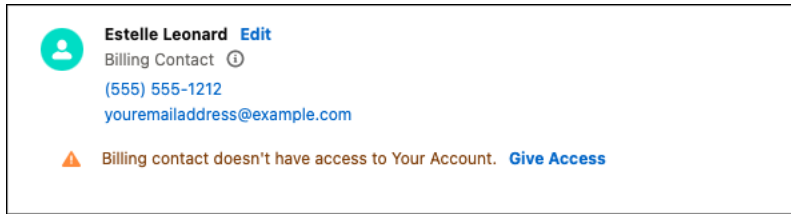
Make sure the billing contact on each Salesforce contract has access to the Your Account app by granting access from the Contract page. When you give billing contacts access to Your Account, users are given the permissions they must have to manage their billing and contracts.

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

Why: To better control the management of billing activities, purchasing of new products, and updating contracts, grant Your Account app access on the Contract page. Salesforce admins aren't required to create or update users outside of Your Account, saving additional steps.

How: When you give access to Your Account to your billing contact, one of two things happens.

- If the user doesn't exist, a user is created with an identity license when the account manager clicks **Give Access**. The user gets the Your Account App Admin permission set, which includes the Manage Billing permission.
- An existing user that matches the details of your billing contact is assigned the Your Account App Admin permission set, which includes the Manage Billing permission.



Salesforce Scheduler

Schedule video appointments with Amazon Chime. Enable service resources and customers to quickly view past and upcoming appointments. Use Omni-Channel service resources in Salesforce Scheduler. Show available service resources based on engagement channels. Explore many other enhancements in Salesforce Scheduler.

IN THIS SECTION:

[Schedule Video Appointments with Amazon Chime](#)

Salesforce Scheduler now provides integrated Amazon Chime for video calls. The feature operates in the Bring-Your-Own-Application (BYOA) model and requires that you have an Amazon Chime account. After you enable and configure video call settings, Salesforce Scheduler uses Amazon Chime for all its video appointments. Salesforce Scheduler also provides Virtual Appointment Email Templates that you can use to send notifications to unauthenticated users for their upcoming video appointments. This feature is available in the Salesforce Lightning Console and Experience Cloud sites, but isn't available for APIs.

[View Past and Upcoming Appointments Using My Appointments Calendar](#)

Service resources and customers can view their upcoming and past appointments using the My Appointments micro calendar console in Salesforce Lightning Console and using a component on Experience Cloud sites. Using the micro calendar console or the component, they can navigate to service appointment details and join video calls. The My Appointments component is available only in Experience Cloud sites created using the Build Your Own Template (Aura) template.

[Use Omni-Channel Service Resources in Salesforce Scheduler](#)

Schedule appointments for Omni-Channel service resources with the Agent resource type from Salesforce Scheduler. When a user has multiple service resource records, you can specify which service resource record to use for scheduling appointments. Salesforce Scheduler considers the service resource record that you specify as Main for scheduling appointments.

[Other Changes to Salesforce Scheduler](#)

Learn about other small but important improvements to Salesforce Scheduler.

Schedule Video Appointments with Amazon Chime

Salesforce Scheduler now provides integrated Amazon Chime for video calls. The feature operates in the Bring-Your-Own-Application (BYOA) model and requires that you have an Amazon Chime account. After you enable and configure video call settings, Salesforce Scheduler uses Amazon Chime for all its video appointments. Salesforce Scheduler also provides Virtual Appointment Email Templates that you can use to send notifications to unauthenticated users for their upcoming video appointments. This feature is available in the Salesforce Lightning Console and Experience Cloud sites, but isn't available for APIs.

Where: This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions where Salesforce Scheduler is enabled with the Video Calls Add-On license.



Note: For Health Cloud customers using Salesforce Scheduler, video calls are currently available to customers in Australia, Spain, United Kingdom, and the United States.

How: From Setup, in the Quick Find box, enter *Video Call*, and then select **Video Call Settings**. Add the required configurations using the Video Call Configuration page. After enabling and configuring video call settings, on the App Manager page, edit the Salesforce Scheduler Setup app to add the Video Call and My Appointments utility items.

SEE ALSO:

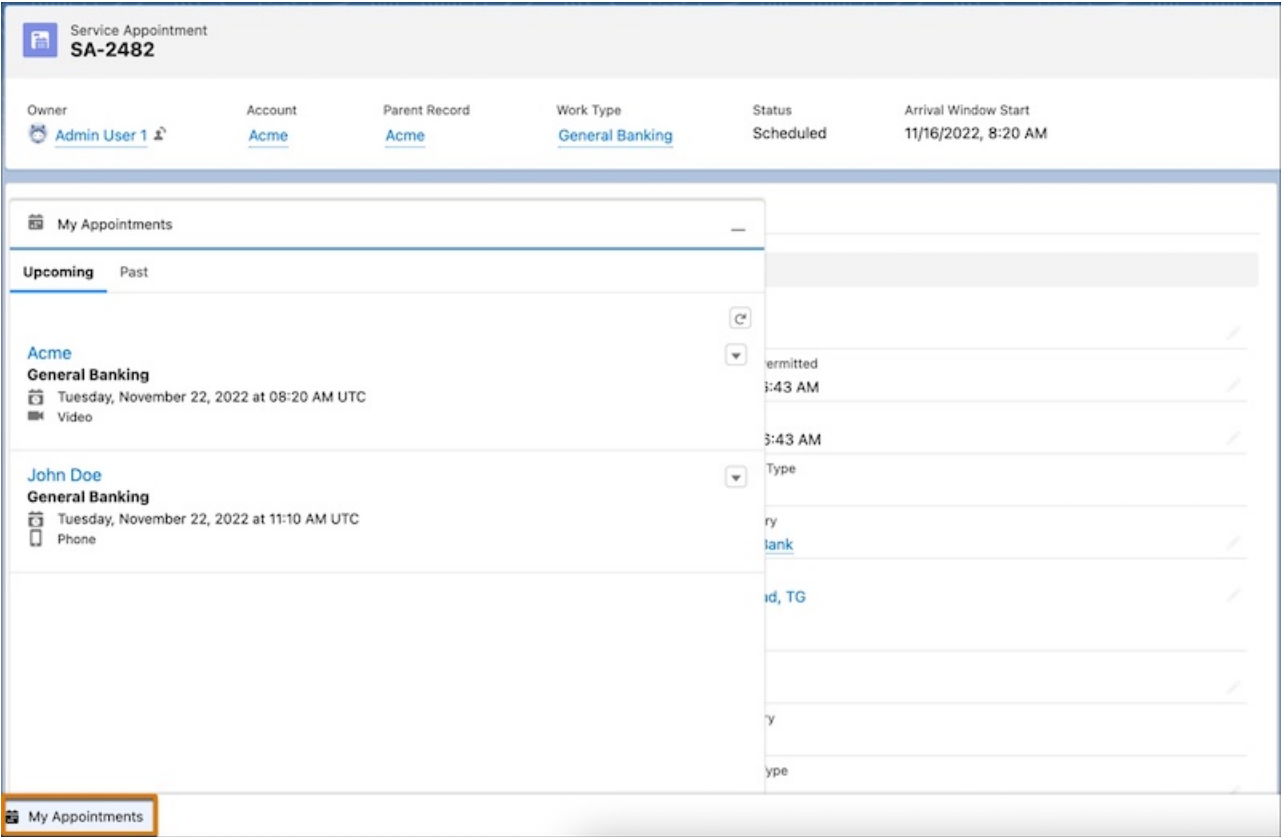
[Salesforce Scheduler Help: Set Up Video Appointments with Amazon Chime \(can be outdated or unavailable during release preview\)](#)

View Past and Upcoming Appointments Using My Appointments Calendar

Service resources and customers can view their upcoming and past appointments using the My Appointments micro calendar console in Salesforce Lightning Console and using a component on Experience Cloud sites. Using the micro calendar console or the component, they can navigate to service appointment details and join video calls. The My Appointments component is available only in Experience Cloud sites created using the Build Your Own Template (Aura) template.

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

How: For Lightning Console, from Setup, open App Manager. Edit the Salesforce Scheduler Setup app, and then add the My Appointments utility item. For Experience Cloud sites, add the My Appointments component to your site.



SEE ALSO:

[Salesforce Scheduler Help: Set Up Video Appointments with Amazon Chime \(can be outdated or unavailable during release preview\)](#)

Use Omni-Channel Service Resources in Salesforce Scheduler

Schedule appointments for Omni-Channel service resources with the Agent resource type from Salesforce Scheduler. When a user has multiple service resource records, you can specify which service resource record to use for scheduling appointments. Salesforce Scheduler considers the service resource record that you specify as Main for scheduling appointments.

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, enable **Main Service Resource**. On the service resource record that you want to use for scheduling appointments, select **Main**.

SEE ALSO:

[Salesforce Scheduler Help: Enable the Main Service Resource Setting \(can be outdated or unavailable during release preview\)](#)

Other Changes to Salesforce Scheduler

Learn about other small but important improvements to Salesforce Scheduler.

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

Show Available Service Resources Based on Engagement Channels

When you enable the Schedule Appointments Using Engagement Channels setting, Salesforce Scheduler considers engagement channels instead of appointment types in Salesforce Scheduler flows. To show services resources based on the selected engagement channel, associate engagement channels with shifts and work types. Keep in mind that engagement channels work only with shifts.

View Updated Parent Record in Service Appointments

When a lead is converted or when accounts are merged, Salesforce Scheduler updates the Parent Record field for all the associated service appointments and the Related To field for all associated Salesforce calendar events. When a lead is converted to an account or a person account with an opportunity, Salesforce Scheduler updates the parent record and the Related To field to the opportunity record. When a lead is converted to an account or a person account without an opportunity, Salesforce Scheduler updates the parent record and the Related To field to the account or person account. Similarly, when you merge two accounts or potential duplicate accounts, Salesforce Scheduler updates the parent record of service appointments to the principal account of the merged accounts.

Show Relevant Service Territories to Customers

Declutter the Select Service Territory screen using the Filter by Service Territory IDs flow attribute. Enter a comma-separated list of service territory IDs of the service territories that you want to show on the Select Service Territory screen.

Outbound New Appointment

Select Service Territory

Select Service Territory

No preview is available for this component.

Previous Finish

Select Service Territory

Distance:

Distance Unit:

Filter by Resource IDs:

Filter by Service Territory IDs:

Hide Operating Hours:

Define Start Time Intervals for Work Types

Set non-overlapping time slots for each work type by specifying start time intervals for work types. To specify the start time interval for a work type, use the Appointment Start Time Interval (Mins) field on the work type record. If you don't specify a start time interval value for work type, Salesforce Scheduler considers the value specified in the Default Scheduling Policy.

View Account Information in Service Appointment for a Case

When you book a service appointment for a case record with an associated account, the account name is now available in the Account field of the related service appointment.

SEE ALSO:

[Salesforce Scheduler Help: How Salesforce Scheduler Tracks Appointments \(can be outdated or unavailable during release preview\)](#)

Einstein Search

Get results geared toward how you work. With Search Manager, you configure your searchable fields, even picklists, to see information related to your work. You can also receive specific answers from a knowledge article to help answer your questions with Einstein Search Answers. With the help of our new Einstein Search Learning Map, you can quickly onboard to what Einstein Search has to offer.

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IN THIS SECTION:

[Configure Searchable Fields for Each User Profile \(Beta\)](#)

Help your team get results related to their work by configuring all your searchable fields for each user profile. In Search Manager, you can now edit the fields to make them searchable or not searchable for each user profile.

[Quickly Configure Searchable Picklists \(Beta\)](#)

Skip the additional workflows. You can now select a picklist field to be searchable in Search Manager. Picklist offers a selection of options available for a specific field in a Salesforce object, such as a list of regions, so that users get the most relevant results.

[Increase Case Resolution with Einstein Search Answers \(Pilot\)](#)

Einstein Search Answers instantly extracts relevant text from a knowledge article to speed up case resolution. You can also interact with the answers and copy the link or answer to your clipboard.

[Strengthen Your Search Productivity with the Einstein Search Learning Map](#)

Use the new learning map in Salesforce Help to get familiar with the Einstein Search AI-powered search bar. Each section highlights what search offers, how it works, and how to personalize your results. Explore how you can make the most of your search bar.

SEE ALSO:

[Einstein Release Notes](#)

Configure Searchable Fields for Each User Profile (Beta)

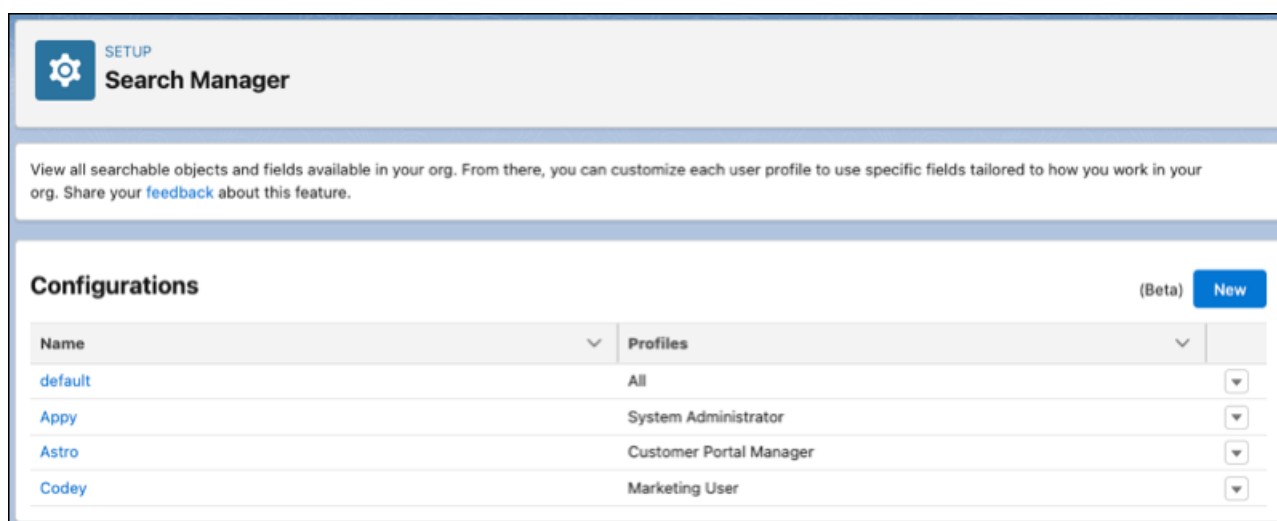
Help your team get results related to their work by configuring all your searchable fields for each user profile. In Search Manager, you can now edit the fields to make them searchable or not searchable for each user profile.

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



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

How: From Search Manager in Setup, create a configuration setting and edit the fields to make them searchable or not searchable for each user profile.



SEE ALSO:

[Salesforce Help: Configure Your Users Fields \(Beta\) \(can be outdated or unavailable during release preview\)](#)

Quickly Configure Searchable Picklists (Beta)

Skip the additional workflows. You can now select a picklist field to be searchable in Search Manager. Picklist offers a selection of options available for a specific field in a Salesforce object, such as a list of regions, so that users get the most relevant results.

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

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


SEE ALSO:

[Salesforce Help: Configure Your Users Fields \(Beta\) \(can be outdated or unavailable during release preview\)](#)

Increase Case Resolution with Einstein Search Answers (Pilot)

Einstein Search Answers instantly extracts relevant text from a knowledge article to speed up case resolution. You can also interact with the answers and copy the link or answer to your clipboard.

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.

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

Who: To participate in Einstein Search Answers, email tryeinsteinsearch@salesforce.com and ask your Salesforce Admin to turn on **Einstein Search Answers from Knowledge Object**. This feature activates 24 hours after it's turned on.

SEE ALSO:

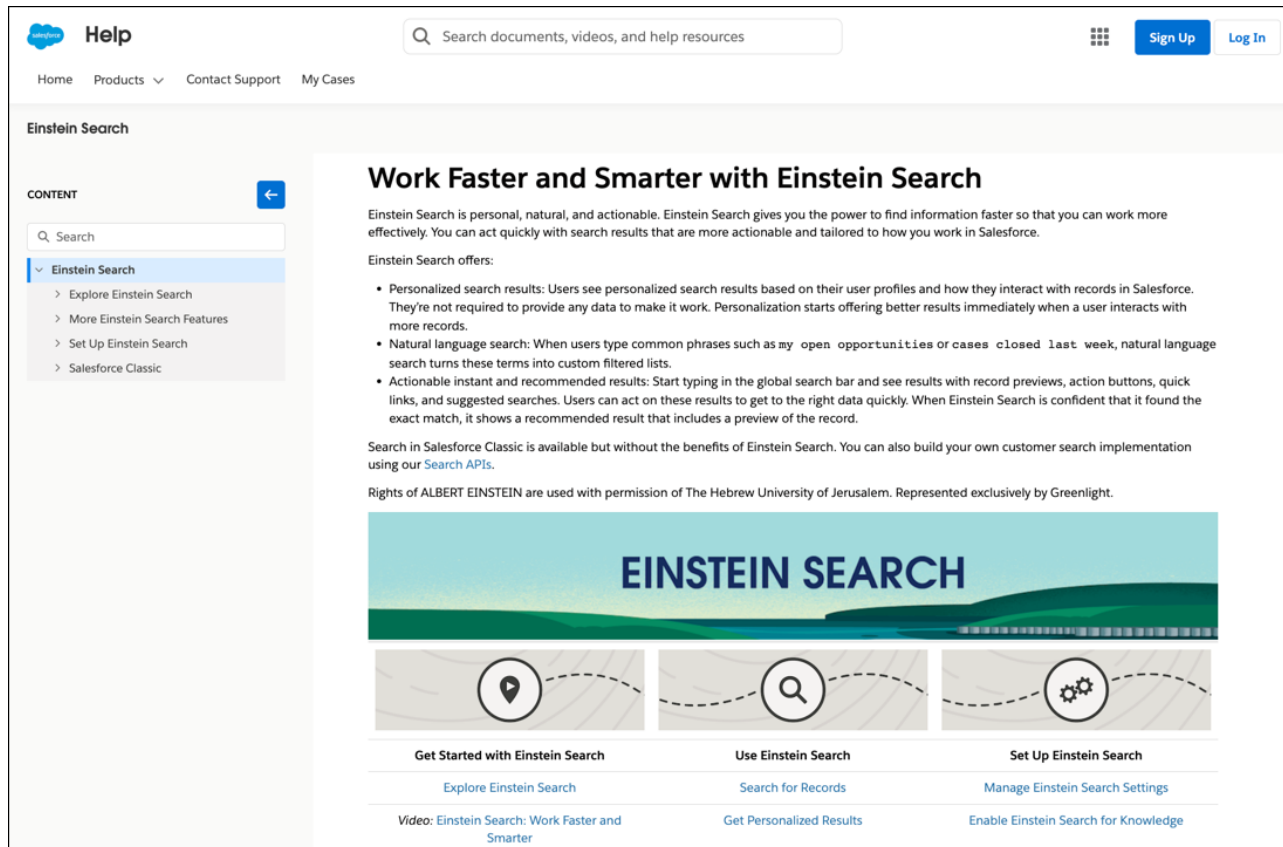
[Salesforce Help: Enable Einstein Search for Knowledge \(can be outdated or unavailable during release preview\)](#)

Strengthen Your Search Productivity with the Einstein Search Learning Map

Use the new learning map in Salesforce Help to get familiar with the Einstein Search AI-powered search bar. Each section highlights what search offers, how it works, and how to personalize your results. Explore how you can make the most of your search bar.

Where: This change applies to Salesforce Help.

How: Explore the Einstein Search Learning Map in Salesforce Help.



SEE ALSO:

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

Analytics

Personalize Lightning reports with relative user filters. Report on Analytics subscription schedules, recipients, and attachments. In CRM Analytics, refresh templated apps with one click and navigate through dashboard pages with single-click interactions. Get Einstein Discovery predictions and recommendations in Revenue Intelligence. Give recipients more view options in Slack when you share assets using link unfurling.

IN THIS SECTION:

[Reports and Dashboards](#)

Lightning reports and dashboards are more relevant and engaging with the addition of relative user filters, image and text widgets, more subscriptions and dashboard filters, and enhanced organization.

[CRM Analytics](#)

Templated apps are as fresh as a spring breeze with orchestrated app data refreshes and automatic upgrades. Streamline dashboard engagement with single-click navigation and the more efficient compact form 2.0. Stay organized and connected with enhancements to collections and Slack sharing. Refocus your advanced analytics with models (not stories) in Einstein Discovery.

Reports and Dashboards

Lightning reports and dashboards are more relevant and engaging with the addition of relative user filters, image and text widgets, more subscriptions and dashboard filters, and enhanced organization.

IN THIS SECTION:

[Create Personalized Report Filters](#)

Set up a single dynamic report filter that displays personalized results for each user. For example, create an opportunity report for your sales team with a single Opportunity Owner filter that personalizes the results for each member of the team.

[Stay Informed on Dashboard and Report Subscriptions](#)

You're no longer in the dark about which reports, dashboards, or other analytic assets your users are subscribed to. Manage data access by determining what kind of attachments are sent, who receives them, and who the running user is. Stay on top of scheduling and limits with a quick report showing when subscriptions run and who set them up. Create a custom report type on Analytic Notifications to view the source, owner, running user, and schedule of subscriptions.

[Subscribe to More Reports and Dashboards](#)

Get more actionable reports and dashboards delivered to your inbox on schedule and with the latest data. Each user in an Unlimited Edition org can now subscribe to up to 15 reports and 15 dashboards. The previous limit was 7 reports and 7 dashboards.

[Stay in Lightning Experience When Working with Reports](#)

The Lightning Report Builder now has all the features of Salesforce Classic, so you don't need to go back to Classic to access any report features.

[Get Improved Report Performance with On-Demand Inline Field Editing](#)

Reports now load quicker because fields aren't automatically editable. When you want to edit record details, turn on inline field editing with the click of a button. Inline field editing is turned off when you refresh the tab.

[Stay Organized by Adding Reports and Dashboards to Collections \(Beta\)](#)

Use collections to organize the reports and dashboards that you care about, even if they exist in multiple folders. Add Lightning reports and dashboards, such as those related to a project or commonly used, for immediate access in Unified Home. Pin important collections to your home page, hide irrelevant collections, and share collections with others.

[Preview Assets in Your Collections \(Beta\)](#)

Use asset previews to get a glimpse of what an asset is about. Collections now include additional context to make it easier for users to decide which items are relevant or require attention.

[Access Optimal Views on Mobile with Enhanced Reports \(Generally Available\)](#)

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 Report Types by Objects or Fields \(Generally Available\)](#)

Quickly find report types that include selected Salesforce objects or specific Salesforce fields. You can filter report types by up to 20 objects or fields to ensure that the report contains the data you need.

[Enhance Lightning Dashboards with Text and Graphics \(Beta\)](#)

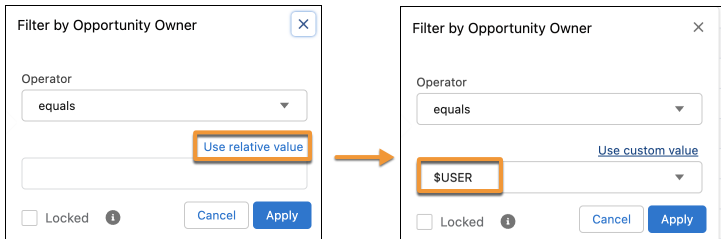
Explain charts, describe metrics and KPIs, and clarify tables with rich text right in context. Add company logos and branding, flow diagrams, and embedded images. Guide users through their data with section titles, narrative text, and even animated GIFs.

Create Personalized Report Filters

Set up a single dynamic report filter that displays personalized results for each user. For example, create an opportunity report for your sales team with a single Opportunity Owner filter that personalizes the results for each member of the team.

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

How: When setting up a filter on a user field, such as Opportunity Owner or Created By, select the relative value option. The filter value changes to the currently signed-in user. This feature is supported only for user-related fields such as Username and Owner fields.



Stay Informed on Dashboard and Report Subscriptions

You’re no longer in the dark about which reports, dashboards, or other analytic assets your users are subscribed to. Manage data access by determining what kind of attachments are sent, who receives them, and who the running user is. Stay on top of scheduling and limits with a quick report showing when subscriptions run and who set them up. Create a custom report type on Analytic Notifications to view the source, owner, running user, and schedule of subscriptions.

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

How: Use the report to manage subscriptions for Lightning reports and dashboards, collections, CRM Analytics lenses, and dashboards in Slack. Review conditions for notifications from CRM Analytics dashboard widgets and Einstein Discovery model quality alerts.

Joined Report Subscriptions Report									
Subscriptions with Actions					Subscription Conditions				
Subscriptions with Actions block 1					Subscription Conditions block 1				
Owner: User ID	Analytic Notification ID	Owner: Full Name	Source	Threshold Type	Action Type	Schedule Cron Expression	Aggregate Column Name	Operation	Value
005RM000000B8cDe	0AuRM0000000AAAAa	Linda Rosenberg	Lightning Report Subscription	On Schedule	Send Email	0 0 12 L * 1 ?	-	-	-
	0AuRM0000000AAAAb	Linda Rosenberg	CRM Analytics Widget Notification	On Condition	Notify Me	0 0 0 7 * 2,3,4,5,6	count	Equals	1
	0AuRM0000000AAAAc	Linda Rosenberg	Lightning Dashboard Subscription	On Schedule	Send Email	0 0 14 7 * 2	-	-	-
	0AuRM0000000AAAAd	Linda Rosenberg	CRM Analytics Widget Notification	On Condition	Notify Me	0 0 0 7 * 2,3,4,5,6	sales_pending	Greater Than	9

SEE ALSO:

[Salesforce Help: Report on Subscriptions and Notifications \(can be outdated or unavailable during release preview\)](#)

Subscribe to More Reports and Dashboards

Get more actionable reports and dashboards delivered to your inbox on schedule and with the latest data. Each user in an Unlimited Edition org can now subscribe to up to 15 reports and 15 dashboards. The previous limit was 7 reports and 7 dashboards.

Where: This change applies to Lightning Experience in the Unlimited Edition.

How: If you have a different edition and want to increase your subscription limit, contact *Salesforce Customer Support*.

Stay in Lightning Experience When Working with Reports

The Lightning Report Builder now has all the features of Salesforce Classic, so you don't need to go back to Classic to access any report features.

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

How:

To simplify your experience, we made these changes.

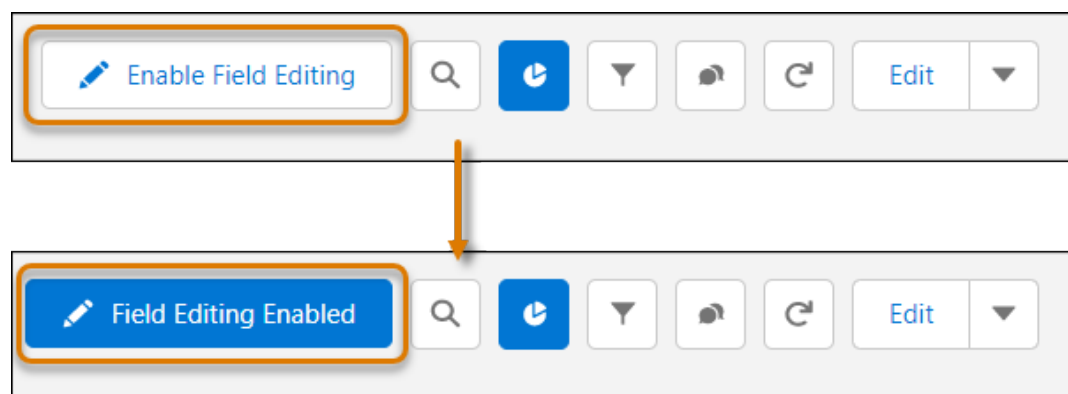
- The Reports tab no longer has the New Report (Salesforce Classic) button.
- The Edit in Classic option has been removed.
- The Get Feedback button has been removed from the Lightning Report Builder. The button was used to collect feedback on gaps between the Lightning and Classic report builders.

Get Improved Report Performance with On-Demand Inline Field Editing

Reports now load quicker because fields aren't automatically editable. When you want to edit record details, turn on inline field editing with the click of a button. Inline field editing is turned off when you refresh the tab.

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

How: To edit field values in a report, click **Enable Field Editing**. The indicator changes to **Field Editing Enabled**.



SEE ALSO:

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

Stay Organized by Adding Reports and Dashboards to Collections (Beta)

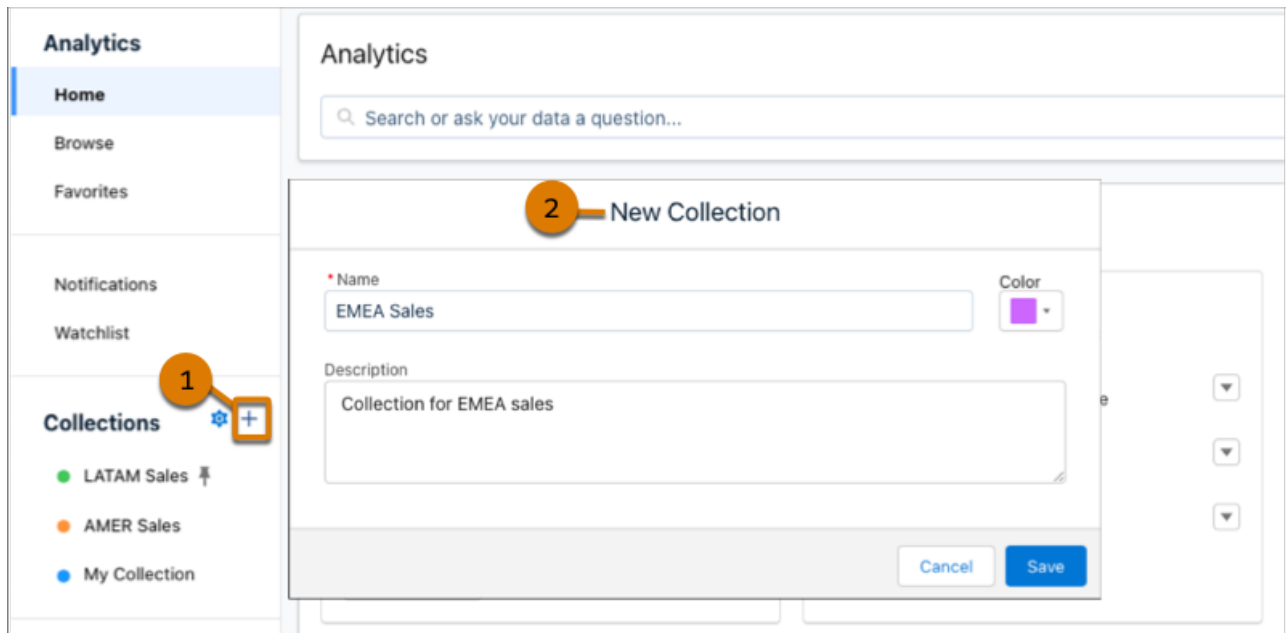
Use collections to organize the reports and dashboards that you care about, even if they exist in multiple folders. Add Lightning reports and dashboards, such as those related to a project or commonly used, for immediate access in Unified Home. Pin important collections to your home page, hide irrelevant collections, and share collections with others.

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

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

How: From Setup, in the Quick Find box, enter *Reports*, and then select **Reports and Dashboards Settings**. Select **Enable the Unified Experience for Analytics Home**. This feature can also be enabled or disabled on orgs that have CRM Analytics through Analytics settings.

From the App Launcher, select **Analytics**. In the Collections panel on Unified Home, click + (1). In the New Collection window (2), enter the collection name and optional description.



SEE ALSO:

[Salesforce Help: Curate and Share Insights with Collections \(can be outdated or unavailable during release preview\)](#)

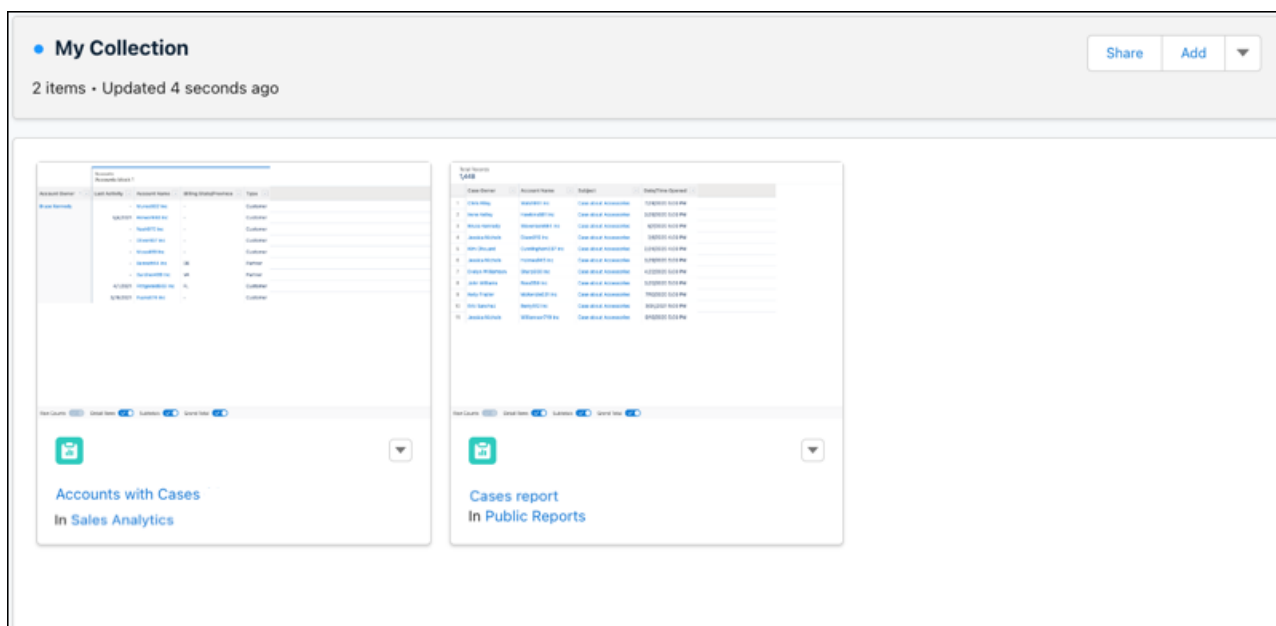
Preview Assets in Your Collections (Beta)

Use asset previews to get a glimpse of what an asset is about. Collections now include additional context to make it easier for users to decide which items are relevant or require attention.

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

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

How: From Setup, in the Quick Find box, enter *Reports*, and then select **Reports and Dashboards Settings**. Select **Show preview thumbnails for reports and Lightning dashboards**.



SEE ALSO:

[Stay Organized by Adding Reports and Dashboards to Collections \(Beta\)](#)

Access Optimal Views on Mobile with Enhanced Reports (Generally Available)

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.

When: Enhanced Reports are available February 13, 2023, for iOS and Android mobile devices.

SEE ALSO:

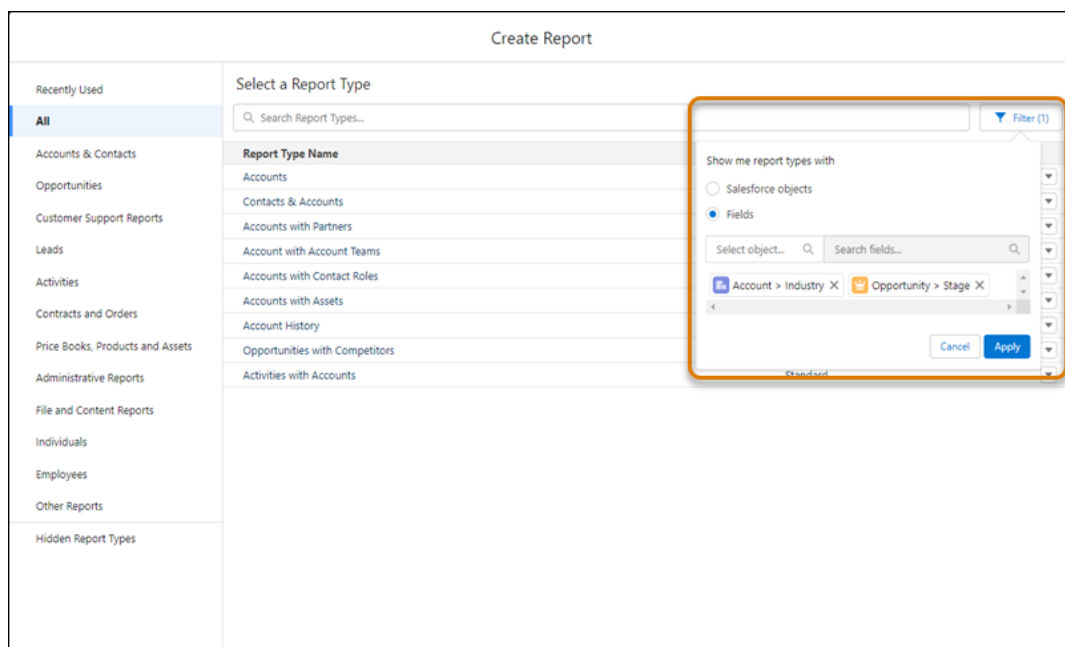
[Get Optimized Mobile Reports with Enhanced Reports \(Generally Available\)](#)

Filter Report Types by Objects or Fields (Generally Available)

Quickly find report types that include selected Salesforce objects or specific Salesforce fields. You can filter report types by up to 20 objects or fields to ensure that the report contains the data you need.

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

How: To see this in action, create a report. In the Create Report window, click **Filter**. Select either **Salesforce objects** or **Fields** and search. Fields included via lookup or part of composite fields (such as geolocation or address) aren't available as filter options.



Enhance Lightning Dashboards with Text and Graphics (Beta)

Explain charts, describe metrics and KPIs, and clarify tables with rich text right in context. Add company logos and branding, flow diagrams, and embedded images. Guide users through their data with section titles, narrative text, and even animated GIFs.

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



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: To enable this feature, contact Salesforce Support.

CRM Analytics

Templated apps are as fresh as a spring breeze with orchestrated app data refreshes and automatic upgrades. Streamline dashboard engagement with single-click navigation and the more efficient compact form 2.0. Stay organized and connected with enhancements to collections and Slack sharing. Refocus your advanced analytics with models (not stories) in Einstein Discovery.

IN THIS SECTION:

[Analytics Data Integration](#)

Analyze Security Center objects with data sync support.

[Analytics Prebuilt Apps](#)

Ensure that your CRM Analytics templated apps are running with current data by refreshing an entire app with one click. To simplify app upgrades, CRM Analytics automatically upgrades the following apps: Customer Insights App, Design App, Learning Adventure app.

[Analytics App Building](#)

Create a flow to move between dashboard pages with a single click. Edit interactions (bindings) in queries. Use compact form 2.0, the new representation of queries within JSON, which is built to efficiently handle multiple datasets and different data sources. Save your Customer Data Platform explorations and share them with others.

[Einstein Discovery](#)

Stories are now models. Get Einstein Discovery predictions and recommendations in Revenue Intelligence. Join the Decision Optimization pilot to improve recommendations. See the estimated run time of your models. Use custom text to make Einstein easier to understand.

[CRM Analytics for Everyone](#)

Add Lightning reports and dashboards to collections, pin and hide collections on the Analytics Home page, and preview assets within collections. Provide more options for recipients when you send analytics links with Slack link unfurling. Include a snapshot of the dashboard widget with your CRM Analytics notifications in Slack.

Analytics Data Integration

Analyze Security Center objects with data sync support.

IN THIS SECTION:

[Connect Security Center and CRM Analytics with Data Sync](#)

Analyze Security Center data in CRM Analytics without manually uploading CSVs. Security Center objects can now be directly synced through the Salesforce Local connector in data sync.

[Use New Multivalue Formulas in Your Recipes](#)

Use new multivalue functions in Data Prep's formula transformation to handle duplicate values and find specific values. For example, view the values with or without duplicates, remove duplicate values, or find a value at a given index.

Connect Security Center and CRM Analytics with Data Sync

Analyze Security Center data in CRM Analytics without manually uploading CSVs. Security Center objects can now be directly synced through the Salesforce Local connector in data sync.

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

Who: This change is available to users with CRM Analytics and the Security Center add-on subscription.


SEE ALSO:

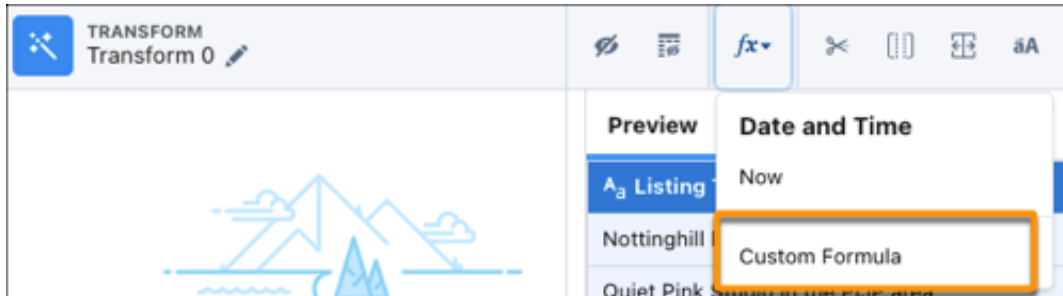
[Execute CRM Analytics Features on Security Center Data](#)

Use New Multivalue Formulas in Your Recipes

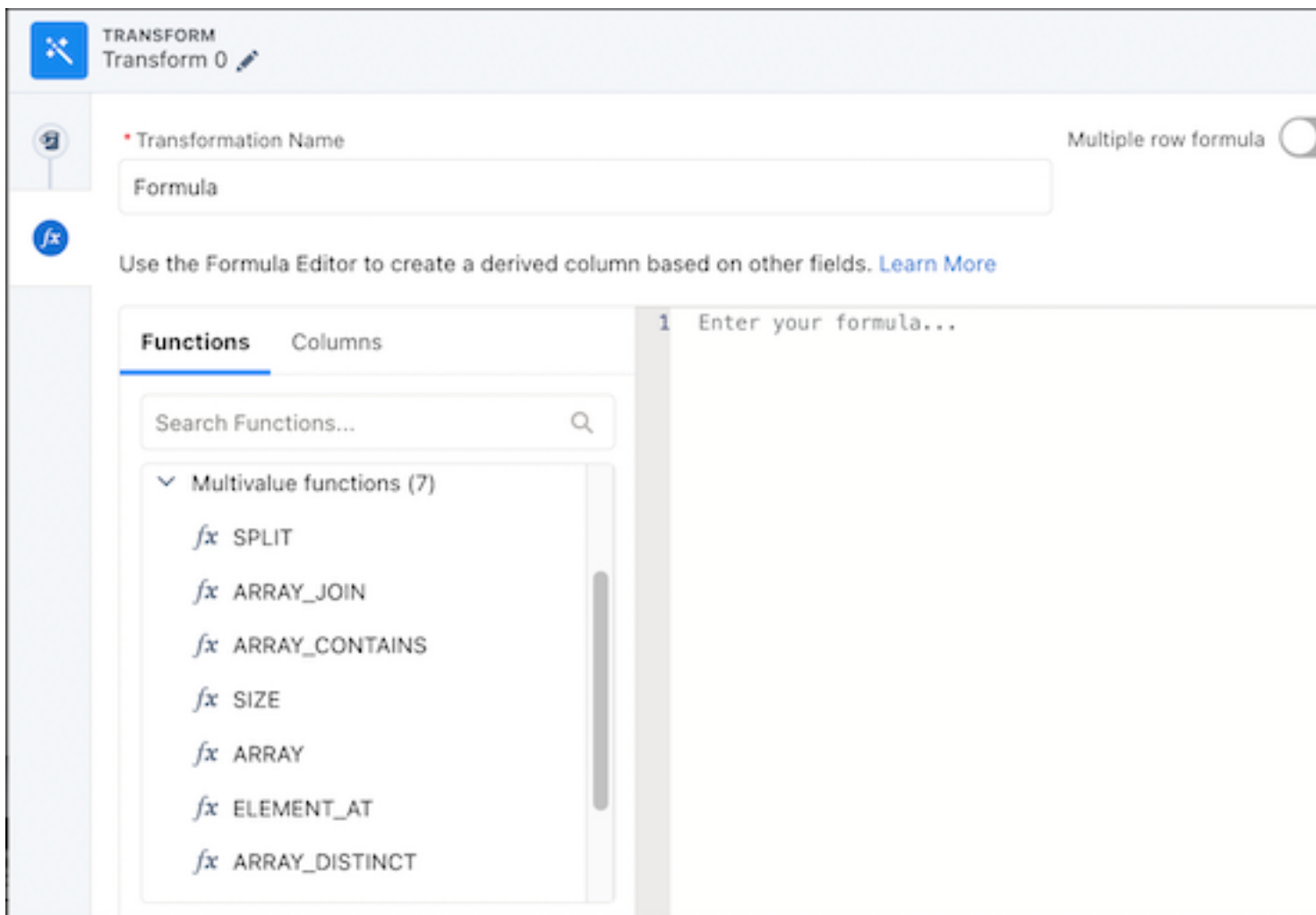
Use new multivalue functions in Data Prep's formula transformation to handle duplicate values and find specific values. For example, view the values with or without duplicates, remove duplicate values, or find a value at a given index.

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

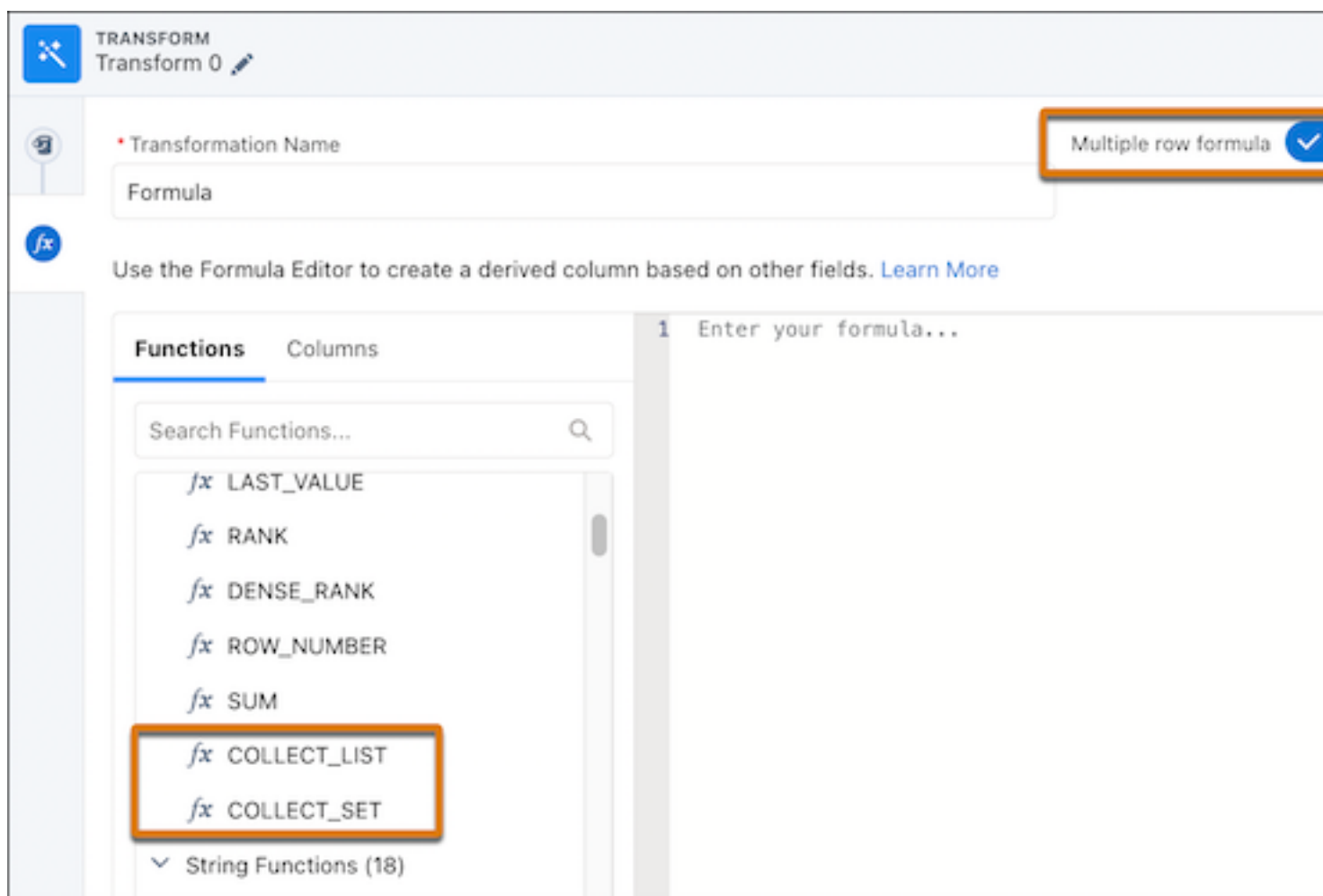
How: In a Data Prep recipe transform node, use the toolbar to select Formula (), and then select **Custom Formula**.



To use the `ELEMENT_AT` and `ARRAY_DISTINCT` functions, choose a multivalue function. These functions return an element of a multivalue at a given index or remove duplicates from the multivalue.



To use the `COLLECT_LIST` and `COLLECT_SET` functions, toggle **Multiple row formula** on and choose a window function. These functions return a multivalue with or without duplicates.



SEE ALSO:

[Salesforce Help: Multivalue Functions for Formulas \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Window Functions for Formulas \(can be outdated or unavailable during release preview\)](#)

Analytics Prebuilt Apps

Ensure that your CRM Analytics templated apps are running with current data by refreshing an entire app with one click. To simplify app upgrades, CRM Analytics automatically upgrades the following apps: Customer Insights App, Design App, Learning Adventure app.

IN THIS SECTION:

[Refresh Templated Analytics App Data with One Click](#)

Ensure that your CRM Analytics templated apps are running with current data by refreshing an entire app with one click. You can also schedule automatic app refreshes. Gone are the days of finding individual app assets and working out how to schedule them in the right order. An app refresh runs all the data assets associated with the app in the required order, including recipes, dataflows, connectors, Einstein Discovery models, and prediction definitions.

Get Automated App Upgrades

CRM Analytics now automatically upgrades the following auto-installed apps: Customer Insights, Design App, Learning Adventure app. The upgrade deletes the previous versions, along with customizations. You can also disable this auto-upgrade feature.

Improve Your Team Members' Efficiency

Use the new Team Performance dashboard to analyze the performance of your team members based on efficiency in completing assigned tasks. View task completion status, assess individual performance based on team average, and identify team members who need attention. You can create the app in Analytics Studio by using the Analytics for Communications - Order Tracking template.

Customize Dashboards and Manage Revenue Better

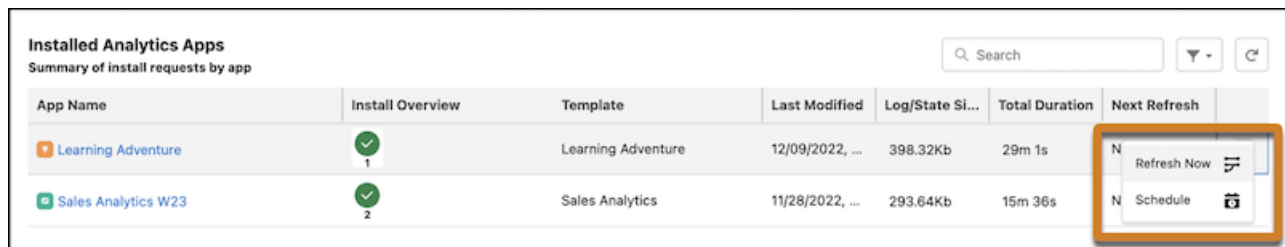
Use the new Revenue Management for Financial Services Cloud app to track and manage revenue for multiple sales processes. The app adapts to nuances of opportunity management within the financial service industry and is easily customizable. Quickly build customized dashboards for the app using the app's prepackaged component library. You can create the app in Analytics Studio by using the Revenue Management for Financial Services Cloud template.

Refresh Templated Analytics App Data with One Click

Ensure that your CRM Analytics templated apps are running with current data by refreshing an entire app with one click. You can also schedule automatic app refreshes. Gone are the days of finding individual app assets and working out how to schedule them in the right order. An app refresh runs all the data assets associated with the app in the required order, including recipes, dataflows, connectors, Einstein Discovery models, and prediction definitions.

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

How: From Setup, in the Quick Find box, enter *App Install History*, and then select **App Install History**. Look for the app that you want to refresh or create a schedule for.



App Name	Install Overview	Template	Last Modified	Log/State Si...	Total Duration	Next Refresh
Learning Adventure	1	Learning Adventure	12/09/2022, ...	398.32Kb	29m 1s	Refresh Now
Sales Analytics W23	2	Sales Analytics	11/28/2022, ...	293.64Kb	15m 36s	Schedule

To run data-related assets for your app immediately, from the app's actions, select **Refresh Now**. The app template runs all the data syncs and refreshes all assets in the correct sequence. To schedule regular data refreshes, select **Schedule**. When you create a schedule, the refresh runs according to the time zone of the user who set the schedule.

SEE ALSO:

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

Get Automated App Upgrades

CRM Analytics now automatically upgrades the following auto-installed apps: Customer Insights, Design App, Learning Adventure app. The upgrade deletes the previous versions, along with customizations. You can also disable this auto-upgrade feature.

Where: This change applies to specific templated apps created by Salesforce in Analytics Studio.

Who: Templated apps are available for CRM Growth and CRM Plus users.

How: To disable auto-upgrade in Setup, go to **Apps > Auto-installed apps**.

Improve Your Team Members' Efficiency

Use the new Team Performance dashboard to analyze the performance of your team members based on efficiency in completing assigned tasks. View task completion status, assess individual performance based on team average, and identify team members who need attention. You can create the app in Analytics Studio by using the Analytics for Communications - Order Tracking template.

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 Analytics for Communications - Order Tracking template, you need the CRMA for Comms App license.

Customize Dashboards and Manage Revenue Better

Use the new Revenue Management for Financial Services Cloud app to track and manage revenue for multiple sales processes. The app adapts to nuances of opportunity management within the financial service industry and is easily customizable. Quickly build customized dashboards for the app using the app's prepackaged component library. You can create the app in Analytics Studio by using the Revenue Management for Financial Services Cloud template.

Where: This feature is available in CRM Analytics in Lightning Experience and Salesforce Classic where FSC-Managed Package is installed. CRM Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

Who: To create the Revenue Management for Financial Services Cloud app, you need the RI for Fins Admin permission set. To access the Revenue Intelligence for Financial Services app, you need the RI for Fins User permission set.

Analytics App Building

Create a flow to move between dashboard pages with a single click. Edit interactions (bindings) in queries. Use compact form 2.0, the new representation of queries within JSON, which is built to efficiently handle multiple datasets and different data sources. Save your Customer Data Platform explorations and share them with others.

IN THIS SECTION:

[Move Through Dashboards with a Single Click \(Generally Available\)](#)

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 navigates dynamically to the detailed information that you need. Interactions are available for chart, text, repeater, and table widgets.

[Write Powerful Queries in Compact Form 2.0 \(Generally Available\)](#)

Compact form 2.0, the new representation of queries with JSON, is built for efficiently handling multiple datasets and different data sources, such as Customer Data Platform and Snowflake. Work with advanced features, such as data blending, interactions on columns and column maps, and window functions in compare tables, in a more robust and secure framework. This feature is now generally available.

[Publish Tableau Content to CRM Analytics \(Beta\)](#)

Gain insights on Tableau Cloud and Tableau Server data from the comfort of CRM Analytics Home. Easily publish Tableau Cloud and Tableau Server dashboards, sheets, and stories to a CRM Analytics app or Lightning page without first embedding Tableau views or installing additional software. Combine Tableau Cloud and Tableau Server views with CRM Analytics content in a single dashboard, apply Tableau filters to it, and share it with colleagues to keep them updated on the same data. To access the published Tableau content more easily, favorite the dashboard in Analytics Home.

Better Performance for Embedded Analytics Dashboards

Embedded Analytics dashboards are now rendered with native Lightning web components (LWC) instead of iframes. Using the native LWC framework improves user experience, dashboards load earlier and render faster. Windows opened from the embedded dashboard center on the Lightning Experience viewport and not on the iframe. The embedded dashboard is still the `AuraWaveWaveDashboard` component and how you embed dashboards hasn't changed.

Edit Queries That Contain Interactions

Queries that have interactions (bindings) are now editable. Rather than rebuilding the query, you can open a query to view it as a lens and validate results or add format changes, such as conditional formatting for emphasis.

Use the Input Widget in More Ways

You can now add the input widget to your formulas as a column or in SAQL. The input widget works as a data source by collecting user inputs for use in other parts of the dashboard, such as for a formula query. Previously, an interaction (binding) was the only way to retrieve an input value.

Migrate Conditional Formatting Assets

Updating dashboards with conditional formatting (assetXMD) and migrating them across orgs is now fully supported. Migration enhancements in CRM Analytics, including automated checks and process modifications, coordinate with packaging validation for a straightforward and successful org migration.

Improve Dashboard Accessibility with High-Contrast Colors

Dashboards now include high-contrast color themes for better readability. High-contrast color combinations help differentiate content from the surrounding dashboard and improve the experience for the end-user. Color schemes in logos, tooltips, and conditional formatting don't automatically adjust, so consider manually incorporating high-contrast colors when possible.

Highlight Important Content in Repeater Widgets with Conditional Formatting

Make key data in repeater widgets stand out by adding rules to format text, numbers, charts, or images. Previously, you could apply conditional formatting only to dynamic text in a repeater. Now you can define a separate rule for each widget in the repeater intuitively based on a value or range. The options available vary depending on the widget type. For example, on a text widget, you can apply a formatting rule to a field or the entire widget, while you can display symbols with conditional rules on an image widget.

Create Tooltips for Repeater Widgets

For a quick review of related data while reviewing metrics in a scrollable layout, add tooltips to a repeater. Now you can design a separate tooltip for text, numbers, images, and bullet, gauge, polar gauge or flat gauge charts in the repeater. The options available vary depending on the widget type. For example, on a number widget, you can choose a default or custom tooltip, while you can include custom text, data point details, and visualizations in a chart widget's tooltip.

Format Numbers in Charts to Your Liking

Take advantage of new formatting options for chart numbers in lenses and dashboards. Display the entire number value when precision is important, or the compact version for improved readability, or a percentage relative to the total value represented in the chart for easier comparisons.

Sort Pivot Tables by a Measure (Generally Available)

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. This feature, which is now generally available, includes an update since the last release. Previously, you could sort pivot tables by a measure only after manually switching to compact form 2.0.

View Subtotals in Pivot Tables (Generally Available)

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. This feature, which is now generally available, includes an update since the last release. Previously, you could view pivot table subtotals only after manually switching to compact form 2.0.

[Save and Share Single-Click Customer Data Platform Explorations](#)

Now you can save single-click explorations on calculated insights, data lake objects, and data models as a lens. Or, download query results as an image, Excel, or CSV file for future reference. To stay on top of your most important Customer Data Platform insights, add the lens to a collection. To let others review or deep-dive into your analysis, post your lens to Chatter, share its unique URL, or the collection that it belongs to.

[Power Queries on Calculated Insights with Fine-Tuned Metadata](#)

When you work with Calculated Insights in Customer Data Platform, CRM Analytics processes both the field and data type metadata. In the fields panel, you now see accurate options to aggregate, group, and filter data and perform calculations. With this improvement, you also avoid incorrect data operations as you build queries. For example, customer ranking in Calculated Insights is correctly identified as a non-aggregatable measure.

[Facet SOQL Queries on Related Salesforce Objects with Ease](#)

Surfacing trends between Salesforce objects with parent-child relationships is now easier. For example, on a dashboard that's set up to monitor Salesforce account records, you can track related opportunities and cases without code. Parent-child faceting between steps built on Salesforce objects is enabled by default on new dashboards.

[Apply Powerful Formulas and Functions to Direct Data](#)

Save time when you run complex calculations on data in Customer Data Platform, Snowflake, and Google BigQuery. Use the column editor to create text string formulas, work with math functions, or perform calculations across rows of data with windowing functions. Previously, you wrote custom SQL queries in CRM Analytics Direct Data.

[Other Enhancements to CRM Analytics App Building](#)

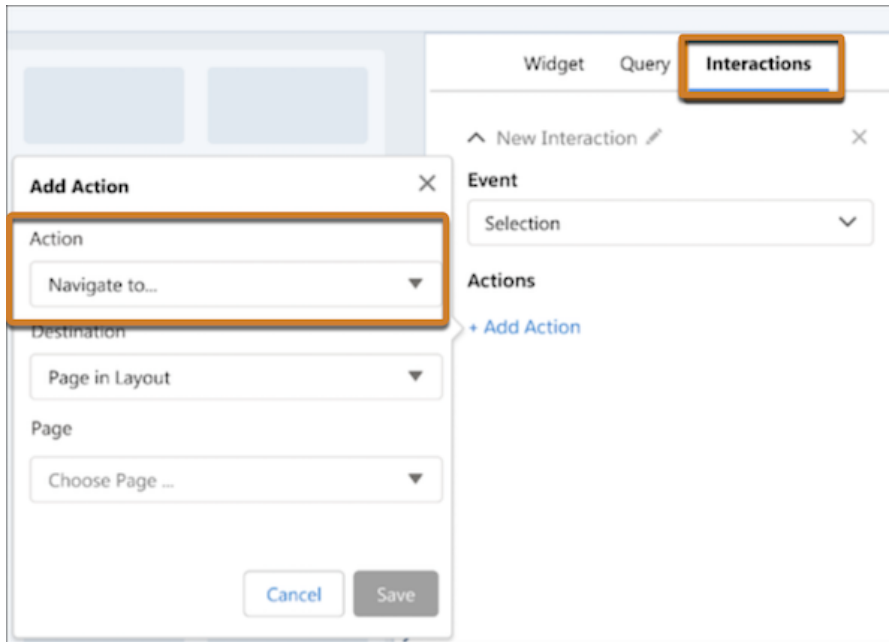
Learn about these enhancements to CRM Analytics lenses and dashboards.

Move Through Dashboards with a Single Click (Generally Available)

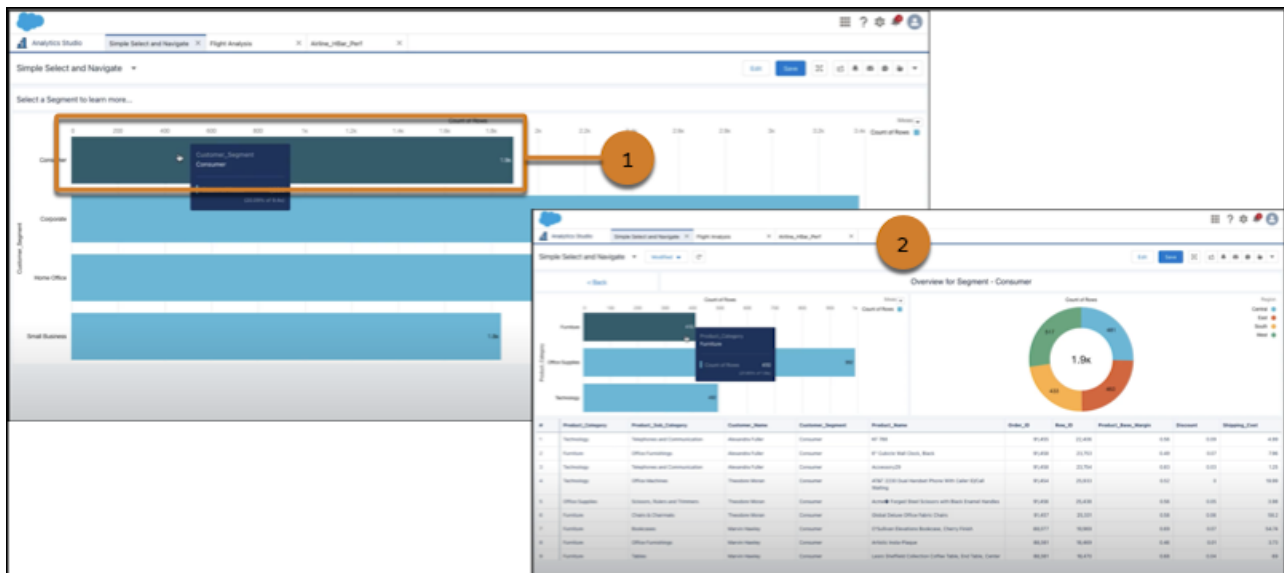
Create a flow to move between dashboard pages with a single click. For example, go directly to the specific opportunity details page from the account overview chart to see what your next steps are. The single click interaction navigates dynamically to the detailed information that you need. Interactions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

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

How: Say you want to navigate to a detailed view from a chart widget. Select the 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).




SEE ALSO:

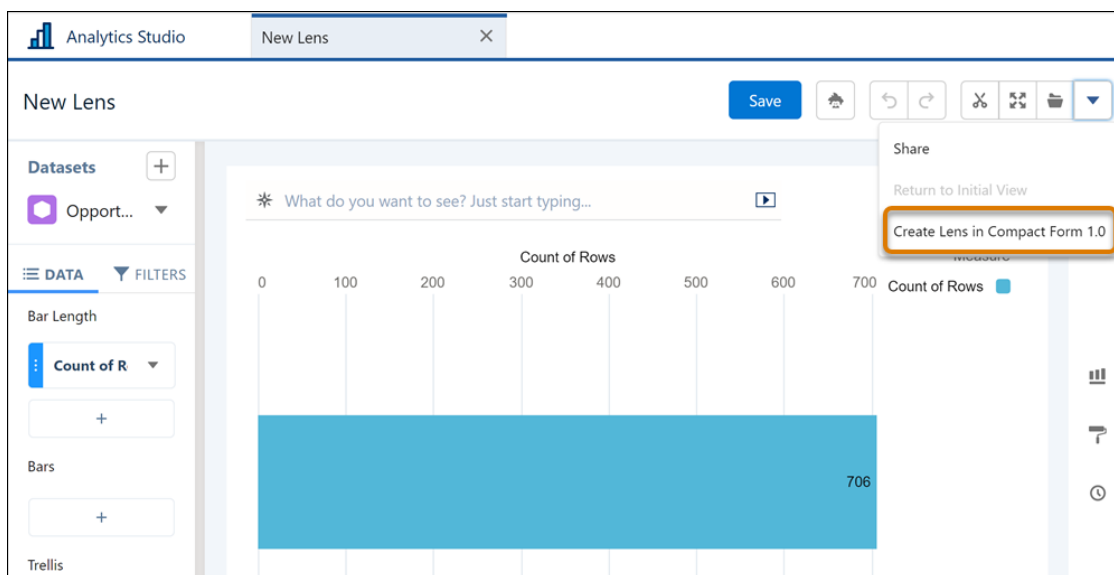
Salesforce Help: Single Click Navigation Interactions (can be outdated or unavailable during release preview)

Write Powerful Queries in Compact Form 2.0 (Generally Available)

Compact form 2.0, the new representation of queries with JSON, is built for efficiently handling multiple datasets and different data sources, such as Customer Data Platform and Snowflake. Work with advanced features, such as data blending, interactions on columns and column maps, and window functions in compare tables, in a more robust and secure framework. 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.

How: By default, all new queries use compact form 2.0. Existing queries remain unchanged. To switch to compact form 1.0, in Analytics Studio, open the dataset you want to explore. In the lens mode, click  and then select **Create Lens in Compact Form 1.0**.




SEE ALSO:

[Salesforce Help: aggregateflex Step Type Properties \(can be outdated or unavailable during release preview\)](#)

Publish Tableau Content to CRM Analytics (Beta)

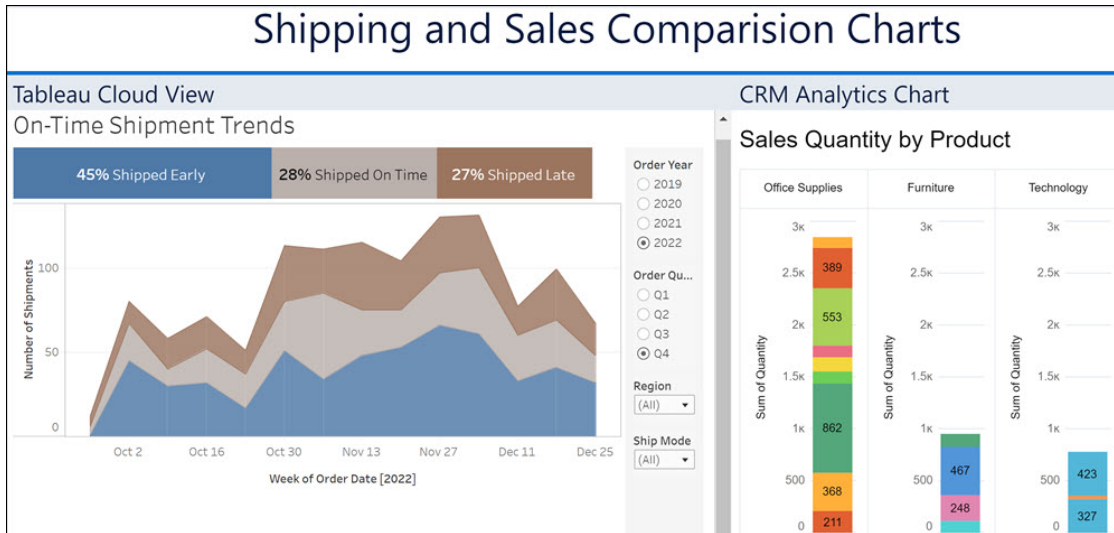
Gain insights on Tableau Cloud and Tableau Server data from the comfort of CRM Analytics Home. Easily publish Tableau Cloud and Tableau Server dashboards, sheets, and stories to a CRM Analytics app or Lightning page without first embedding Tableau views or installing additional software. Combine Tableau Cloud and Tableau Server views with CRM Analytics content in a single dashboard, apply Tableau filters to it, and share it with colleagues to keep them updated on the same data. 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 Views is available to users with a Tableau Creator or Explorer (can publish) license.

Why: Embed a published Tableau Cloud or Tableau Server view in a CRM Analytics dashboard to analyze your data without switching accounts. For example, keep tabs on your shipment trends from Tableau in the same CRM Analytics dashboard that you track sales orders.



How: Ask your Tableau admin to configure the publishing settings in Tableau. Configure your Salesforce org so users can publish Tableau dashboards, sheets, and stories to a CRM Analytics app or Lightning page. In Tableau, select the view that you want to publish to CRM Analytics.

SEE ALSO:

[Tableau Views in CRM Analytics \(can be outdated or unavailable during release preview\)](#)

Better Performance for Embedded Analytics Dashboards

Embedded Analytics dashboards are now rendered with native Lightning web components (LWC) instead of iframes. Using the native LWC framework improves user experience, dashboards load earlier and render faster. Windows opened from the embedded dashboard center on the Lightning Experience viewport and not on the iframe. The embedded dashboard is still the `Aura wave:waveDashboard` component and how you embed dashboards hasn't changed.

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

When: This functionality is available in sandbox starting in the Spring '23 release. For production, it's available on a rolling basis after the Spring '23 release is complete.

How: When the functionality is available, the LWC framework is the default embedding method. If needed, you can embed dashboards with an iframe. From Setup, in the Quick Find box, enter *Analytics*, and select **Settings**. Select **Use legacy iframe instead of LWC for embedded dashboards** and click **Save**.

Edit Queries That Contain Interactions

Queries that have interactions (bindings) are now editable. Rather than rebuilding the query, you can open a query to view it as a lens and validate results or add format changes, such as conditional formatting for emphasis.

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

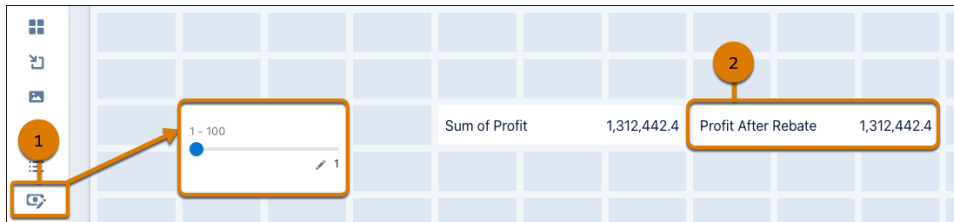
How: Open a dashboard and click **Edit**. Double-click the query with an interaction from the dashboard or the query list. The query now opens without a warning informing you that it contains an interaction. The interaction code is still read-only.

Use the Input Widget in More Ways

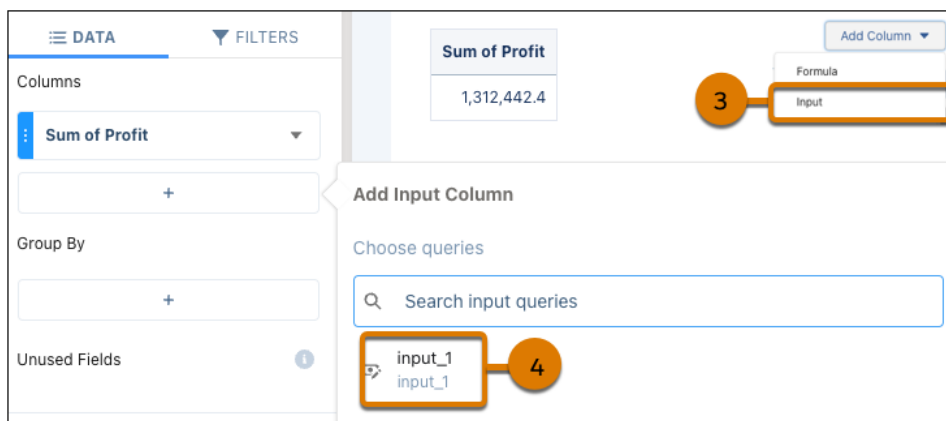
You can now add the input widget to your formulas as a column or in SAQL. The input widget works as a data source by collecting user inputs for use in other parts of the dashboard, such as for a formula query. Previously, an interaction (binding) was the only way to retrieve an input value.

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.

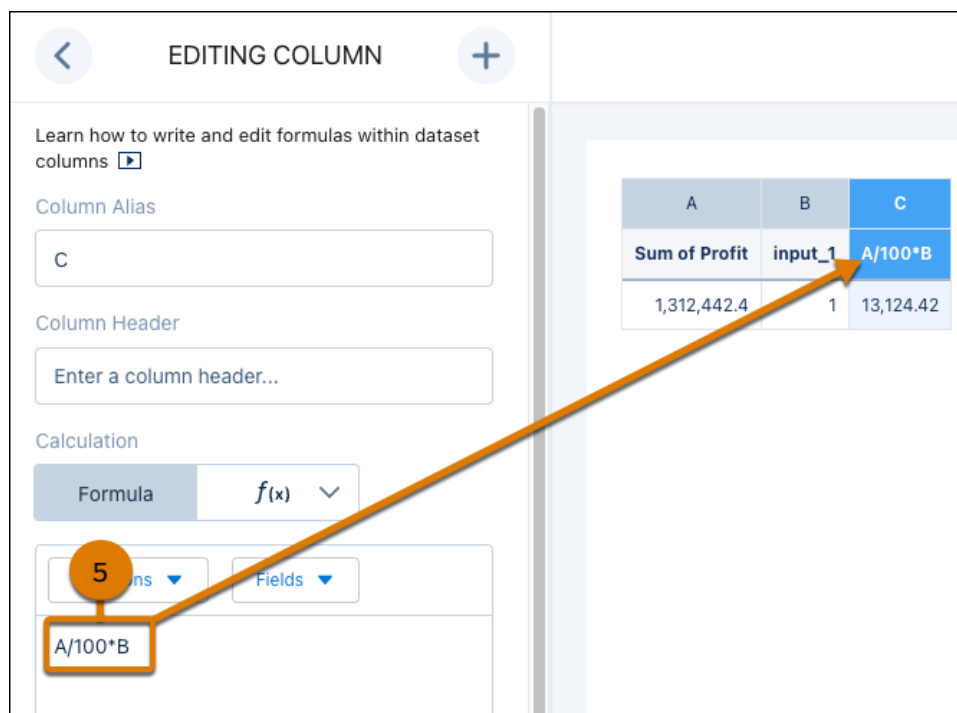
How: Let's say you want to evaluate how different rebate values impact profit. Add the input widget to your dashboard (1), and add a query or open an existing query (2) to calculate profit.



Add an Input column (3) to the query, and select an input query (4).



Add a formula column to the query. In the formula editor (5), create a calculation using the previously added input query.



Migrate Conditional Formatting Assets

Updating dashboards with conditional formatting (assetXMD) and migrating them across orgs is now fully supported. Migration enhancements in CRM Analytics, including automated checks and process modifications, coordinate with packaging validation for a straightforward and successful org migration.

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

SEE ALSO:

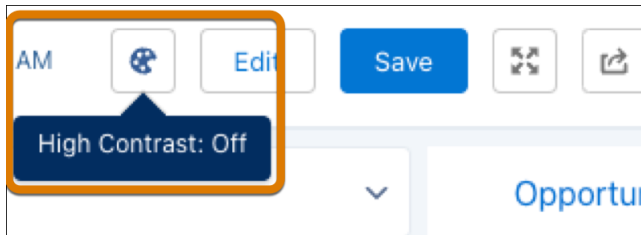
[Migrate CRM Analytics Assets with Change Sets \(can be outdated or unavailable during release preview\)](#)

Improve Dashboard Accessibility with High-Contrast Colors

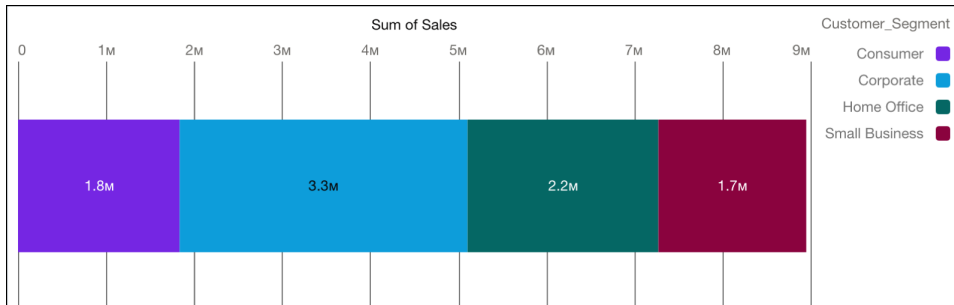
Dashboards now include high-contrast color themes for better readability. High-contrast color combinations help differentiate content from the surrounding dashboard and improve the experience for the end-user. Color schemes in logos, tooltips, and conditional formatting don't automatically adjust, so consider manually incorporating high-contrast colors when possible.

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.

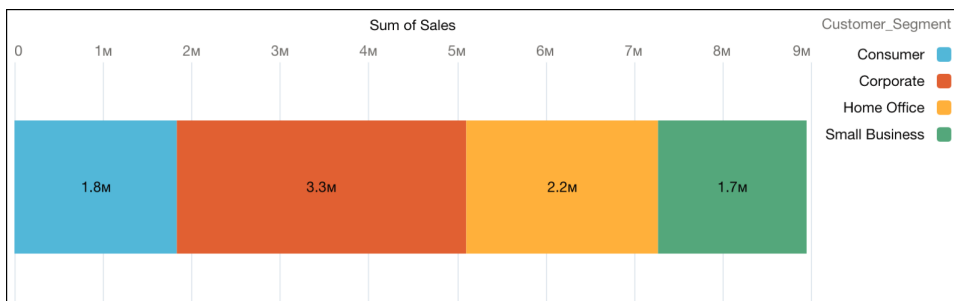
How: In dashboard view mode, use the High Contrast button to turn high-contrasting colors on or off.



Here the High Contrast setting is on.



And here the High Contrast setting is off.

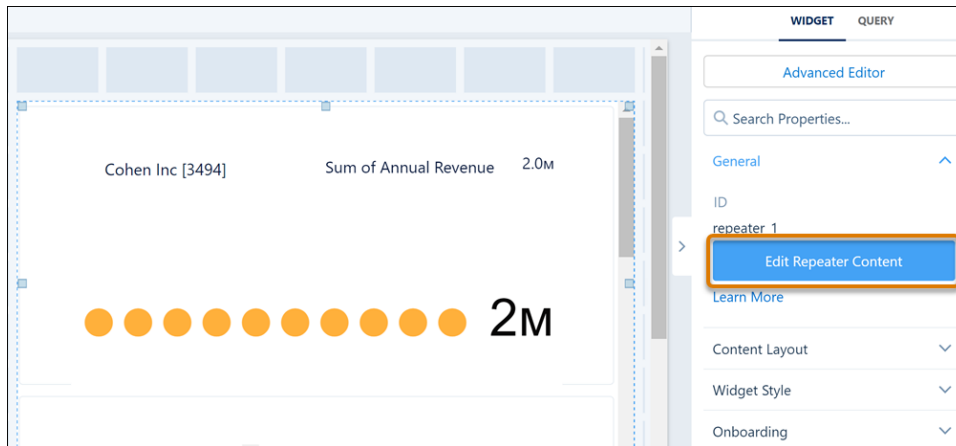


Highlight Important Content in Repeater Widgets with Conditional Formatting

Make key data in repeater widgets stand out by adding rules to format text, numbers, charts, or images. Previously, you could apply conditional formatting only to dynamic text in a repeater. Now you can define a separate rule for each widget in the repeater intuitively based on a value or range. The options available vary depending on the widget type. For example, on a text widget, you can apply a formatting rule to a field or the entire widget, while you can display symbols with conditional rules on an image widget.

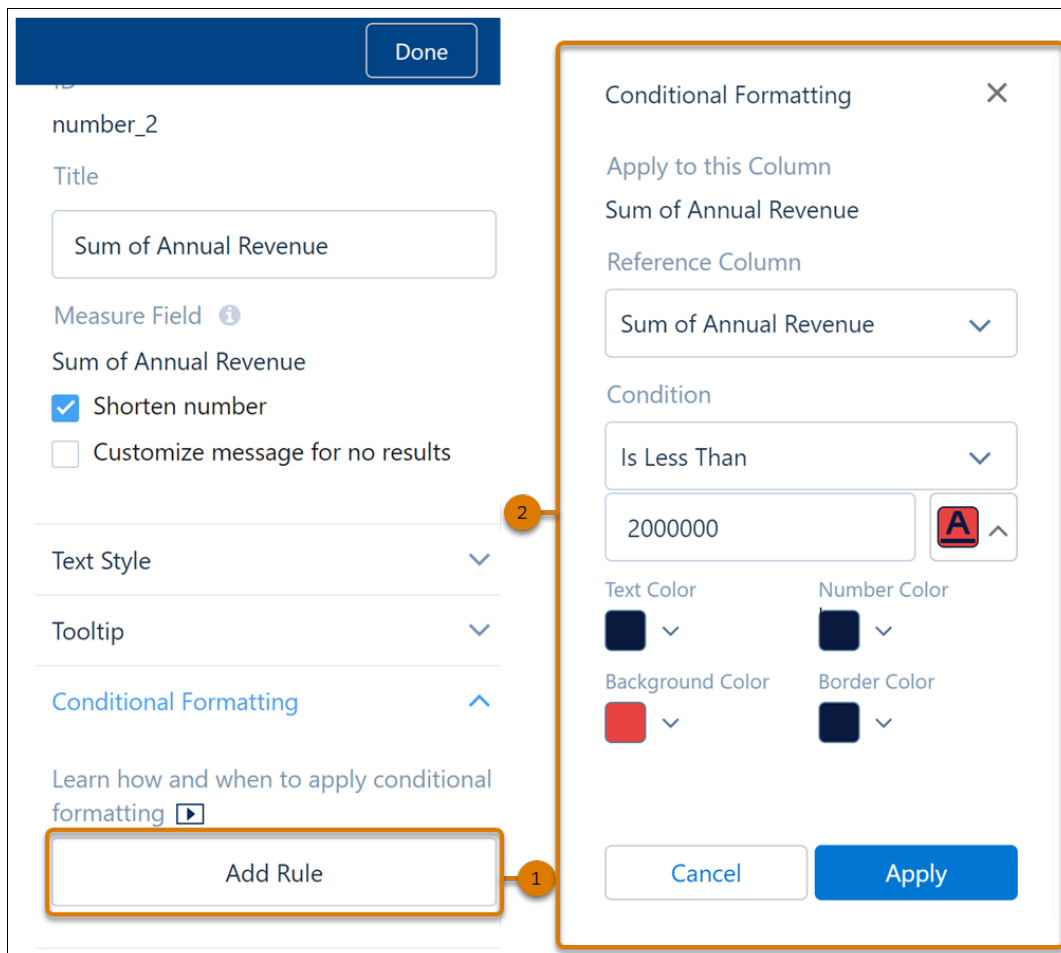
Where: This change applies to CRM Analytics in Lightning Experience and Salesforce Classic. CRM Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

How: In the dashboard designer, with the repeater widget selected, click **Edit Repeater Content** in the Widget tab.



In the repeater, select the widget to which you want to add the conditional formatting rule, and then click **Add Rule** (1). For text widgets, add the query data before creating the rule.

Define the rule settings and apply your changes (2).

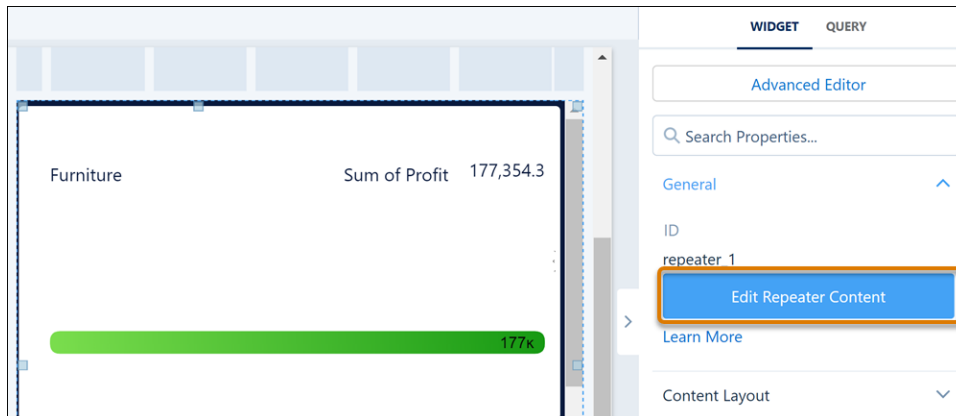


Create Tooltips for Repeater Widgets

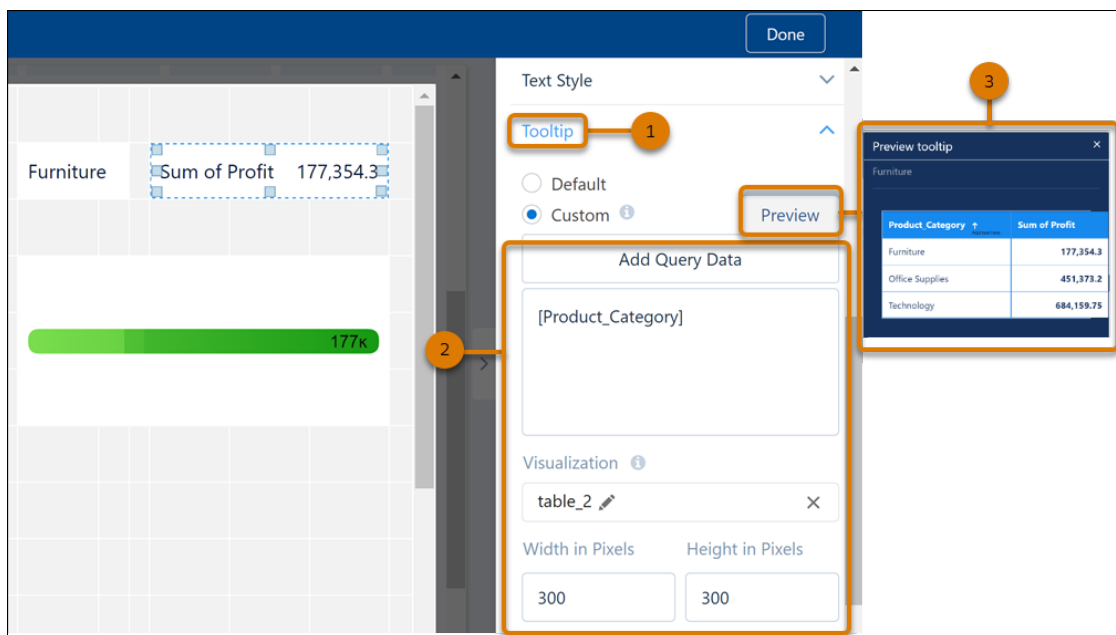
For a quick review of related data while reviewing metrics in a scrollable layout, add tooltips to a repeater. Now you can design a separate tooltip for text, numbers, images, and bullet, gauge, polar gauge or flat gauge charts in the repeater. The options available vary depending on the widget type. For example, on a number widget, you can choose a default or custom tooltip, while you can include custom text, data point details, and visualizations in a chart widget's tooltip.

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 the dashboard designer, with the repeater widget selected, click **Edit Repeater Content** in the Widget tab.



In the repeater, select the widget to which you want to add the tooltip, and then click **Tooltip** (1). Set tooltip content and its size (2). Preview the tooltip (3).



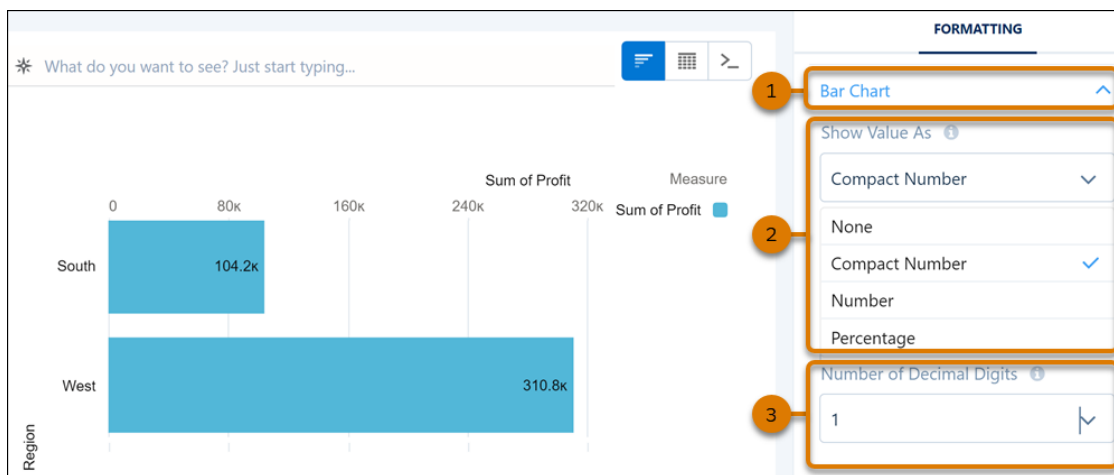
Click **Done** and save your changes to the dashboard.

Format Numbers in Charts to Your Liking

Take advantage of new formatting options for chart numbers in lenses and dashboards. Display the entire number value when precision is important, or the compact version for improved readability, or a percentage relative to the total value represented in the chart for easier comparisons.

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 chart's formatting panel or a dashboard's widget properties panel, click the chart's properties section (1). Choose an option from the menu (2). When you select the compact version, you can also specify the number of decimal places to include (3).




When using this feature, number formats applied to a column are also respected.

Sort Pivot Tables by a Measure (Generally Available)

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. This feature, which is now generally available, includes an update since the last release. Previously, you could sort pivot tables by a measure only after manually switching to compact form 2.0.

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

How: 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, click  in the Sum of Sales column (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).

Region	Product_Category	Product_Sub_Category	Central	East	South
Furniture		Bookcases	117,000.00	83,301.50	
		Chairs & Chairmats	327,000.00	161,498.55	
		Office Furnishings	135,000.00	87,378.65	
		Tables	278,000.00	214,082.40	
Office Supplies		Appliances	169,000.00	74,777.71	
		Binders and Binder Accessories	188,990.69	251,266.94	107,957.32
		Envelopes	29,006.31	53,071.97	15,017.21
		Labels	7,109.35	6,233.37	5,481.32
		Paper	69,784.83	70,540.35	51,753.30

View Subtotals in Pivot Tables (Generally Available)

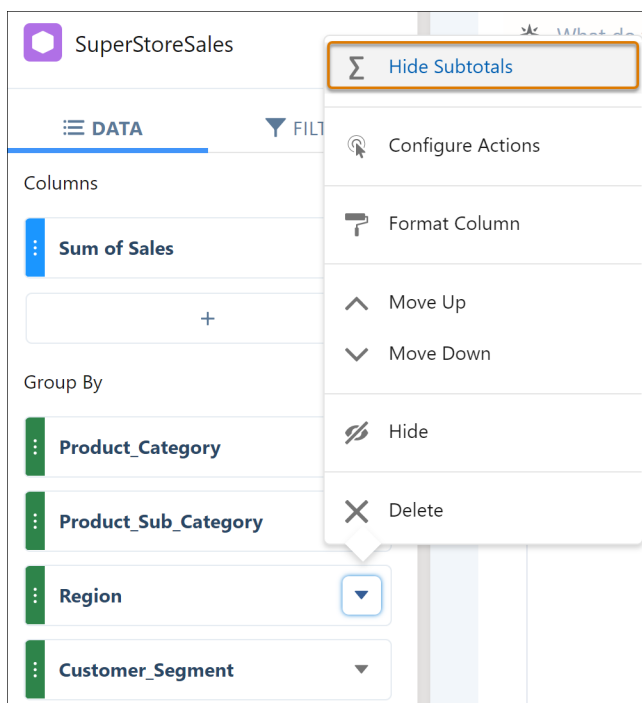
Add subtotals to a pivot table with at least two groupings in addition to the pivoted dimension. Use subtotals in a lens or dashboard to compare similar segments of data to each other or to the overall total. You can even hide the subtotal for a subgroup that you're not interested in. This feature, which is now generally available, includes an update since the last release. Previously, you could view pivot table subtotals only after manually switching to compact form 2.0.

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

How: 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, click Σ (1), and then select **Show Subtotals** (2).

Region	Product_Category	Product_Sub_Category	Central	East	South	West
		Pens & Art Supplies	25,346.38	32,873.21	15,176.71	
		Rubber Bands	2,847.27	2,429.89	1,189.21	2,197.40
		Scissors, Rulers and Trimmers	18,071.74	2,562.67	4,383.28	15,411.18
		Storage & Organization	161,766.71	157,874.37	98,214.47	167,849.36
		Subtotal	672,768.64	711,438.58	373,950.53	500,167.80
Technology		Computer Peripherals	131,915.62	133,951.95	133,718.62	91,254.34
		Copiers and Fax	214,366.22	164,600.07	78,565.08	203,680.56
		Office Machines	315,993.24	227,077.90	279,525.09	396,060.36
		Telephones and Communication	346,080.28	321,672.92	185,325.80	291,193.98
		Subtotal	1,008,355.36	847,302.84	677,134.59	982,189.24

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



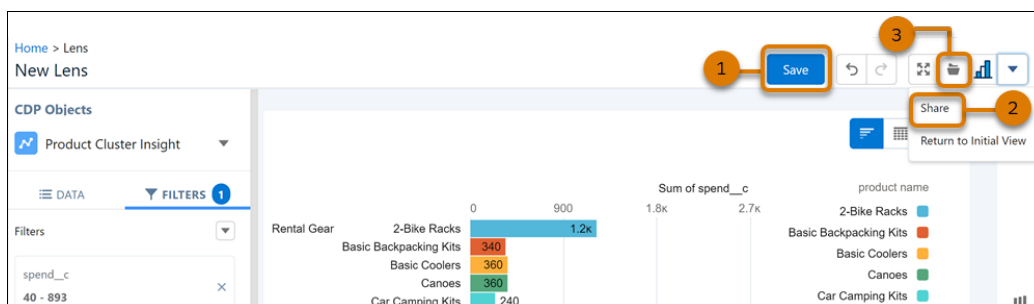
Save and Share Single-Click Customer Data Platform Explorations

Now you can save single-click explorations on calculated insights, data lake objects, and data models as a lens. Or, download query results as an image, Excel, or CSV file for future reference. To stay on top of your most important Customer Data Platform insights, add the lens to a collection. To let others review or deep-dive into your analysis, post your lens to Chatter, share its unique URL, or the collection that it belongs to.

Where: This change applies to CRM Analytics in Lightning Experience. 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: The options to save (1), share (2), and add single-click explorations to a collection (3) are available at the top of the lens page.



Power Queries on Calculated Insights with Fine-Tuned Metadata

When you work with Calculated Insights in Customer Data Platform, CRM Analytics processes both the field and data type metadata. In the fields panel, you now see accurate options to aggregate, group, and filter data and perform calculations. With this improvement, you also avoid incorrect data operations as you build queries. For example, customer ranking in Calculated Insights is correctly identified as a non-aggregatable measure.

Where: This change applies to CRM Analytics in Lightning Experience. 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.

SEE ALSO:


[Launch Explorations for Customer Data Platform with a Single Click \(can be outdated or unavailable during release preview\)](#)

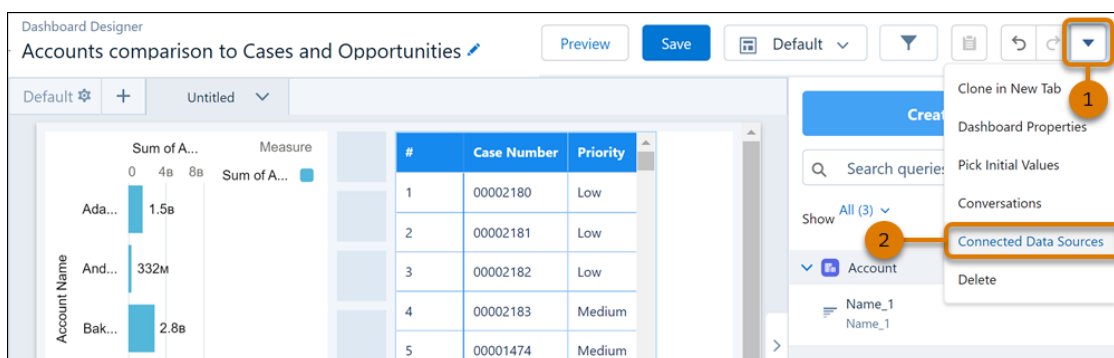
[Calculated Insights \(can be outdated or unavailable during release preview\)](#)

Facet SOQL Queries on Related Salesforce Objects with Ease

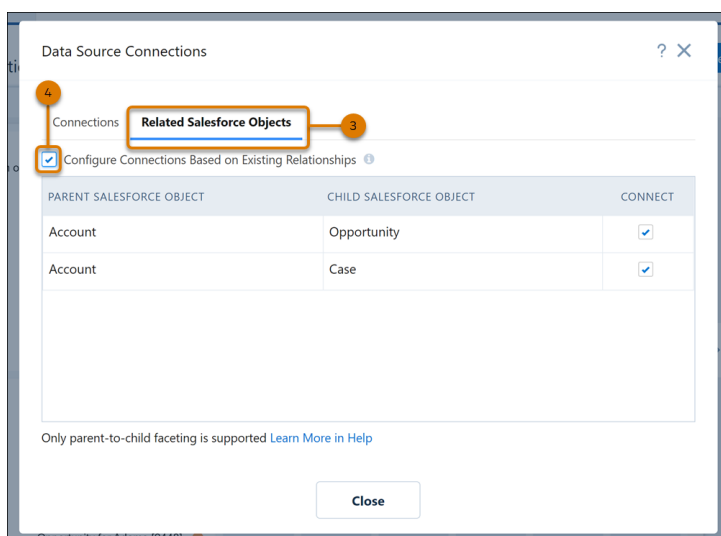
Surfacing trends between Salesforce objects with parent-child relationships is now easier. For example, on a dashboard that's set up to monitor Salesforce account records, you can track related opportunities and cases without code. Parent-child faceting between steps built on Salesforce objects is enabled by default on new dashboards.

Where: These changes apply to CRM Analytics in Lightning Experience and Salesforce Classic. CRM Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

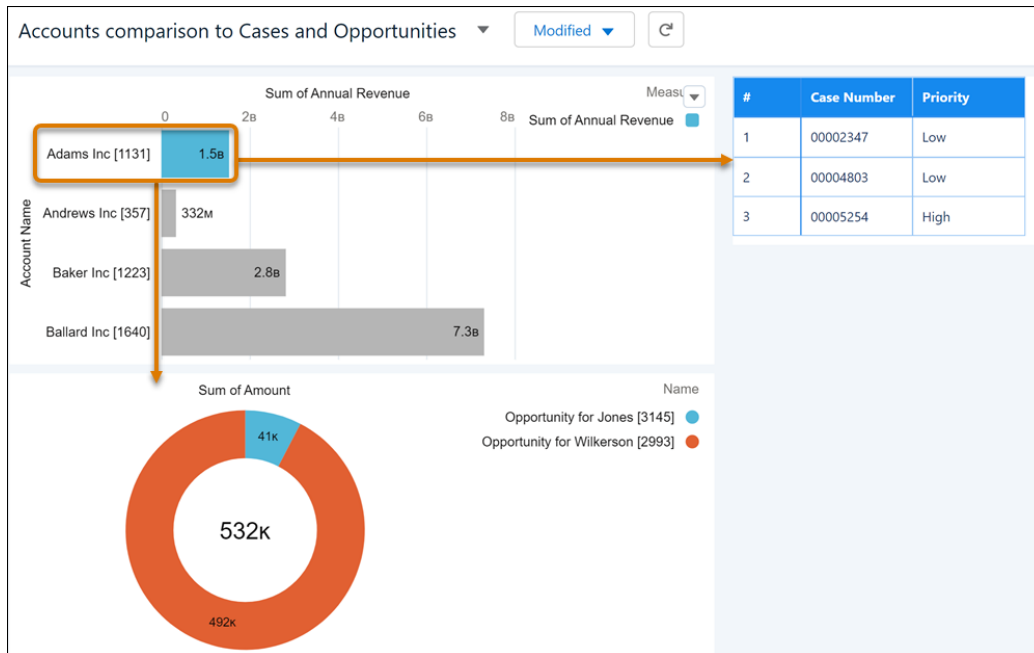
How: To facet opportunities and cases based on accounts, after adding queries for the three data sources in the dashboard, click  in the dashboard designer (1) and then select **Connected Data Sources** (2).



In Data Source Connections, on the **Related Salesforce Objects** tab (3), select **Configure Connections Based on Existing Relationships** (4).



Close the window and save your changes to the dashboard. In preview mode, click an account to review related opportunities and cases.



If you configured cross-data faceting on Salesforce objects with parent-child relationships, we recommend replacing them with parent-child faceting. To enable child-parent faceting on steps querying Salesforce objects, continue to use interactions or modify JSON.

SEE ALSO:

[Configure Faceting on Related Salesforce Objects \(can be outdated or unavailable during release preview\)](#)

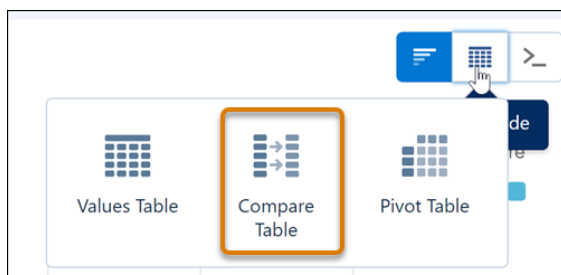
Apply Powerful Formulas and Functions to Direct Data

Save time when you run complex calculations on data in Customer Data Platform, Snowflake, and Google BigQuery. Use the column editor to create text string formulas, work with math functions, or perform calculations across rows of data with windowing functions. Previously, you wrote custom SQL queries in CRM Analytics Direct Data.

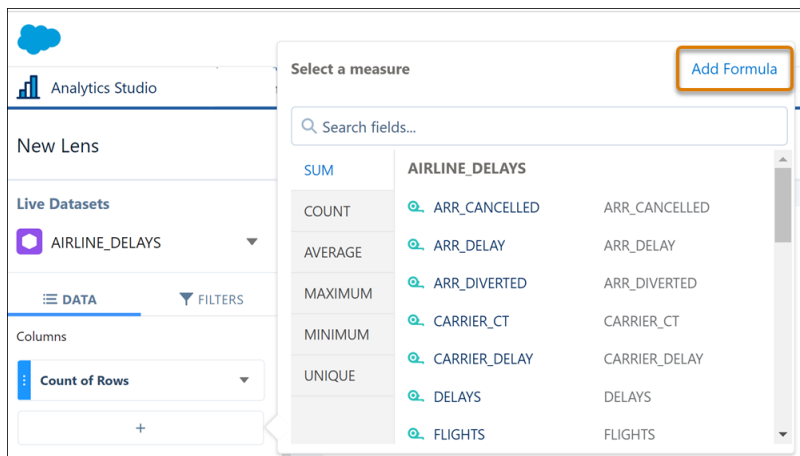
Where: These changes apply to CRM Analytics in Lightning Experience and Salesforce Classic. CRM Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

How: Open the live dataset or Customer Data Platform record in a lens.

In Table mode, select **Compare Table**.



Under Measures, click **+**, and then click **Add Formula**.



Other Enhancements to CRM Analytics App Building

Learn about these enhancements to CRM Analytics lenses and dashboards.

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

Add Tooltips to Images in Repeater Widgets

To show additional details when you hover over an image in a repeater widget, you can add custom text, a chart, table, or component to the image's tooltip.

Enjoy More Formatting Options in Dashboard Widgets

- On a text widget, you can apply a conditional formatting rule to a field or the entire widget. In addition to text and background color, you can also specify the widget's border color.
- You can set a color for numbers and borders in a number widget.

Einstein Discovery

Stories are now models. Get Einstein Discovery predictions and recommendations in Revenue Intelligence. Join the Decision Optimization pilot to improve recommendations. See the estimated run time of your models. Use custom text to make Einstein easier to understand.

IN THIS SECTION:

[Hello Predictive Models, Farewell Stories](#)

Einstein Discovery uses predictive modeling to make predictions and suggestions about future outcomes. It's not fiction, it's machine-learning, and for clarity we renamed "stories" to "models." Now you no longer go through a story to get to a model. Model creation and exploration have a more intuitive design that's easier to navigate. And, while you're no longer able to create insights without a model, rest assured that every model still includes the insights that you're used to.

[Get Einstein Discovery in Revenue Intelligence](#)

Revenue Intelligence now includes Einstein Discovery models. Get predictions and recommendations from Einstein Discovery models directly on your dashboards. Use Account Discovery to predict potential growth of accounts and find which accounts need attention. Use the Revenue Insights dashboard to maximize deal size, increase win rate, and reduce time to close.

[Improve Recommendations with Decision Optimization \(Pilot\)](#)

With decision optimization, ensure that Einstein's recommendations are relevant, feasible, and aligned to the big picture. Use decision optimization to control Einstein's suggested improvements by incorporating your business rules, objectives, and constraints. For example, send field service reps to improve customer satisfaction while limiting the number of appointments. Or, focus your sales reps on maximizing revenue and not just their win rate by optimizing a likelihood-to-win model to include opportunity amount and suggest actions in accordance with time limits and budget constraints.

[See Estimated Model Run Time \(Generally Available\)](#)

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

[Make Einstein Easier to Understand](#)

You can now customize the top predictor text of Einstein predictions so that they're easier to understand. For example, you can have Einstein explain that a top predictor for time in the sales cycle is "Repeat Purchase" instead of "Previous Closed Won Opportunity Match is True." Previously, you could only customize Einstein's suggested improvements. Custom text for top predictors and suggested improvements shown in the Einstein Prediction component on your lightning pages is configured during deployment or in model manager.

[Get Fine-Grain Model Performance on Specific Values \(Generally Available\)](#)

Measure the quality of your model for each value group within a variable. Performance is shown as a decimal score, where 1 is perfect accuracy. For example, in the variable *store*, Miami has a performance score of 0.99, and Honolulu a score of 0.79. You can then conclude that the model is performing better for the Miami store than the Honolulu store. Use the graphs to see a detailed comparison of the values by performance and row count.

[Queue Models for Einstein to Run](#)

Save time by giving Einstein a to-do list. You can now add models to a queue for Einstein to run. You can queue up to seven models at one time. Einstein actively runs two models and can handle up to five more in the queue. Previously, you could run only two models at a time without any queue.

[Predict with Live Google BigQuery Data](#)

Run predictions from your deployed models with live, external data from Google BigQuery. You can map your predictions to use live data outside Salesforce, such as market intelligence or advertising history, without having to move and maintain the data across systems.

[Einstein Predictions Component Has a New Look](#)

The Einstein Predictions Component now blends seamlessly on your Lightning record pages. The new design has a larger predicted value and less clutter. The top predictors and suggested improvements are easier to read.

[Turn Big Data into Predictions Faster \(Generally Available\)](#)

Build predictive models faster with smart sampling. Smart sampling downsizes big datasets to representative samples. When smart sampling is applied, Einstein evaluates the data and then selectively reduces the number of rows used to train the model. Your model completes faster. The data insight charts are still based on the entire dataset. Smart sampling is automatically applied when a dataset has more than 5 million rows and the model algorithm is XGBoost or Model Tournament.

SEE ALSO:

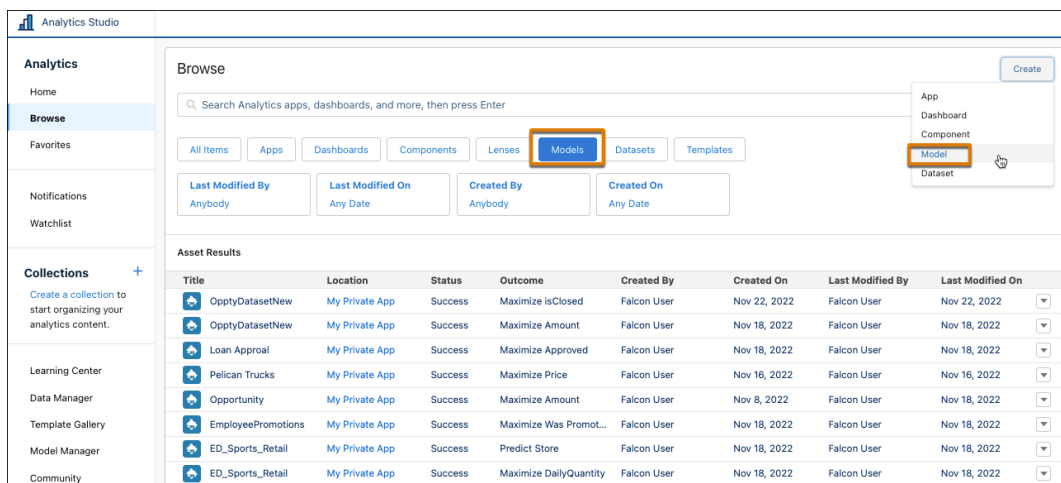
[Einstein Release Notes](#)

Hello Predictive Models, Farewell Stories

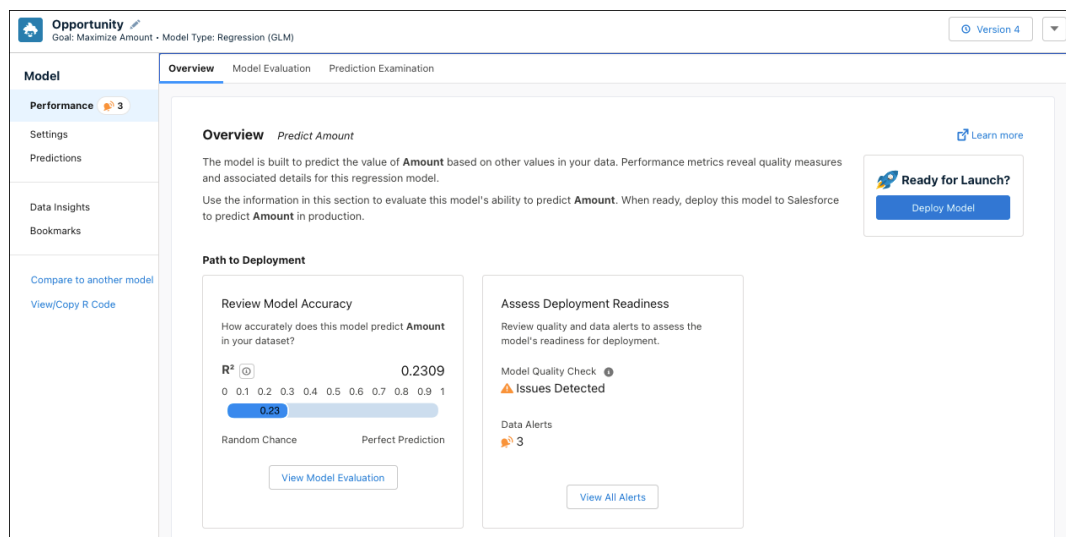
Einstein Discovery uses predictive modeling to make predictions and suggestions about future outcomes. It's not fiction, it's machine-learning, and for clarity we renamed "stories" to "models." Now you no longer go through a story to get to a model. Model creation and exploration have a more intuitive design that's easier to navigate. And, while you're no longer able to create insights without a model, rest assured that every model still includes the insights that you're used to.

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

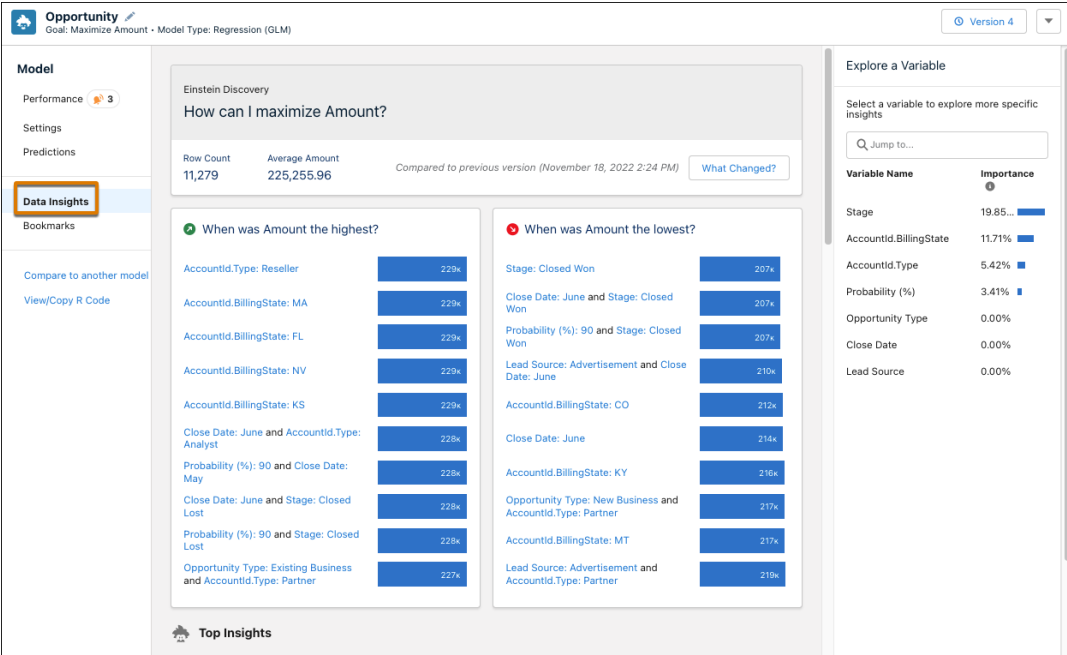
How: In Analytics Studio, existing stories are renamed as models. For example, to create a model, select **Model** from the Create menu.



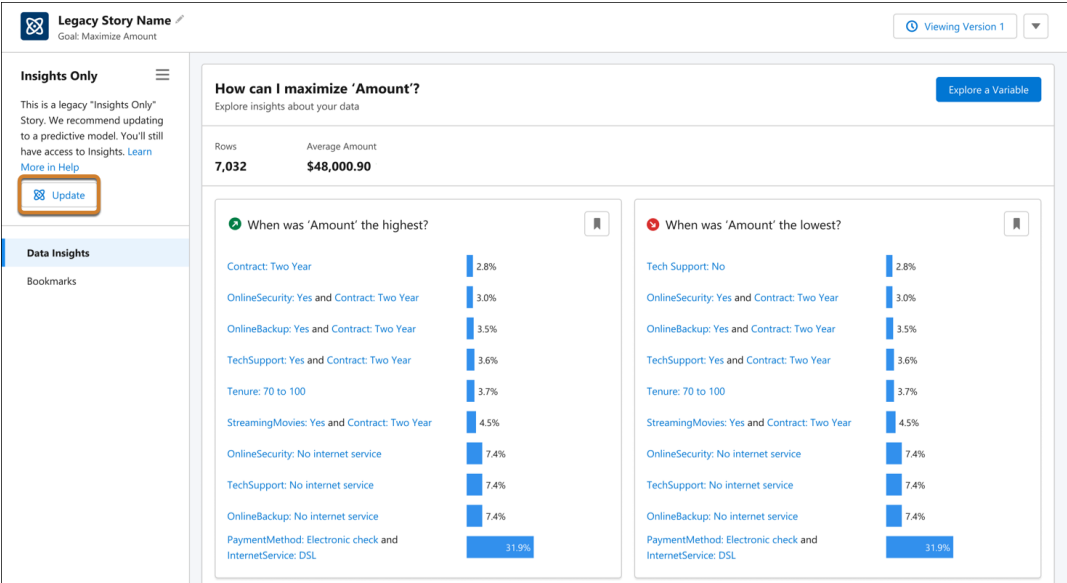
When you access your model, the overview of model performance now appears first.



To see the insights, click **Data Insights**.



Existing insights only stories are still available. Click **Update** to convert to a model.



SEE ALSO:

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

Get Einstein Discovery in Revenue Intelligence

Revenue Intelligence now includes Einstein Discovery models. Get predictions and recommendations from Einstein Discovery models directly on your dashboards. Use Account Discovery to predict potential growth of accounts and find which accounts need attention. Use the Revenue Insights dashboard to maximize deal size, increase win rate, and reduce time to close.

To learn more about Account Discovery, see [Get Account Health Details with Account Discovery](#) on page 531.

To learn more about Einstein Discovery in the Revenue Insights dashboard, see [Maximize Your Deal Size and Win Rate, and Reduce Time to Close](#) on page 533.

Improve Recommendations with Decision Optimization (Pilot)

With decision optimization, ensure that Einstein's recommendations are relevant, feasible, and aligned to the big picture. Use decision optimization to control Einstein's suggested improvements by incorporating your business rules, objectives, and constraints. For example, send field service reps to improve customer satisfaction while limiting the number of appointments. Or, focus your sales reps on maximizing revenue and not just their win rate by optimizing a likelihood-to-win model to include opportunity amount and suggest actions in accordance with time limits and budget constraints.

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

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

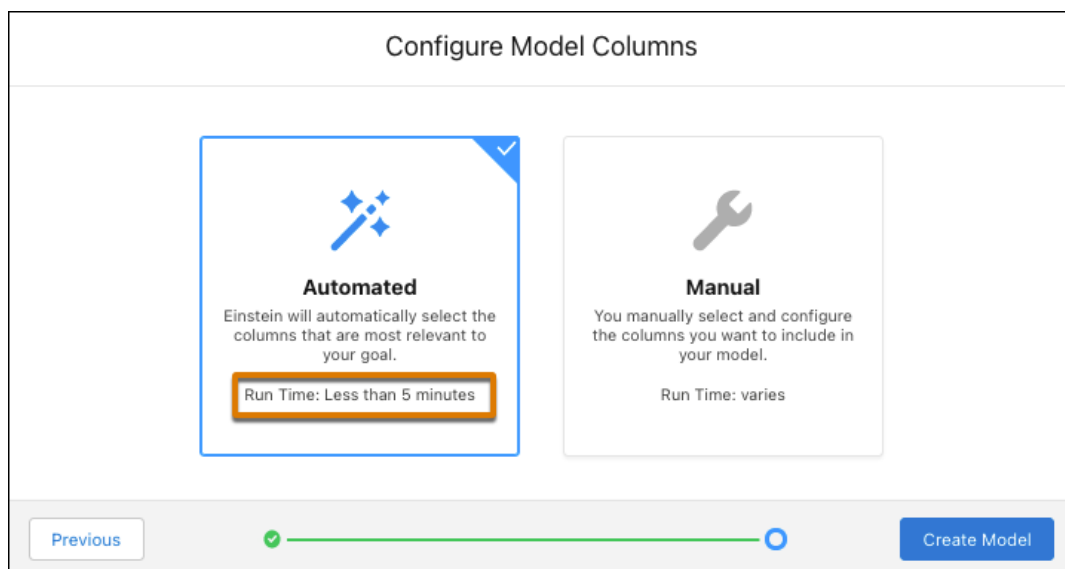
How: To participate in the pilot program, contact your Salesforce account executive.

See Estimated Model Run Time (Generally Available)

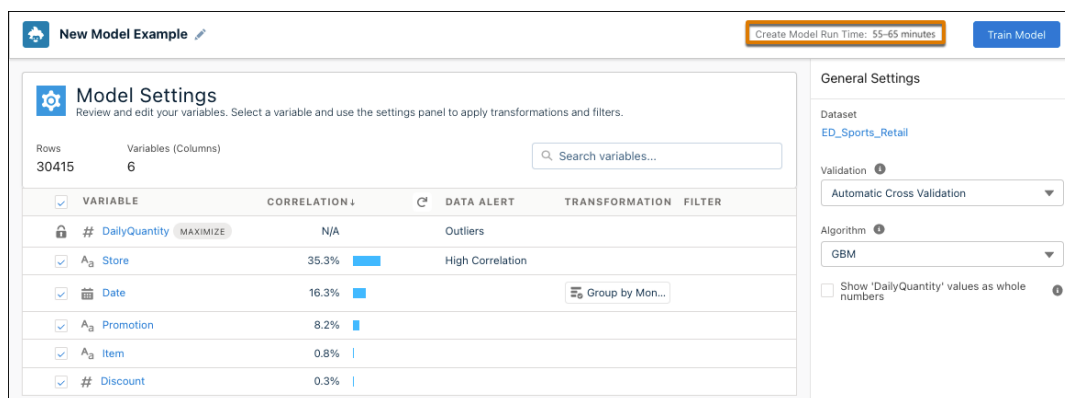
No more wondering how long it'll take your model to complete. Einstein now shows approximately how much time it takes to create a model or update an existing one. While your model is running, Einstein updates the estimated time to completion so that you can work on other things while Einstein does the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

How: Create a model with automated configuration. The run-time estimate appears for the automated option in the Configure Model Columns window.



For manual model configuration and updates to an existing model, see the run-time estimate next to the Train Model button.



SEE ALSO:

[Salesforce Help: Create a Model](#) (can be outdated or unavailable during release preview)

[Salesforce Help: Edit Model Settings](#) (can be outdated or unavailable during release preview)

Make Einstein Easier to Understand

You can now customize the top predictor text of Einstein predictions so that they're easier to understand. For example, you can have Einstein explain that a top predictor for time in the sales cycle is "Repeat Purchase" instead of "Previous Closed Won Opportunity Match is True." Previously, you could only customize Einstein's suggested improvements. Custom text for top predictors and suggested improvements shown in the Einstein Prediction component on your lightning pages is configured during deployment or in model manager.

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

How: Use the customize predictions step during model deployment.

Customize Predictions

Customize predictions so that they're easier for end users to understand. Other customizations to the Einstein Predictions component are available in the Lightning App Builder. [Learn more](#)

☒ Customize
☐ Don't customize

Suggested Improvements

Select Actionable Variables to Customize ⓘ
Select actionable variables...

Top Predictors

Select Variables to Customize ⓘ
Search variables...

Previous 1 2 3 4 5 Next

For deployed models, use model manager to edit the model settings for Prediction Customization.

Predicted Time to Close 1 Model

Overview Scoring Model Refresh

Model Settings Performance History

Model Details
Goal: Minimize Time to Close
Type: Regression
Model Quality Check: No Major Issues Detected

Object Connection
Opportunity Object
24 of 24 variables mapped

Actionable Variables
Start Us Events
Discontinue

Prediction Customization
No customization

Segmentation Filters
No segmentation

Cancel Save

Provide custom text for variables when they appear as top predictors or suggested improvements. In the Customize Predictions window, select **Customize** (1). Select the variables that you want to customize (2). For each selected variable, select the value and enter the custom text (3).

Customize Predictions

Customize predictions so that they're easier for end users to understand. Other customizations to the Einstein Predictions component are available in the Lightning App Builder. [Learn more](#)

☒ Customize 1
☐ Don't customize

Suggested Improvements

Select Variables to Customize 2

2 variables selected

A₃ Demo # Discount

Demo

Suggested Value 3 Customization Text

True Customize text Schedule Demo

False Don't show Change Demo to [value]

[+ Add Value](#)

Discount

Suggested Value Customization Text

Increase Customize text Offer Membership Discount

Decrease Don't show Change Discount to [value]

[+ Add Value](#)

[Cancel](#) [Save](#)

SEE ALSO:

[Salesforce Help: Get Predictions on Lightning Pages \(can be outdated or unavailable during release preview\)](#)

Get Fine-Grain Model Performance on Specific Values (Generally Available)

Measure the quality of your model for each value group within a variable. Performance is shown as a decimal score, where 1 is perfect accuracy. For example, in the variable *store*, Miami has a performance score of 0.99, and Honolulu a score of 0.79. You can then conclude that the model is performing better for the Miami store than the Honolulu store. Use the graphs to see a detailed comparison of the values by performance and row count.

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 Model Settings, select a variable in the table to see the performance by value.

Model Settings
Review and edit your variables. Select a variable and use the settings panel to apply transformations and filters.

Rows: 30415 Variables (Columns): 6

Search variables...

VARIABLE	IMPORTANCE	DATA ALERT	TRANSFORMATION	FILTER
# DailyQuantity <small>MAXIMIZE</small>	N/A	Outliers		
<input checked="" type="checkbox"/> A ₃ Store	43.5%	High Correlation		
<input checked="" type="checkbox"/> Date	21.6%		Group by Month of Year	
<input checked="" type="checkbox"/> A ₃ Promotion	14.7%			
<input checked="" type="checkbox"/> # Discount	11.6%			
<input checked="" type="checkbox"/> A ₃ Item	8.6%			

Store

Alert Performance Settings

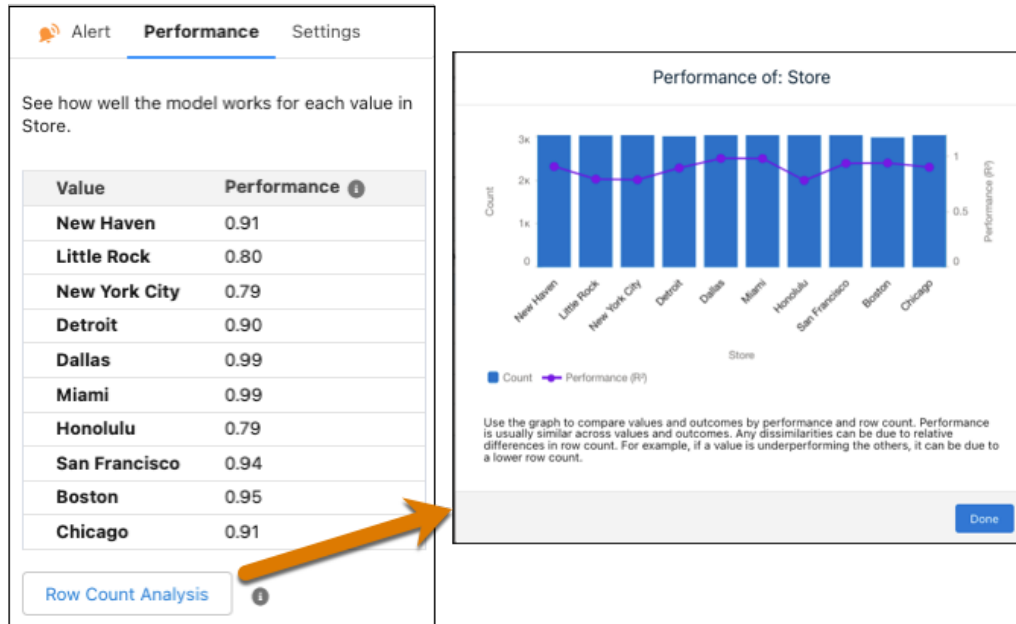
See how well the model works for each value in Store.

Value	Performance
New Haven	0.91
Little Rock	0.80
New York City	0.79
Detroit	0.90
Dallas	0.99
Miami	0.99
Honolulu	0.79
San Francisco	0.94
Boston	0.95
Chicago	0.91

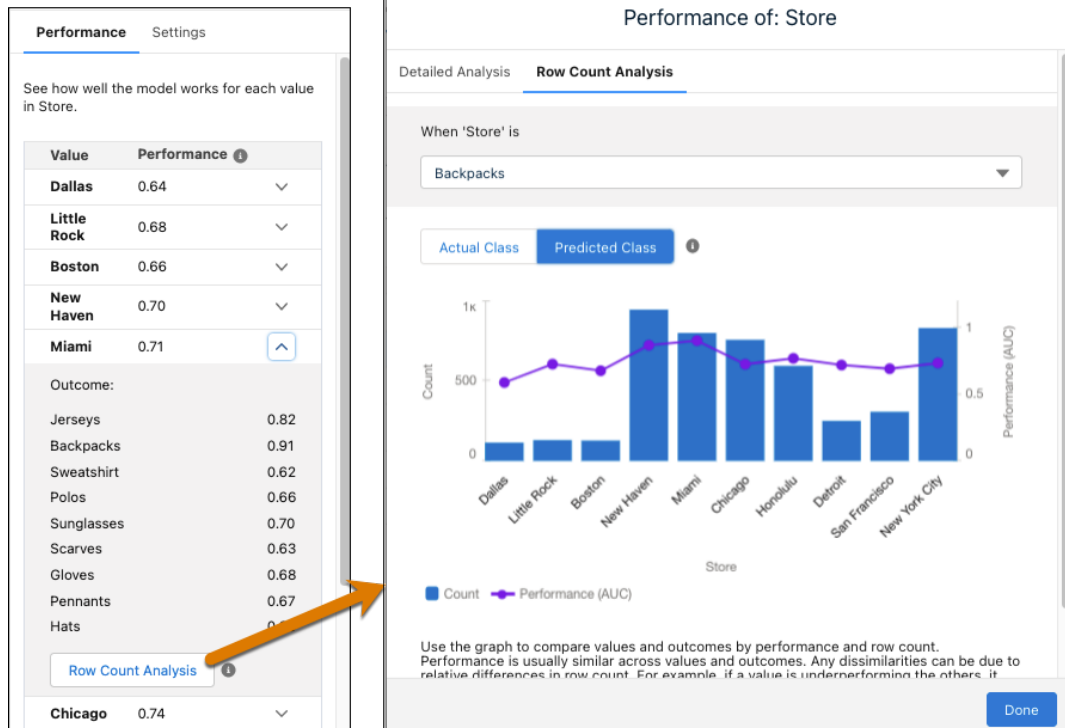
[Row Count Analysis](#)

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 can perform differently if it occurs much more or less than others.

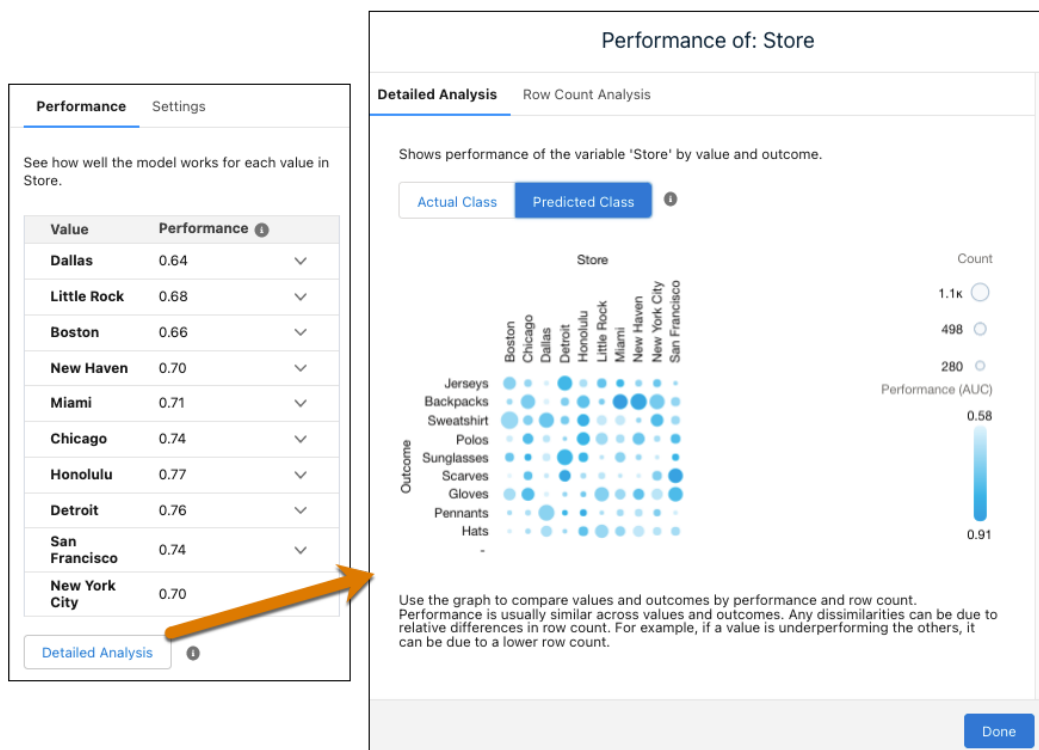
In regression and binary analysis models, click **Row Count Analysis** to see the graphic comparison of values by performance and row count.



In multiclass analysis models, click ☐ to expand a value to see performance by outcome. Click **Row Count Analysis** to see the graphic comparison of values and outcomes by performance and row count.



In multiclass analysis models, click **Detailed Analysis** to see a graph of performance by value and outcome. The darker the circle, the better the performance. The bigger the circle, the higher the row count.



SEE ALSO:

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

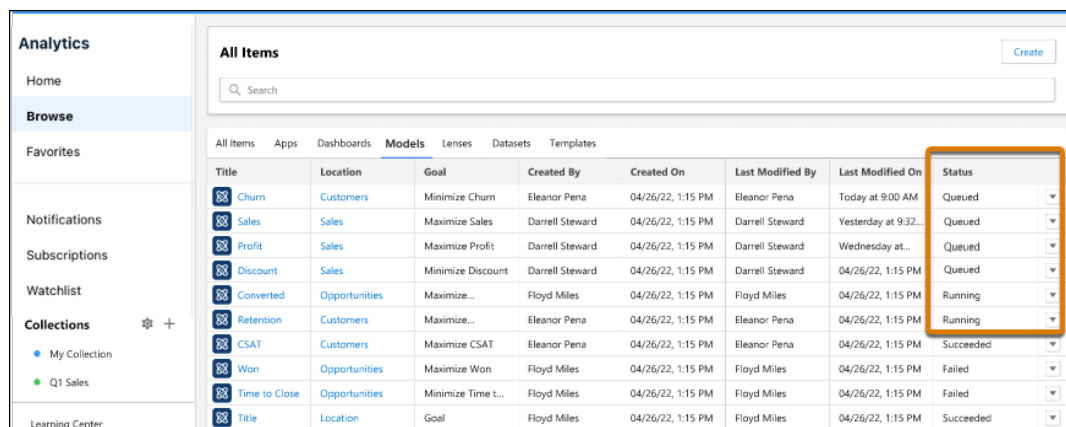
[Salesforce Help: Configure Number Variables \(can be outdated or unavailable during release preview\)](#)

Queue Models for Einstein to Run

Save time by giving Einstein a to-do list. You can now add models to a queue for Einstein to run. You can queue up to seven models at one time. Einstein actively runs two models and can handle up to five more in the queue. Previously, you could run only two models at a time without any queue.

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 you create, train or retrain models, Einstein Discovery automatically queues them to run. Use the Status column to see what's running and what's in the queue.



All Items								
Q Search								
All Items Apps Dashboards Models Lenses Datasets Templates								
Title	Location	Goal	Created By	Created On	Last Modified By	Last Modified On	Status	
Churn	Customers	Minimize Churn	Eleanor Pena	04/26/22, 1:15 PM	Eleanor Pena	Today at 9:00 AM	Queued	
Sales	Sales	Maximize Sales	Darrell Steward	04/26/22, 1:15 PM	Darrell Steward	Yesterday at 9:32...	Queued	
Profit	Sales	Maximize Profit	Darrell Steward	04/26/22, 1:15 PM	Darrell Steward	Wednesday at...	Queued	
Discount	Sales	Minimize Discount	Darrell Steward	04/26/22, 1:15 PM	Darrell Steward	04/26/22, 1:15 PM	Queued	
Converted	Opportunities	Maximize...	Floyd Miles	04/26/22, 1:15 PM	Floyd Miles	04/26/22, 1:15 PM	Running	
Retention	Customers	Maximize...	Eleanor Pena	04/26/22, 1:15 PM	Eleanor Pena	04/26/22, 1:15 PM	Running	
CSAT	Customers	Maximize CSAT	Eleanor Pena	04/26/22, 1:15 PM	Eleanor Pena	04/26/22, 1:15 PM	Succeeded	
Won	Opportunities	Maximize Won	Floyd Miles	04/26/22, 1:15 PM	Floyd Miles	04/26/22, 1:15 PM	Failed	
Time to Close	Opportunities	Minimize Time L...	Floyd Miles	04/26/22, 1:15 PM	Floyd Miles	04/26/22, 1:15 PM	Failed	
Title	Location	Goal	Floyd Miles	04/26/22, 1:15 PM	Floyd Miles	04/26/22, 1:15 PM	Succeeded	

SEE ALSO:

[Salesforce Help: Einstein Discovery Capacities and Limits \(can be outdated or unavailable during release preview\)](#)

Predict with Live Google BigQuery Data

Run predictions from your deployed models with live, external data from Google BigQuery. You can map your predictions to use live data outside Salesforce, such as market intelligence or advertising history, without having to move and maintain the data across systems.

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 deployment, select the **Google BigQuery** dataset as the supplemental dataset and map your model variables.

Map Model Variables

Map all variables in the model to fields in Salesforce objects or to columns in the supplemental dataset. Einstein automatically suggests mappings based on similar names. [Learn more](#)

▼ Link to Supplemental Dataset

⚠ Adding a dataset will use only Salesforce sharing rules. Any sharing rules on the dataset will be ignored

Connected Salesforce Object

Account

Connected Salesforce Object ID Field

Market Segment

Supplemental Dataset

Google BigQuery Data

Supplemental Dataset Record ID Column

Market Segment (BigQuery)

10 of 10 Mapped

Model Variable		Object Field		Supplemental Dataset Column
Annual Income	✓	Annual Income	×	<input type="text"/>
AUM	✓	AUM	×	<input type="text"/>
NPS	✓	NPS	×	<input type="text"/>
Customer Type	✓	<input type="text"/>	Q	Customer Type (BigQuery) ×
Money Outflow	✓	Money Outflow	×	<input type="text"/>
Engagement	✓	<input type="text"/>	Q	Ad Engagement (BigQuery) ×

Previous

✓ ✓ ○ ● ● ●

Next

SEE ALSO:

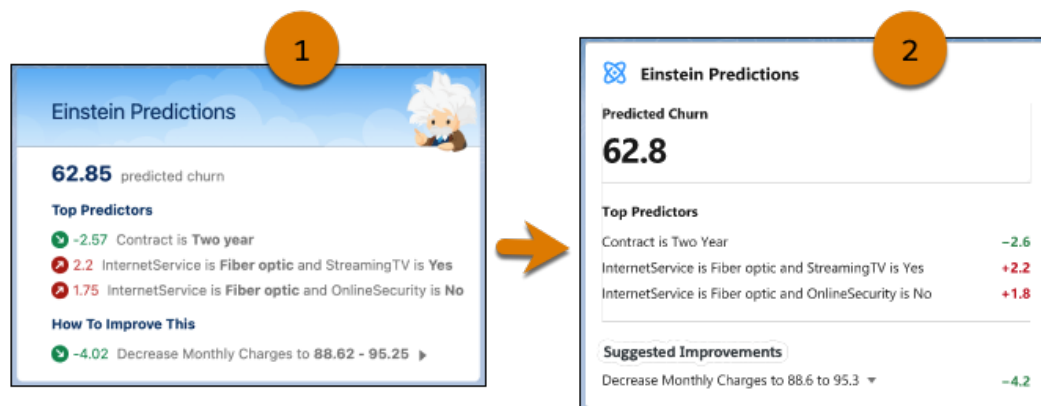
[Salesforce Help: Map Model Variables](#) (can be outdated or unavailable during release preview)

Einstein Predictions Component Has a New Look

The Einstein Predictions Component now blends seamlessly on your Lightning record pages. The new design has a larger predicted value and less clutter. The top predictors and suggested improvements are easier to read.

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: The previous version (1) of the Einstein Predictions component is automatically updated to the new version (2).



SEE ALSO:

[Salesforce Help: Get Predictions on Lightning Pages \(can be outdated or unavailable during release preview\)](#)

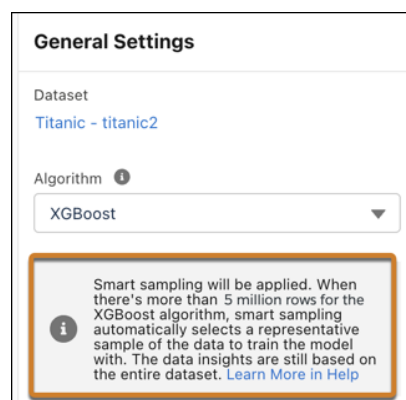
Turn Big Data into Predictions Faster (Generally Available)

Build predictive models faster with smart sampling. Smart sampling downsizes big datasets to representative samples. When smart sampling is applied, Einstein evaluates the data and then selectively reduces the number of rows used to train the model. Your model completes faster. The data insight charts are still based on the entire dataset. Smart sampling is automatically applied when a dataset has more than 5 million rows and the model algorithm is XGBoost or Model Tournament.

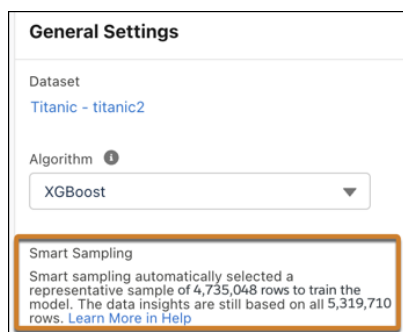
Where: This change applies to CRM Analytics in Lightning Experience and Salesforce Classic. CRM Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

How: To see if smart sampling is applied, go to your model's General Settings.

Before the model is created, a notification indicates that smart sampling will be applied.



After the model is created, you can see the reduced row count due to smart sampling



SEE ALSO:

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

CRM Analytics for Everyone

Add Lightning reports and dashboards to collections, pin and hide collections on the Analytics Home page, and preview assets within collections. Provide more options for recipients when you send analytics links with Slack link unfurling. Include a snapshot of the dashboard widget with your CRM Analytics notifications in Slack.

IN THIS SECTION:

[Include Lightning Reports and Dashboards in Collections \(Beta\)](#)

You can now add Lightning reports and dashboards to new or existing collections and personalize Unified Home. Curate the perfect collection to stay more organized with analytics assets from multiple apps and Lightning folders.

[Pin and Hide Collections](#)

Users can now pin and hide their collections, giving them more options to customize their home page. Previously, users couldn't control which collections were displayed on their home page. Now they can pin collections to the top of the list for easy access. Hidden collections are still accessible through the collections management UI, a collection URL, or as an embedded Lightning component.

[Browse Collections with Asset Previews](#)

Collections now provide additional context to make it easier for users to decide which items are relevant or require attention. The new asset previews also give you a glimpse of what an asset is about.

[Do More with Analytics Links in Slack](#)

Send links to analytics items, and give recipients more options with Slack link unfurling. When you post a link in Slack to a Lightning report or dashboard or a CRM Analytics dashboard or lens, the link unfurls to provide options for further interaction with the item. If the recipients have the CRM Analytics for Slack app, they see options such as View Details and Open in Salesforce. If they don't have the app, recipients are invited to install it.


[Get More Context in Slack Notifications](#)

CRM Analytics notifications in Slack can now include a snapshot of the widget where the notification is set. The snapshot is taken when the notification is sent, giving you immediate visibility into your data. Previously, the notification included a visualization of the triggering condition.

Include Lightning Reports and Dashboards in Collections (Beta)

You can now add Lightning reports and dashboards to new or existing collections and personalize Unified Home. Curate the perfect collection to stay more organized with analytics assets from multiple apps and Lightning folders.

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: Unified Home for Analytics must be enabled to support reports and dashboards in collections.

How: From Setup, in the Quick Find box, enter *Analytics*, and then select **Settings**. Select **Enable the Unified Experience for Analytics Home**.

SEE ALSO:

[Stay Organized by Adding Reports and Dashboards to Collections \(Beta\)](#)

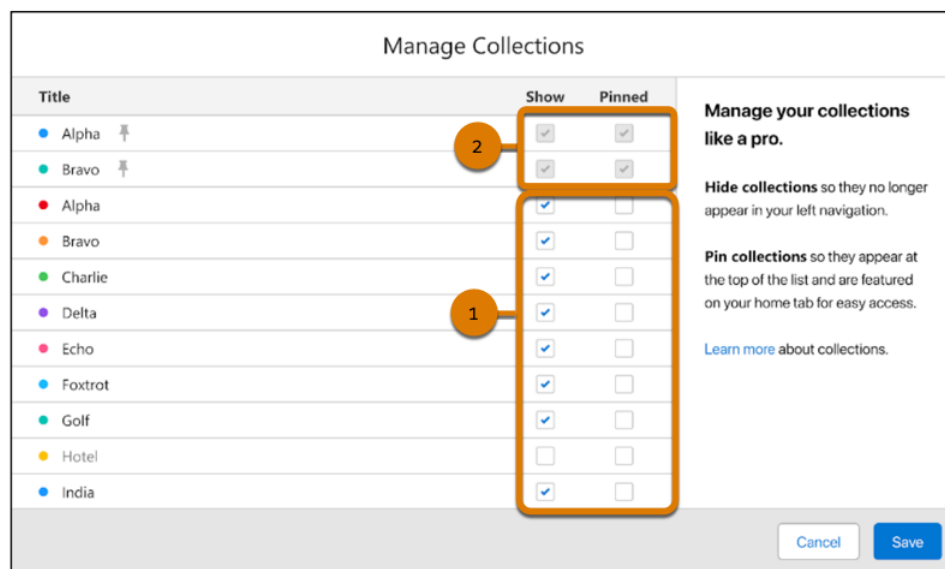
Pin and Hide Collections

Users can now pin and hide their collections, giving them more options to customize their home page. Previously, users couldn't control which collections were displayed on their home page. Now they can pin collections to the top of the list for easy access. Hidden collections are still accessible through the collections management UI, a collection URL, or as an embedded Lightning component.

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

How: From the App Launcher, select **Analytics**. Click the gear icon in the Collections panel.

Users can choose which collections to show and pin on their individual home page (1), but they can't hide or unpin required collections (2). Pinning collections from the homepage only pins the collection for yourself. Pinning collections to another user's homepage must be done using Share within the collection you want to pin, and requires the Manage Analytics user permission.



Title	Show	Pinned
Alpha	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Bravo	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Alpha	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Bravo	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Charlie	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Delta	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Echo	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Foxtrot	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Golf	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Hotel	<input type="checkbox"/>	<input type="checkbox"/>
India	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Manage your collections like a pro.

Hide collections so they no longer appear in your left navigation.

Pin collections so they appear at the top of the list and are featured on your home tab for easy access.

[Learn more](#) about collections.

Cancel Save

SEE ALSO:

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

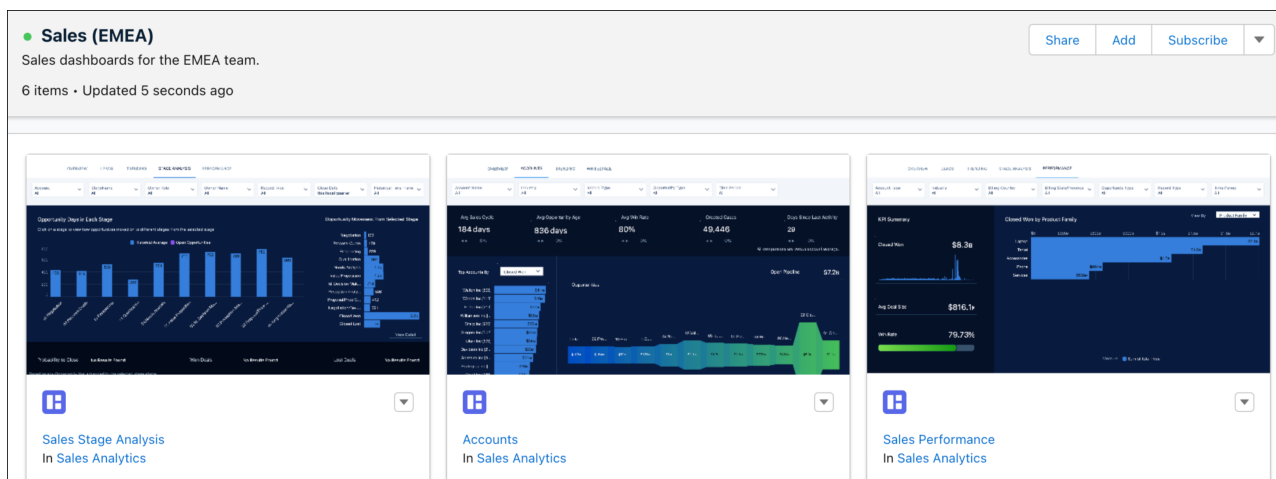
Browse Collections with Asset Previews

Collections now provide additional context to make it easier for users to decide which items are relevant or require attention. The new asset previews also give you a glimpse of what an asset is about.

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: Asset previews are automatic unless the asset has security predicates. In Analytics settings, select **Show preview thumbnails for secure lenses and dashboards**.

From the App Launcher, select **Analytics** and click a collection on your home page. The collection opens with a snapshot of its contents.



SEE ALSO:

[Salesforce Help: Enable Previews for All Assets \(can be outdated or unavailable during release preview\)](#)

Do More with Analytics Links in Slack

Send links to analytics items, and give recipients more options with Slack link unfurling. When you post a link in Slack to a Lightning report or dashboard or a CRM Analytics dashboard or lens, the link unfurls to provide options for further interaction with the item. If the recipients have the CRM Analytics for Slack app, they see options such as View Details and Open in Salesforce. If they don't have the app, recipients are invited to install it.

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 in Salesforce and the Salesforce for Slack app in their Slack workspace connected to their Salesforce account.

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

The screenshot shows the Salesforce Setup interface. The left sidebar contains navigation links: Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Manage Subscription, ADMINISTRATION (Users, Data, Email), PLATFORM TOOLS (Apps, Feature Settings, Slack), and Slack (Build Slack Apps with Apex, Initial Slack Setup, Slack Apps Setup (CRM Analytics for Slack, Sales Cloud For Slack)).

The main content area is titled "5 Verify Data Sharing Options" with a "Go to Users" button. It explains that users need permissions to view and edit records in Slack. A dropdown menu "Set Record Detail Security for Your Salesforce Apps" is set to "Show Object Type Only". A note states: "This is the stronger choice for data privacy. The record name is omitted from the preview for all users. Users with access to the record in Salesforce can see its details in Slack. [Learn more in Help.](#)"

An "Example Slack notification:" shows two examples:

- Sales Cloud for Slack** (12:42 PM): "Opportunity Amount Updated. The amount was changed to [Restricted]. Opportunity | [Restricted]". Includes a "View Opportunity" button.
- Service Cloud for Slack** (12:42 PM): "Swarm request from @Sarah White. Case | Record details are restricted". Includes "View Case" and "Finish Swarming" buttons. A "Help Needed: Sev 1" message is also shown.

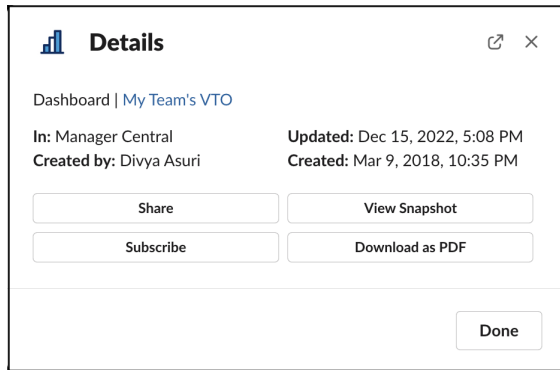
The section "Link Unfurling by Salesforce for Slack App" explains how to configure what data gets shown when links are shared. A dropdown "Unfurling Options for Salesforce for Slack App" is set to "Name, Type and Preview Button" (marked with a circled 1). A note states: "This will display the record's object type, name, and a preview button to open a modal containing the record details. The modal will be opened with the viewer's permissions."

An "Example Link Preview:" shows a preview of a shared link: "Account | Burlington Textiles Corp of America" (marked with a circled 2). Below the preview are buttons for "View in Slack" and "Open in Salesforce". The text "Added by Salesforce for Slack" is at the bottom.

To enable link unfurling for CRM Analytics for Slack, select a sharing option from the menu (1). The Example Link Preview (2) shows how the post will look. In CRM Analytics for Slack, the options for analytics items are always View Details and Open in Salesforce.

The example Slack notification shows the CRM Analytics app icon and name, followed by the text "You shared a Salesforce Analytics item." Below this are two buttons: "View Details" and "Open in Salesforce".

Note: Depending on the item, from Details, you can share it, view a snapshot, subscribe, or download it as a PDF file.



After setup, link unfurling works by default in public channels. For private channels, you can invite the app to the channel by at-mentioning it.

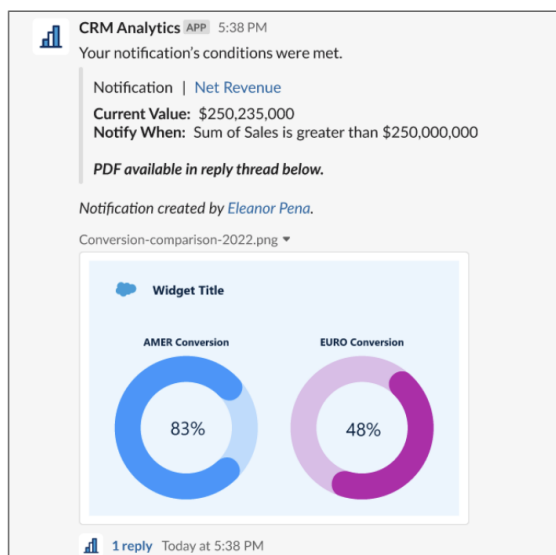
Get More Context in Slack Notifications

CRM Analytics notifications in Slack can now include a snapshot of the widget where the notification is set. The snapshot is taken when the notification is sent, giving you immediate visibility into your data. Previously, the notification included a visualization of the triggering condition.

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 share CRM Analytics notifications, users must have the Add Recipients to CRM Analytics Notifications permission.

How: If you haven't already imported notifications into Slack, go to the Slack Home tab and click **Import Notifications**. The new snapshots are enabled by default.



When sharing notifications with others, you have the option to include the snapshot. Keep in mind that sharing an image means that others can see and share your personal view of your data.

SEE ALSO:

[Salesforce Help: Import and Add Recipients to CRM Analytics Notifications](#)

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 the new Lightning Web Runtime (LWR) template for B2B stores to create a high-performance store that uses the same technology as the B2C store template and is easier to customize. Improve SEO for your stores. Use new promotion features to create progressive tier promotions and apply promotions to product variants. Display related products on one product detail page using product sets. Search more efficiently, and import data asynchronously. Configure B2B and B2C stores to use multiple currencies and ship-to countries. Offer customers an improved checkout experience with a modular checkout for B2B LWR stores, a default shipping address, and support for buyers switching accounts during checkout.

[Omnichannel Inventory](#)

Self-provision the connection between B2C Commerce and Omnichannel Inventory. Import more inventory records in less time, and gain more visibility in shared group reservation counts.

[Salesforce Order Management](#)

Place orders on behalf of customers with a new UI flow, and identify whether an order summary was created on behalf of a customer. Track and manage packing for online orders. Charge fees in simple returns and cancellations. Import order data from external channels at high scale using Connect API. Provision and deactivate B2C Commerce connections.

[Salesforce Payments](#)

Offer shoppers a smooth and secure checkout experience with Salesforce Payments, available for Salesforce B2C Commerce and as an application on the Salesforce platform. For B2B stores that use the LWR template, use Salesforce Payments to add credit card support at checkout.

[Marketplace for Salesforce Commerce](#)

Use the Commerce Marketplace app and invite third-party sellers to sell their products directly to shoppers on your Salesforce Commerce storefront. After integrating your Commerce storefront to the Commerce Marketplace app, you can match third-party sellers' categories and products with the ones offered in your Commerce storefront, as well as approving new seller suggested products. You can also export third-party seller prices into Commerce, and split orders so that each seller receives and fulfills their own. Create a custom shipping cost calculation so that shoppers can select a single delivery method for orders from multiple sellers. The Commerce Marketplace app also offers a Multi-Marketplace solution that allows you to create and manage different Marketplaces.

B2B and B2B2C Commerce

Use the new Lightning Web Runtime (LWR) template for B2B stores to create a high-performance store that uses the same technology as the B2C store template and is easier to customize. Improve SEO for your stores. Use new promotion features to create progressive tier promotions and apply promotions to product variants. Display related products on one product detail page using product sets. Search more efficiently, and import data asynchronously. Configure B2B and B2C stores to use multiple currencies and ship-to countries. Offer customers an improved checkout experience with a modular checkout for B2B LWR stores, a default shipping address, and support for buyers switching accounts during checkout.

IN THIS SECTION:

[Create a B2B Store Built on Lightning Web Runtime](#)

The new B2B Lightning Web Runtime (LWR) store template uses the same technology and shares components with the B2C store template. The B2B LWR template provides better performance than the B2B Aura template and is easier to customize because large components are broken into smaller building blocks. We recommend that you select the B2B LWR template for new stores and consider migrating existing B2B stores that are built on the Aura template to LWR.

[Improve SEO with URL Slugs and Redirects \(Pilot\)](#)

To boost organic traffic on your store, improve search engine optimization (SEO) with new URL configuration solutions. Create SEO-friendly URL snippets, or “slugs,” for each Product and Category page. A URL slug improves SEO by replacing a record ID with relevant and human-readable information in a URL, ensuring that your store’s pages are optimally surfaced in search engines. You can also use dynamic rules, including regular expression pattern matching, to redirect customers from old URLs to new ones.

[Use Dynamic Redirect Rules in LWR Commerce Stores \(Pilot\)](#)

Configure dynamic URL redirect rules that use a pattern to identify a URL from your site and automatically redirect it to a Salesforce B2C Commerce URL. Dynamic rules are helpful especially in cases where you’ve created user-friendly URL slugs for your product pages.

[Promotions](#)

Create tiered promotions and apply the highest qualifying tier to a cart. Create more-advanced buy-one-get-one (BOGO) deals. Automatically apply category promotions to variants.

[Show Related Products on One Product Detail Page](#)

B2C stores and B2B stores created with the LWR template can now show collections of related products on a single product detail page (PDP) using product sets. A product set groups a parent product with multiple related child products. The child products are shown together on the PDP, but each child is priced separately. A shopper can add all the products to the cart in a single operation or selectively add individual child products. B2C stores provide a built-in Product Set component you can use to show product sets on the PDP.

[Search](#)

Deliver AI-powered search results. Spend less time rebuilding the search index with partial reindexing.

[Commerce Data Import is Now Asynchronous](#)

Commerce product and related data (product variations, and images) import is now asynchronous. With asynchronous import, you can start an import and perform other tasks while the import completes in the background. Asynchronous imports are also more efficient and offer faster performance. Asynchronous import uses the standard CSV import file format. You can import up to 10,000 products with nine images each in one session.

[Global Sales](#)

Configure B2B and B2C stores with multiple ship-to countries and multiple currencies. Add a country setting to B2B stores. Create a contact point shipping address for multiple countries. Apply state and province taxes, and assign how they’re applied.

Checkout

Create and customize checkout for a B2B LWR store. Reduce time to purchase by automatically selecting a customer's default shipping address. Orders are now processed asynchronously for improved performance. Let buyers switch accounts during checkout. Recalculate pricing and inventory at the start of checkout.

Upgrade Cart Components in Your B2C Store

The B2C template includes new cart components built for improved performance and added customization. If you have an existing B2C store, we recommend that you replace your legacy components with the latest options. Legacy cart components continue to work, but no longer receive enhancements.

Customize Components with Cart Data

Specify which details to show in a customer's cart. On the Cart page of B2B or B2C stores built with the LWR template, some components include a list of expressions that you can add to pull in cart data. For example, you want the Cart Summary component to show the total number of products next to the header. Click the header Text Block, and in the Text or Expression field, enter `Summary {!Cart.Details.totalProductCount}`.

Use the Nested Expressions Data Source in the Grid Component

When using the Grid component in an LWR store template in Experience Builder, you now have a third option for a data source to bind data: Nested Expressions. With the Nested Expressions data source, you can bind data nested in the top-level data source.

Configure Menu Items with the User Profile Menu Component

The User Profile Menu component replaces the MyAccount component in B2B and B2C LWR sites. The component provides a unified user experience across desktop and mobile. You can configure guest user and authenticated user options, including authenticated icons. The component supports the account switcher functionality in B2B LWR sites using the newly added menu item type window. You can use the new window menu type to initiate the out-of-the-box account selector or a custom selector.

Order Settings Are Now Configured Automatically

Previously, the Commerce setup process required you to configure order settings manually in Salesforce Setup. Now order settings for B2B and B2B2C Commerce licenses are automated. After setup, you can verify the settings.

Use More Field Options for Customer Addresses

The B2B and B2C stores Contact Point Address (CPA) form now includes separate fields for First Name, Last Name, Company Name, and Phone Number. The new fields are included in the shipping and billing address forms. The form also supports First Name and Last Name field placement that auto-configures to the selected country's address etiquette.

Programmatically Change a Web Store's Site Association

After you copy experience site data between a sandbox and production, or between sandboxes, you can now programmatically associate a web store in the target org with the copied site by updating the corresponding WebStoreNetwork record. You can even change the association while the store is active. The site must use a template that's compatible with the web store type, and the site can't be associated with a store. The site previously associated with the store can be associated with a new store. Previously, you couldn't change a web store's site association.

Confirm That Your Products Are Ready to Sell

Use Product Readiness to see which of your products are ready to be sold. Ready products satisfy all recommended criteria by including components such as images and descriptions. These criteria can make products more accessible and appealing to shoppers. Run Product Readiness on a catalog to find products that aren't ready to be sold. Then update those products to fit your readiness guidelines. You can either use the default readiness rules or configure your own rules.

Develop B2C Stores in Developer Edition Orgs

Developer edition orgs are now enabled for B2B and B2C. Previously, you could use a developer org only for B2B stores.

Create a B2B Store Built on Lightning Web Runtime

The new B2B Lightning Web Runtime (LWR) store template uses the same technology and shares components with the B2C store template. The B2B LWR template provides better performance than the B2B Aura template and is easier to customize because large components are broken into smaller building blocks. We recommend that you select the B2B LWR template for new stores and consider migrating existing B2B stores that are built on the Aura template to LWR.

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

Why: The B2B LWR store template also includes a modular checkout component. You can configure every step of your B2B store checkout process with drag-and-drop components in Experience Builder. No flows are required.

How: When you create a store, for Choose the Experience You Love, select **B2B Commerce**.

SEE ALSO:

[Salesforce Help: B2B Commerce Aura to LWR Migration Guide \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: LWR and Aura Store Templates \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Create a Store Using a Template \(can be outdated or unavailable during release preview\)](#)

[Create a B2B Checkout Directly in Experience Builder](#)

Improve SEO with URL Slugs and Redirects (Pilot)

To boost organic traffic on your store, improve search engine optimization (SEO) with new URL configuration solutions. Create SEO-friendly URL snippets, or “slugs,” for each Product and Category page. A URL slug improves SEO by replacing a record ID with relevant and human-readable information in a URL, ensuring that your store’s pages are optimally surfaced in search engines. You can also use dynamic rules, including regular expression pattern matching, to redirect customers from old URLs to new ones.

Where: This change applies to B2B Commerce and B2B2C Commerce LWR sites in Enterprise, 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.

Who: To participate in this pilot, contact Salesforce Customer Support.

SEE ALSO:

[Salesforce Help: SEO Considerations for Store URLs \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Redirect Users to Your Experience Builder Site Pages \(can be outdated or unavailable during release preview\)](#)

[Use Dynamic Redirect Rules in LWR Commerce Stores \(Pilot\)](#)

Use Dynamic Redirect Rules in LWR Commerce Stores (Pilot)

Configure dynamic URL redirect rules that use a pattern to identify a URL from your site and automatically redirect it to a Salesforce B2C Commerce URL. Dynamic rules are helpful especially in cases where you’ve created user-friendly URL slugs for your product pages.

Where: This change applies to Commerce LWR sites in Enterprise, 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.

Who: To participate in this pilot, contact Salesforce Customer Support.

SEE ALSO:

[Salesforce Help: Redirect Users to Your Experience Builder Site Pages \(can be outdated or unavailable during release preview\)](#)

Promotions

Create tiered promotions and apply the highest qualifying tier to a cart. Create more-advanced buy-one-get-one (BOGO) deals. Automatically apply category promotions to variants.

IN THIS SECTION:

[Create Progressive Tiers for a Promotion](#)

Create tiered promotions and apply the highest qualifying tier to a cart. For example, get \$1 off a \$5 purchase, \$5 off a \$10 purchase, or \$10 off a \$25 purchase. Discounts within a tiered promotion must be of the same type, either product or category. Assign a rank to each tier to determine the evaluation order. The lowest ranked tier gets evaluated first. When you create a promotion, select the tiered promotion option. Then create each tier, assign it to the promotion, and use discount and qualifier rules to create the tiered rules.

[Bring on More BOGO Deals](#)

Entice your customers with the lure of a good buy-one-get-one (BOGO) sale. Use discount and qualifier rules to create more-advanced BOGO deals. Add restrictions so that an item receiving a discount can't cost more than the least-expensive qualifying item. Change the discount order so that the least-expensive item is discounted first. Create a multiple-discount promotion that requires all discount types to be met before the promotion is applied. For example, if you buy a shirt, you can get a pair of pants 50% off and a pair of shoes \$10 off. However, all three items must be in the cart before the promotion applies.

[Automatically Apply Category Promotions to Variants](#)

When you assign a parent product to a category, its variation products are eligible for category discounts. For example, you add a blue T-shirt as a variation of the company T-shirt parent product. Then you add the company T-shirt parent product to the Apparel category. When you create a promotion that targets the Apparel category, it automatically includes the blue company T-shirt variation.

Create Progressive Tiers for a Promotion

Create tiered promotions and apply the highest qualifying tier to a cart. For example, get \$1 off a \$5 purchase, \$5 off a \$10 purchase, or \$10 off a \$25 purchase. Discounts within a tiered promotion must be of the same type, either product or category. Assign a rank to each tier to determine the evaluation order. The lowest ranked tier gets evaluated first. When you create a promotion, select the tiered promotion option. Then create each tier, assign it to the promotion, and use discount and qualifier rules to create the tiered rules.

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

SEE ALSO:

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

[Object Reference for the Salesforce Platform: PromotionTier \(can be outdated or unavailable during release preview\)](#)

Bring on More BOGO Deals

Entice your customers with the lure of a good buy-one-get-one (BOGO) sale. Use discount and qualifier rules to create more-advanced BOGO deals. Add restrictions so that an item receiving a discount can't cost more than the least-expensive qualifying item. Change the discount order so that the least-expensive item is discounted first. Create a multiple-discount promotion that requires all discount types to be met before the promotion is applied. For example, if you buy a shirt, you can get a pair of pants 50% off and a pair of shoes \$10 off. However, all three items must be in the cart before the promotion applies.

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

SEE ALSO:

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

Automatically Apply Category Promotions to Variants

When you assign a parent product to a category, its variation products are eligible for category discounts. For example, you add a blue T-shirt as a variation of the company T-shirt parent product. Then you add the company T-shirt parent product to the Apparel category. When you create a promotion that targets the Apparel category, it automatically includes the blue company T-shirt variation.

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

SEE ALSO:

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

Show Related Products on One Product Detail Page

B2C stores and B2B stores created with the LWR template can now show collections of related products on a single product detail page (PDP) using product sets. A product set groups a parent product with multiple related child products. The child products are shown together on the PDP, but each child is priced separately. A shopper can add all the products to the cart in a single operation or selectively add individual child products. B2C stores provide a built-in Product Set component you can use to show product sets on the PDP.

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

SEE ALSO:

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

Search

Deliver AI-powered search results. Spend less time rebuilding the search index with partial reindexing.

IN THIS SECTION:

[Bring Products to Customers with AI-Powered Search](#)

With AI-powered search, your store is better equipped to deliver accurate results for a range of customer queries. AI-powered search uses natural language processing to interpret queries and return relevant results that account for synonyms, alternative spellings, abbreviations, typos, and more. For example, AI-powered search matches terms like "couch" and "sofa," or "jumper" and "sweater," and returns results that meet the searcher's intent.

[Rebuild the Search Index Faster with Partial Reindexing](#)

Quickly rebuild your store's search index after you update products, catalogs, assignment categories, or entitlements using partial reindexing. However, certain changes still require full reindexing. For example, use Full Reindex after creating a store or making structural modifications, such as changing searchable fields, results filters, or sort rules.

[Search Globally with Increased Locale Support](#)

Commerce Search now supports up to 25 locales for a single store. Previously, this limit was 10 locales. If a customer is configured to use a language your store doesn't support, search results are returned in the store's default language.

Bring Products to Customers with AI-Powered Search

With AI-powered search, your store is better equipped to deliver accurate results for a range of customer queries. AI-powered search uses natural language processing to interpret queries and return relevant results that account for synonyms, alternative spellings, abbreviations, typos, and more. For example, AI-powered search matches terms like "couch" and "sofa," or "jumper" and "sweater," and returns results that meet the searcher's intent.

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

How: To activate AI-powered search, enable Commerce Einstein and storefront activity tracking. Then the search algorithm begins training on your store's data. This training process requires time. Expect improvements in search performance to appear after a week.

SEE ALSO:

[Salesforce Help: AI-Powered Search \(can be outdated or unavailable during release preview\)](#)

Rebuild the Search Index Faster with Partial Reindexing

Quickly rebuild your store's search index after you update products, catalogs, assignment categories, or entitlements using partial reindexing. However, certain changes still require full reindexing. For example, use Full Reindex after creating a store or making structural modifications, such as changing searchable fields, results filters, or sort rules.

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

SEE ALSO:

[Salesforce Help: Rebuild the Search Index \(can be outdated or unavailable during release preview\)](#)

Search Globally with Increased Locale Support

Commerce Search now supports up to 25 locales for a single store. Previously, this limit was 10 locales. If a customer is configured to use a language your store doesn't support, search results are returned in the store's default language.

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

SEE ALSO:

[Salesforce Help: Languages Supported for Search Results \(can be outdated or unavailable during release preview\)](#)

Commerce Data Import is Now Asynchronous

Commerce product and related data (product variations, and images) import is now asynchronous. With asynchronous import, you can start an import and perform other tasks while the import completes in the background. Asynchronous imports are also more efficient and offer faster performance. Asynchronous import uses the standard CSV import file format. You can import up to 10,000 products with nine images each in one session.

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

How: From the Product workspace or store home, initiate a product import. You can check the status of an import session and cancel an import in progress, if needed. When an import session finishes, you receive notification and feedback on the import outcome, including any success, warning, and error messages.

SEE ALSO:

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

[Salesforce Help: Import Data for a Store \(can be outdated or unavailable during release preview\)](#)

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

Global Sales

Configure B2B and B2C stores with multiple ship-to countries and multiple currencies. Add a country setting to B2B stores. Create a contact point shipping address for multiple countries. Apply state and province taxes, and assign how they're applied.

IN THIS SECTION:

[Configure Stores to Use Multiple Currencies](#)

B2B and B2C stores now support multiple currencies. When a shopper selects a currency, prices are shown in the selected currency. To offer multiple currencies in a B2C store, use custom code to generate a currency picker on your store. For example, shopper A can shop and purchase in currency A, and shopper B can shop and purchase in currency B. To use multiple currencies in a B2B store, assign a currency to a buyer in their buyer account. You can assign buyer A currency A, and assign buyer B currency B.

[Assign a Country to a B2B Store](#)

You can now assign a country to a B2B store. To add the country field, in the Store Page layout, move the country field into the Localization section.

[Configure Stores with Multiple Ship-to Countries](#)

You can now configure your B2B and B2C stores to support multiple ship-to countries. At checkout, buyers and shoppers can select from a list of available ship-to countries. The shipping address field automatically configures to match the ship-to country's address format.

[Configure Tax Rates by State or Province](#)

Previously, you could tax items only at the country tax rate. Now you can also apply state and province taxes. For countries with both country and state or province tax rates, assign a priority to determine the order in which the taxes are applied.

[Manage Addresses in B2B and B2C Stores](#)

The B2B and B2C stores now include address lists and address form pages. An Admin configures the pages in Commerce Builder. At run time, buyers, buyer managers, and shoppers can access address management functionality where they can review, edit, and add shipping and billing addresses. The country dropdown on the shipping address displays the ship to countries made available for your store. The country dropdown on the billing address displays all countries. If a country isn't selected, the default county is selected.

Configure Stores to Use Multiple Currencies

B2B and B2C stores now support multiple currencies. When a shopper selects a currency, prices are shown in the selected currency. To offer multiple currencies in a B2C store, use custom code to generate a currency picker on your store. For example, shopper A can shop and purchase in currency A, and shopper B can shop and purchase in currency B. To use multiple currencies in a B2B store, assign a currency to a buyer in their buyer account. You can assign buyer A currency A, and assign buyer B currency B.

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

How: On the store's Administration General Settings tab, use the Supported Currency selector to move the currencies for your store from Available to Chosen.

SEE ALSO:

[Salesforce Help: Configure Language, Country, Ship-To Countries, and Currencies for a B2B Store \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Configure Language, Country, Ship-To Countries, and Currencies for a B2C Store \(can be outdated or unavailable during release preview\)](#)

Assign a Country to a B2B Store

You can now assign a country to a B2B store. To add the country field, in the Store Page layout, move the country field into the Localization section.

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

Configure Stores with Multiple Ship-to Countries

You can now configure your B2B and B2C stores to support multiple ship-to countries. At checkout, buyers and shoppers can select from a list of available ship-to countries. The shipping address field automatically configures to match the ship-to country's address format.

Where: This change applies to B2B Commerce and B2B2C Commerce in Enterprise, Unlimited, and Developer editions. If you have a B2B Aura store, the Country field is also shown but does not apply.



Note: The field

How: On the store's Administration General Settings tab, move the ship-to countries that your store supports from Available to Chosen. If the ship-to countries setting isn't available, a Salesforce admin uses Object Manager in Setup to select the Store Page Layout and move the ship-to countries field into the Localization section of the page layout.

SEE ALSO:

[Salesforce Help: Configure Language, Country, Ship-To Countries, and Currencies for a B2B Store \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Configure Language, Country, Ship-To Countries, and Currencies for a B2C Store \(can be outdated or unavailable during release preview\)](#)

Configure Tax Rates by State or Province

Previously, you could tax items only at the country tax rate. Now you can also apply state and province taxes. For countries with both country and state or province tax rates, assign a priority to determine the order in which the taxes are applied.

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

SEE ALSO:

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

Manage Addresses in B2B and B2C Stores

The B2B and B2C stores now include address lists and address form pages. An Admin configures the pages in Commerce Builder. At run time, buyers, buyer managers, and shoppers can access address management functionality where they can review, edit, and add shipping and billing addresses. The country dropdown on the shipping address displays the ship to countries made available for your store. The country dropdown on the billing address displays all countries. If a country isn't selected, the default county is selected.

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

SEE ALSO:

[Salesforce Help: Add Billing and Shipping Addresses for Buyer Accounts for B2B Stores \(can be outdated or unavailable during release preview\)](#)

Checkout

Create and customize checkout for a B2B LWR store. Reduce time to purchase by automatically selecting a customer's default shipping address. Orders are now processed asynchronously for improved performance. Let buyers switch accounts during checkout. Recalculate pricing and inventory at the start of checkout.

IN THIS SECTION:

[Create a B2B Checkout Directly in Experience Builder](#)

When you create a B2B store with the LWR template, you can use drag-and-drop components in Experience Builder to customize every step of checkout. For the Checkout component, choose either a one-page layout or an accordion layout with collapsible sections. Both options include subcomponents that you can configure. Previously, B2B stores used only the Aura template, which requires you to set up flows.

[Show the Default Shipping Address for Speedier Checkout](#)

Save your customers time by preselecting their default shipping address at checkout. A customer can still choose to edit the address, use a different saved address, or add an address. To configure this setting, in the Shipping Address component, select to show only the customer's default address.

[Check Out Using Account Switcher](#)

For B2B stores created with the LWR template, Buyer and Buyer Manager accounts can now use the account switcher to check out and place orders for a B2B account that they manage.

[Configure Inventory and Pricing Integrations for Checkout](#)

Administrators can now configure inventory and pricing integrations for B2B and B2C stores. The integrations run asynchronously at the start of checkout. When a buyer or shopper proceeds to checkout, the products in the cart reflect the pricing and inventory information returned by the integrations.

[Orders Are Processed Asynchronously for Improved Performance](#)

For B2C stores and B2B stores created with the LWR template, orders are now processed asynchronously. Asynchronous processing improves the store's overall performance and responsiveness. A new process handles errors that occur when an order is placed asynchronously.

Create a B2B Checkout Directly in Experience Builder

When you create a B2B store with the LWR template, you can use drag-and-drop components in Experience Builder to customize every step of checkout. For the Checkout component, choose either a one-page layout or an accordion layout with collapsible sections. Both options include subcomponents that you can configure. Previously, B2B stores used only the Aura template, which requires you to set up flows.

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

SEE ALSO:

[Create a B2B Store Built on Lightning Web Runtime](#)

Show the Default Shipping Address for Speedier Checkout

Save your customers time by preselecting their default shipping address at checkout. A customer can still choose to edit the address, use a different saved address, or add an address. To configure this setting, in the Shipping Address component, select to show only the customer's default address.

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

SEE ALSO:

[Checkout](#)

Check Out Using Account Switcher

For B2B stores created with the LWR template, Buyer and Buyer Manager accounts can now use the account switcher to check out and place orders for a B2B account that they manage.

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

Configure Inventory and Pricing Integrations for Checkout

Administrators can now configure inventory and pricing integrations for B2B and B2C stores. The integrations run asynchronously at the start of checkout. When a buyer or shopper proceeds to checkout, the products in the cart reflect the pricing and inventory information returned by the integrations.

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

How: On your store's landing page, select the Administration tile, and then select **Price Check** or **Store Inventory**.

Orders Are Processed Asynchronously for Improved Performance

For B2C stores and B2B stores created with the LWR template, orders are now processed asynchronously. Asynchronous processing improves the store's overall performance and responsiveness. A new process handles errors that occur when an order is placed asynchronously.

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

SEE ALSO:

[Salesforce Help: Preparing Salesforce for Asynchronous Order Processing \(can be outdated or unavailable during release preview\)](#)

Upgrade Cart Components in Your B2C Store

The B2C template includes new cart components built for improved performance and added customization. If you have an existing B2C store, we recommend that you replace your legacy components with the latest options. Legacy cart components continue to work, but no longer receive enhancements.

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

How: On your Cart and Checkout pages in Experience Builder, look for components that are marked as Legacy. The latest component options are available in the component menu. After you remove a Legacy component from a page, you can't add it back. The new components are:

- Cart—Replaces Cart (Legacy)
- Cart Badge—Replaces Cart Badge (Legacy)
- Cart Items—Subcomponent within Cart
- Cart Summary—Replaces Cart Totals (Legacy)
- Checkout Button—Replaces Checkout Button (Legacy)

SEE ALSO:

[Salesforce Help: LWR and Aura Store Templates \(can be outdated or unavailable during release preview\)](#)

Customize Components with Cart Data

Specify which details to show in a customer's cart. On the Cart page of B2B or B2C stores built with the LWR template, some components include a list of expressions that you can add to pull in cart data. For example, you want the Cart Summary component to show the total number of products next to the header. Click the header Text Block, and in the Text or Expression field, enter `Summary {!Cart.Details.totalProductCount}`.

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

SEE ALSO:

[Salesforce Help: Expressions in Commerce Components \(can be outdated or unavailable during release preview\)](#)

Use the Nested Expressions Data Source in the Grid Component

When using the Grid component in an LWR store template in Experience Builder, you now have a third option for a data source to bind data: Nested Expressions. With the Nested Expressions data source, you can bind data nested in the top-level data source.

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

Why: Let's say you create a Product list view in Salesforce called *Hello*, which has eight products in it. When you want to show products on a site, and you pick the *Hello* list view, only the eight products put into the list view show. But let's say that you want to show the price book entry related to those products on the same page. Use the Nested Expressions data source to bind to any price book entry related to those products, even if the price book entries aren't part of a list view. Nested Expressions gives you more flexibility to show data that hasn't been put into list views.

How: The Grid component has three fields when it comes to selecting the Nesting Expressions data source: Data Source, Expression, and Expression Prefix. After selecting the Nesting Expressions as the data source, use the Expression field to bind to a certain set of fields nested within the top-level inherited content. Then, use the Expression Prefix field to define a label to use as the prefix for your expressions. For example, enter "Awesome" in the prefix, and your expressions all begin with `{!Awesome}`. Then, any component that you use within the Grid has the Nested Expression as its bound data.

Configure Menu Items with the User Profile Menu Component

The User Profile Menu component replaces the MyAccount component in B2B and B2C LWR sites. The component provides a unified user experience across desktop and mobile. You can configure guest user and authenticated user options, including authenticated icons. The component supports the account switcher functionality in B2B LWR sites using the newly added menu item type window. You can use the new window menu type to initiate the out-of-the-box account selector or a custom selector.

Where: This change applies to B2B Commerce and B2B2C Commerce in Enterprise, Unlimited, and Developer editions. The component isn't available for B2B Aura stores.

Order Settings Are Now Configured Automatically

Previously, the Commerce setup process required you to configure order settings manually in Salesforce Setup. Now order settings for B2B and B2B2C Commerce licenses are automated. After setup, you can verify the settings.

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

Use More Field Options for Customer Addresses

The B2B and B2C stores Contact Point Address (CPA) form now includes separate fields for First Name, Last Name, Company Name, and Phone Number. The new fields are included in the shipping and billing address forms. The form also supports First Name and Last Name field placement that auto-configures to the selected country's address etiquette.

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

Programmatically Change a Web Store's Site Association

After you copy experience site data between a sandbox and production, or between sandboxes, you can now programmatically associate a web store in the target org with the copied site by updating the corresponding WebStoreNetwork record. You can even change the association while the store is active. The site must use a template that's compatible with the web store type, and the site can't be associated with a store. The site previously associated with the store can be associated with a new store. Previously, you couldn't change a web store's site association.

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

SEE ALSO:

[Object Reference for the Salesforce Platform: WebStoreNetwork \(can be outdated or unavailable during release preview\)](#)

Confirm That Your Products Are Ready to Sell

Use Product Readiness to see which of your products are ready to be sold. Ready products satisfy all recommended criteria by including components such as images and descriptions. These criteria can make products more accessible and appealing to shoppers. Run Product Readiness on a catalog to find products that aren't ready to be sold. Then update those products to fit your readiness guidelines. You can either use the default readiness rules or configure your own rules.

Develop B2C Stores in Developer Edition Orgs

Developer edition orgs are now enabled for B2B and B2C. Previously, you could use a developer org only for B2B stores.

Where: This change applies to B2B2C Commerce Developer editions

SEE ALSO:

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

Omnichannel Inventory

Self-provision the connection between B2C Commerce and Omnichannel Inventory. Import more inventory records in less time, and gain more visibility in shared group reservation counts.

IN THIS SECTION:

[Self-Provision the Connection Between B2C Commerce and Omnichannel Inventory](#)

Use the new B2C Commerce Connections page in Salesforce to provision a connection. You can connect more than one instance of B2C Commerce to Omnichannel Inventory.

[Import More Inventory Records in Less Time](#)

Imported inventory records are now aggregated more efficiently in Omnichannel Inventory, resulting in faster end-to-end processing time. You can now import up to 25 million records in 5 hours or less.

[Gain More Visibility into Shared Group Reservation Counts](#)

You can now get information about group reservation counts in Omnichannel Inventory endpoints when a single location is shared across multiple location groups.

Self-Provision the Connection Between B2C Commerce and Omnichannel Inventory

Use the new B2C Commerce Connections page in Salesforce to provision a connection. You can connect more than one instance of B2C Commerce to Omnichannel Inventory.

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

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**. The Manage Cloud-to-Cloud Connections page is no longer used to manage Omnichannel Inventory connections.

SEE ALSO:

[Salesforce Omnichannel Inventory Implementation Guide](#)

Import More Inventory Records in Less Time

Imported inventory records are now aggregated more efficiently in Omnichannel Inventory, resulting in faster end-to-end processing time. You can now import up to 25 million records in 5 hours or less.

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

SEE ALSO:

[Omnichannel Inventory Headless API Endpoints](#)

Gain More Visibility into Shared Group Reservation Counts

You can now get information about group reservation counts in Omnichannel Inventory endpoints when a single location is shared across multiple location groups.

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

SEE ALSO:

[Manage Location Groups](#)

[B2C Commerce API Reference](#)

Salesforce Order Management

Place orders on behalf of customers with a new UI flow, and identify whether an order summary was created on behalf of a customer. Track and manage packing for online orders. Charge fees in simple returns and cancellations. Import order data from external channels at high scale using Connect API. Provision and deactivate B2C Commerce connections.

IN THIS SECTION:

[Place Orders on Behalf of Customers Using UI Flows](#)

Ordering on behalf of a customer is now easier. Customer service representatives can place orders for shoppers directly using the new Order on Behalf Of UI flow.

[Identify Whether an Order Summary Was Created on Behalf of a Customer](#)

Orders created on behalf of customers are subject to some restrictions, such as not having reservations in Omnichannel Inventory. To identify these orders, use the Order Summary object's new Source Process field. Valid values are OrderOnBehalf and Standard. The standard Create Order Summary flow doesn't set the value, but you can customize your order summary creation process to set it. The Order on Behalf Of flow sets this value to OrderOnBehalf.

[Track and Manage Packing for Online Orders](#)

Store associates can now use the Store Fulfillment App to add items to one or more shipments. If a product can't be shipped, associates can set a reason for rejection before completing the order. After the order is packed, associates can print shipping labels and ship the order.

[Charge Fees for Simple Returns and Cancellations](#)

You can now include fees when processing simple returns and cancellations via Connect REST API, Connect in Apex, or flow core actions. You can also customize the standard RMA, Return Item, and Cancel Item flows to handle fees.

[Automatically Update an Order Payment Summary When Canceling a Payment Authorization](#)

When you call the Payment Authorization Reversal Service on an authorization associated with an order payment summary, it now updates the order payment summary's Available to Capture and Authorization Reversed values.

[Use Salesforce Payments with B2C Commerce Orders](#)

You can now use Salesforce Payments to process payments and refunds when servicing orders from B2C Commerce. The B2C Commerce Integration and High Scale Orders features now ingest the payment data that's required to use Salesforce Payments.

[Provision and Deactivate B2C Commerce Connections via Self-Service](#)

Use the B2C Commerce Connections page in Setup to manage your storefront connections and related features, including Omnichannel Inventory and Cart and Checkout Data, all in one place. You no longer have to contact Salesforce Support to manage these connections. However, to pause a B2C Commerce storefront connection, contact Salesforce Support.

[Deactivate High-Scale Orders Without Disrupting Order Data](#)

A new help topic clarifies how to avoid potential issues with in-progress orders when you deactivate high-scale orders. If you simply turn off the High Scale Orders setting, the B2C Commerce Integration continues ingesting data but Order Summaries aren't created.

[Find Useful Resources for Order Management Developers](#)

The Order Management Developer Guide is enhanced with links to other documentation resources that are useful to Order Management developers. They include Connect API, Salesforce Flow core actions, platform events, and more.

[Import Order Data from External Channels at High Scale \(Developer Preview\)](#)

You can now import order data at high scale from external channels other than B2C Commerce. Using Connect API, make a POST call to the new `/commerce/order-summaries` Connect REST endpoint. The Order Management **High Scale Orders** setting must be active.

[Get Payment Method Information for Each Order](#)

Learn which payment method buyers are using to pay for their purchases. In Order Management, each payment summary shows the payment method and type. For example, a buyer uses the payment method iDeal to make a purchase. In the order payment summary, the payment method entry is an alternative payment method (indicated by PM-APM), and the type is iDeal. If a credit card is used, the payment method is a credit card, and the type can be Visa.

Place Orders on Behalf of Customers Using UI Flows

Ordering on behalf of a customer is now easier. Customer service representatives can place orders for shoppers directly using the new Order on Behalf Of UI flow.

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

SEE ALSO:

[Place an Order on Behalf of a Customer](#)

Identify Whether an Order Summary Was Created on Behalf of a Customer

Orders created on behalf of customers are subject to some restrictions, such as not having reservations in Omnichannel Inventory. To identify these orders, use the Order Summary object's new Source Process field. Valid values are OrderOnBehalf and Standard. The standard Create Order Summary flow doesn't set the value, but you can customize your order summary creation process to set it. The Order on Behalf Of flow sets this value to OrderOnBehalf.

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

SEE ALSO:

[Object Reference for the Salesforce Platform: OrderSummary \(can be outdated or unavailable during release preview\)](#)

Track and Manage Packing for Online Orders

Store associates can now use the Store Fulfillment App to add items to one or more shipments. If a product can't be shipped, associates can set a reason for rejection before completing the order. After the order is packed, associates can print shipping labels and ship the order.

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

SEE ALSO:

[Pack a Fulfillment Order](#)

Charge Fees for Simple Returns and Cancellations

You can now include fees when processing simple returns and cancellations via Connect REST API, Connect in Apex, or flow core actions. You can also customize the standard RMA, Return Item, and Cancel Item flows to handle fees.

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

SEE ALSO:

[Salesforce Help: Charge Return and Cancel Fees \(can be outdated or unavailable during release preview\)](#)

Automatically Update an Order Payment Summary When Canceling a Payment Authorization

When you call the Payment Authorization Reversal Service on an authorization associated with an order payment summary, it now updates the order payment summary's Available to Capture and Authorization Reversed values.

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

SEE ALSO:

[Apex Developer Guide: Payment Authorization Reversal Service API \(can be outdated or unavailable during release preview\)](#)

Use Salesforce Payments with B2C Commerce Orders

You can now use Salesforce Payments to process payments and refunds when servicing orders from B2C Commerce. The B2C Commerce Integration and High Scale Orders features now ingest the payment data that's required to use Salesforce Payments.

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

SEE ALSO:

[Salesforce Order Management Developer Guide: Salesforce B2C Commerce Storefront Order Data Map \(can be outdated or unavailable during release preview\)](#)

Provision and Deactivate B2C Commerce Connections via Self-Service

Use the B2C Commerce Connections page in Setup to manage your storefront connections and related features, including Omnichannel Inventory and Cart and Checkout Data, all in one place. You no longer have to contact Salesforce Support to manage these connections. However, to pause a B2C Commerce storefront connection, contact Salesforce Support.

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

SEE ALSO:

[Salesforce Help: B2C Commerce Connections \(can be outdated or unavailable during release preview\)](#)

Deactivate High-Scale Orders Without Disrupting Order Data

A new help topic clarifies how to avoid potential issues with in-progress orders when you deactivate high-scale orders. If you simply turn off the High Scale Orders setting, the B2C Commerce Integration continues ingesting data but Order Summaries aren't created.

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

SEE ALSO:

[Salesforce Help: Deactivate High-Scale Orders \(can be outdated or unavailable during release preview\)](#)

Find Useful Resources for Order Management Developers

The Order Management Developer Guide is enhanced with links to other documentation resources that are useful to Order Management developers. They include Connect API, Salesforce Flow core actions, platform events, and more.

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

SEE ALSO:

[Salesforce Order Management Developer Guide: Order Management Developer Resources \(can be outdated or unavailable during release preview\)](#)

Import Order Data from External Channels at High Scale (Developer Preview)

You can now import order data at high scale from external channels other than B2C Commerce. Using Connect API, make a POST call to the new `/commerce/order-summaries` Connect REST endpoint. The Order Management **High Scale Orders** setting must be active.

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



Note: This feature is available as a developer preview. It isn't generally available unless or until Salesforce announces its general availability in documentation or in press releases or public statements. All commands, parameters, and other features are subject to change or deprecation at any time, with or without notice.

SEE ALSO:

[Connect REST API Developer Guide: Pending Order Summaries \(Developer Preview\) \(can be outdated or unavailable during release preview\)](#)

Get Payment Method Information for Each Order

Learn which payment method buyers are using to pay for their purchases. In Order Management, each payment summary shows the payment method and type. For example, a buyer uses the payment method iDeal to make a purchase. In the order payment summary, the payment method entry is an alternative payment method (indicated by PM-APM), and the type is iDeal. If a credit card is used, the payment method is a credit card, and the type can be Visa.

Where: This change applies to Order Management in Enterprise, Unlimited, and Developer editions.

How: From the navigation bar in the Order Management Console, select an order and view the order payment summary.

Order Payment Summary		
OPS - 00004515		
Type	Full Name	Balance
ideal		EUR 119.99 (USD 109.08)

Related

Details

▼ Order Payment Summary Information

Full Name

Last Payment Gateway Log

PGL-000000281

Last Payment Gateway Message

Order Summary

00004515

Payment Method

Type

ideal

PM_APM-000000002

SEE ALSO:

[Salesforce Help: View Payment Information for an Order \(can be outdated or unavailable during release preview\)](#)

Salesforce Payments

Offer shoppers a smooth and secure checkout experience with Salesforce Payments, available for Salesforce B2C Commerce and as an application on the Salesforce platform. For B2B stores that use the LWR template, use Salesforce Payments to add credit card support at checkout.

IN THIS SECTION:

[Add Salesforce Payments to B2B Checkout](#)

Give your customers a smooth payment experience for B2B stores created with the LWR template. Use Salesforce Payments to provide credit card support for the template's checkout component.

Add Salesforce Payments to B2B Checkout

Give your customers a smooth payment experience for B2B stores created with the LWR template. Use Salesforce Payments to provide credit card support for the template's checkout component.

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

How: Install the [Salesforce Payments Package for Commerce Cloud](#) on the same site as your B2B store.

SEE ALSO:

[Salesforce Help: B2B Commerce Aura to LWR Migration Guide \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: LWR and Aura Store Templates \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Create a Store Using a Template \(can be outdated or unavailable during release preview\)](#)

Marketplace for Salesforce Commerce

Use the Commerce Marketplace app and invite third-party sellers to sell their products directly to shoppers on your Salesforce Commerce storefront. After integrating your Commerce storefront to the Commerce Marketplace app, you can match third-party sellers' categories and products with the ones offered in your Commerce storefront, as well as approving new seller suggested products. You can also export third-party seller prices into Commerce, and split orders so that each seller receives and fulfills their own. Create a custom shipping cost calculation so that shoppers can select a single delivery method for orders from multiple sellers. The Commerce Marketplace app also offers a Multi-Marketplace solution that allows you to create and manage different Marketplaces.

IN THIS SECTION:

[Harmonize Third-Party Seller Categories and Prices](#)

After the Salesforce Commerce integration is enabled, all your storefront categories are imported into your Marketplace app. You can then match your Marketplace third-party sellers' categories and products with the ones imported from your Salesforce Commerce storefront. Your Marketplace sellers can also propose new categories and products that you can accept or reject.

[Export Third-Party Seller Prices into Salesforce Commerce](#)

After sellers export their catalog to their portal, which is linked to the Marketplace app, you can export the seller catalog into Salesforce Commerce. Sellers can also add the price that they want to charge to their new products and to products offered in your Marketplace catalog.

[Split Sellers' Order](#)

Marketplace stores support multiple sellers who receive different orders. You can now split and import seller orders from your storefront, enabling each seller to receive and fulfill their orders.

[Add Marketplace and Sellers' Shipping Costs](#)

Give your customers a smooth experience ordering products from different sellers in your Marketplace by creating a custom shipping cost calculation. Marketplace stores sell their products while supporting multiple sellers with different delivery methods. Now you can add the shipping costs of different sellers to your Marketplace shipping cost. The Marketplace shipping costs and delivery method are calculated as defined in `MarketplaceDeliverySample.cls`, and the minimum shipping cost of all sellers is added later.

[Create Multiple Marketplaces](#)

Create and manage different Marketplaces within your Commerce Marketplace app to diversify your revenue stream, increase your market share, data insights, and opportunities for cross-promotion.

[Let Shoppers Compare Seller Prices](#)

With the Marketplace Salesforce Commerce integration, your customers are able to compare prices of the same product from multiple sellers and the number of available offers for each item.

Harmonize Third-Party Seller Categories and Prices

After the Salesforce Commerce integration is enabled, all your storefront categories are imported into your Marketplace app. You can then match your Marketplace third-party sellers' categories and products with the ones imported from your Salesforce Commerce storefront. Your Marketplace sellers can also propose new categories and products that you can accept or reject.

Where: This change applies to the Commerce Marketplace Salesforce Commerce Integration.

Export Third-Party Seller Prices into Salesforce Commerce

After sellers export their catalog to their portal, which is linked to the Marketplace app, you can export the seller catalog into Salesforce Commerce. Sellers can also add the price that they want to charge to their new products and to products offered in your Marketplace catalog.

Where: This change applies to the Commerce Marketplace Salesforce Commerce Integration.

Split Sellers' Order

Marketplace stores support multiple sellers who receive different orders. You can now split and import seller orders from your storefront, enabling each seller to receive and fulfill their orders.

Where: This change applies to the Commerce Marketplace Salesforce Commerce Integration.

Add Marketplace and Sellers' Shipping Costs

Give your customers a smooth experience ordering products from different sellers in your Marketplace by creating a custom shipping cost calculation. Marketplace stores sell their products while supporting multiple sellers with different delivery methods. Now you can add the shipping costs of different sellers to your Marketplace shipping cost. The Marketplace shipping costs and delivery method are calculated as defined in `MarketplaceDeliverySample.cls`, and the minimum shipping cost of all sellers is added later.

Where: This change applies to the Commerce Marketplace Salesforce Commerce Integration.

Create Multiple Marketplaces

Create and manage different Marketplaces within your Commerce Marketplace app to diversify your revenue stream, increase your market share, data insights, and opportunities for cross-promotion.

Where: This change applies to the basic managed package and the Commerce Marketplace Salesforce Commerce Integration.

Let Shoppers Compare Seller Prices

With the Marketplace Salesforce Commerce integration, your customers are able to compare prices of the same product from multiple sellers and the number of available offers for each item.

Where: This change applies to the Commerce Marketplace Salesforce Commerce Integration.

Customer Data Platform

Customer Data Platform, formerly Salesforce CDP, helps you connect and unify data across systems, power the connected and personalized marketing experiences that your customers expect, and analyze cross-channel engagement behavior. Extend the use of Customer Data Platform by creating and installing data kits and packages. Activate data profiles to target advertising across Google and Meta. As a partner, manage package versions with the tools you choose.

IN THIS SECTION:

[Accelerated Queries for Tableau](#)

The new Accelerated Queries for Tableau capability performs faster query processing on large and complex datasets. The capability is native to Customer Data Platform and speeds up interactive analytics when customers query data in Tableau from Customer Data Platform.

[Build and Share](#)

Extend the use of Customer Data Platform by creating and installing data kits and packages.

[Activate Segments for Google or Meta Advertising Platforms](#)

Activate audience segments securely in Customer Data Platform to use in targeted Google and Meta advertising campaigns. Use out-of-the-box activation connectors to send audience lists to Google and Meta with just a few clicks.

[Personalize Your Data with Related Attributes \(Generally Available\)](#)

Improve customer communication by using related attributes and filtering on their values to find relevant results for your marketing campaigns. Select a segment and under Activations, click **New**. Select the activation target, contact points, and related attributes. This feature, now generally available, includes some changes since the beta release.

[Use the MobilePush Contact Point for Your Activation](#)

When creating your activation, select the MobilePush contact point to send personalized messages to your customers' smart devices. MobilePush is only available when activating to Marketing Cloud.

[Retain Data After Deleting a Google Cloud Storage Data Stream](#)

You can now delete a Google Cloud Storage (GCS) data stream and retain its associated data lake object (DLO) because the data stream and DLO are decoupled. You can also reuse an existing DLO while configuring a new GCS data stream.

[Refine Match Criteria with More Fuzzy Match Methods](#)

Identity resolution ruleset custom match rule criteria previously offered up to three match methods. Now you can refine the fuzzy match method further by selecting between three levels of fuzzy matching precision.

[Run Identity Resolution Ruleset Jobs at Any Time](#)

Previously, identity resolution ruleset jobs ran automatically once per day. Now you can iterate faster during setup and control the schedule better by manually triggering a ruleset job at any time. The ruleset job runs only if source data, object mappings, or the ruleset's configuration has changed since the last run.

[Write SQL Queries in Multiple Workspaces Using Query Workspaces](#)

Use the new Query Workspaces to write queries for data model objects, data lake objects, and calculated insights in Data Cloud and collaborate with others. You can save and execute SQL queries in multiple workspaces. You can also visualize data in tabular and graph formats. After you install the Query Workspaces package, you can select it in the App Launcher in Data Cloud.

[Nest Operators for Related Attributes](#)

Combine operators for related attributes in segments and activation to create complex filtering logic with nested AND/OR relationships. Previously, nested operators were available only for direct attributes.

Accelerated Queries for Tableau

The new Accelerated Queries for Tableau capability performs faster query processing on large and complex datasets. The capability 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.

Build and Share

Extend the use of Customer Data Platform by creating and installing data kits and packages.

IN THIS SECTION:

[Chain Processes in a Sequence with Workflow Orchestration](#)

Trigger Customer Data Platform processes only when required or when a previous process has finished running. Now you can chain workflow processes that include ingestion (Salesforce CRM and Amazon S3 data streams), segmentation and activation, identity resolution, and calculated insights, and configure the sequence in which they run. For example, you can chain the processes to refresh calculated insights or run segmentation when data ingestion is completed. You can also define your own workflows using Flow Builder.

[Save Time by Updating an Existing Data Kit](#)

You no longer need to create a new data kit when you modify CRM and B2C Commerce data streams or data models and mappings. Instead, you can update an existing data kit. You can also retrieve or deploy the updated data kit from Customer Data Platform with Package Manager in your Salesforce org.

Chain Processes in a Sequence with Workflow Orchestration

Trigger Customer Data Platform processes only when required or when a previous process has finished running. Now you can chain workflow processes that include ingestion (Salesforce CRM and Amazon S3 data streams), segmentation and activation, identity resolution, and calculated insights, and configure the sequence in which they run. For example, you can chain the processes to refresh calculated insights or run segmentation when data ingestion is completed. You can also define your own workflows using Flow Builder.

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

How: When you create a flow, select **Autolaunched Flow (No Trigger)**. On the canvas, click **Add Element**, and then click **Action**. In the left pane, click **CDP**, and then select a CDP action. Enter the label, API name, input values, and then click **Done**.

SEE ALSO:

[Salesforce Help: Orchestrate a Workflow in Customer Data Platform \(can be outdated or unavailable during release preview\)](#)

Save Time by Updating an Existing Data Kit

You no longer need to create a new data kit when you modify CRM and B2C Commerce data streams or data models and mappings. Instead, you can update an existing data kit. You can also retrieve or deploy the updated data kit from Customer Data Platform with Package Manager in your Salesforce org.

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

How: Go to Customer Data Platform Setup. In Tools, click **Data Kits**. Open your data kit, and click **Update**.

SEE ALSO:

[Salesforce Help: Update a Data Kit in Customer Data Platform \(can be outdated or unavailable during release preview\)](#)

Activate Segments for Google or Meta Advertising Platforms

Activate audience segments securely in Customer Data Platform to use in targeted Google and Meta advertising campaigns. Use out-of-the-box activation connectors to send audience lists to Google and Meta with just a few clicks.

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

SEE ALSO:

[Salesforce Help: Create an External Activation Platform Activation Target \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Create Activation for Your External Activation Platform \(can be outdated or unavailable during release preview\)](#)

Personalize Your Data with Related Attributes (Generally Available)

Improve customer communication by using related attributes and filtering on their values to find relevant results for your marketing campaigns. Select a segment and under Activations, click **New**. Select the activation target, contact points, and related attributes. This feature, now generally available, includes some changes since the beta release.

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

SEE ALSO:

[Salesforce Help: Add Related Attributes to a Segment](#)

[Salesforce Help: Related Attributes in Activation](#)

Use the MobilePush Contact Point for Your Activation

When creating your activation, select the MobilePush contact point to send personalized messages to your customers' smart devices. MobilePush is only available when activating to Marketing Cloud.

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

SEE ALSO:

[Salesforce Help: Contact Points and Source Priority Order](#)

[Salesforce Help: Create an Activation for a Segment](#)

[Salesforce Help: MobilePush](#)

Retain Data After Deleting a Google Cloud Storage Data Stream

You can now delete a Google Cloud Storage (GCS) data stream and retain its associated data lake object (DLO) because the data stream and DLO are decoupled. You can also reuse an existing DLO while configuring a new GCS data stream.

Refine Match Criteria with More Fuzzy Match Methods

Identity resolution ruleset custom match rule criteria previously offered up to three match methods. Now you can refine the fuzzy match method further by selecting between three levels of fuzzy matching precision.

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

How: By default, all custom match rule criteria previously using the "Fuzzy Match" match method now use the "Fuzzy Match - Medium Precision" match method. To select a different level of precision, edit your custom match rule criteria.

SEE ALSO:

[Salesforce Help: Fuzzy and Exact Match Methods](#)

Run Identity Resolution Ruleset Jobs at Any Time

Previously, identity resolution ruleset jobs ran automatically once per day. Now you can iterate faster during setup and control the schedule better by manually triggering a ruleset job at any time. The ruleset job runs only if source data, object mappings, or the ruleset's configuration has changed since the last run.

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

How: On the ruleset's record home page, click **Run Now**. You're limited to four runs in any 24-hour period, including manual and automatically triggered jobs.

Write SQL Queries in Multiple Workspaces Using Query Workspaces

Use the new Query Workspaces to write queries for data model objects, data lake objects, and calculated insights in Data Cloud and collaborate with others. You can save and execute SQL queries in multiple workspaces. You can also visualize data in tabular and graph formats. After you install the Query Workspaces package, you can select it in the App Launcher in Data Cloud.

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

SEE ALSO:

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

Nest Operators for Related Attributes

Combine operators for related attributes in segments and activation to create complex filtering logic with nested AND/OR relationships. Previously, nested operators were available only for direct attributes.

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

How: Drag a related attribute filter to the canvas and define your filters. Use the AND or OR operator within the object.

SEE ALSO:

[Salesforce Help: Add Related Attributes to a Segment](#)

[Salesforce Help: Segment Your Data With Attributes](#)

Customization

Save time by managing picklist values in bulk. Enhance your case and lead record pages with Dynamic Forms. See who can access records and why, and better protect your users' personal information with improvements to sharing.

IN THIS SECTION:

[Fields](#)

Manage your inactive picklist values, and save time managing your custom picklists. Bulk deleting of all the inactive values for a picklist field is generally available. The ability to delete, activate, deactivate, or replace multiple custom picklist field values is generally available. Pronouns and Gender Identity are included as optional picklist fields on the Lead, Contact, and Person Account objects.

[Lightning App Builder](#)

Create more flexible Lightning pages with Dynamic Forms, now available for cases and leads, and with dynamic actions, now supported for all standard objects on desktop. Build custom forecast pages to drive accurate forecasts that support your business.

[Sharing](#)

Get more detail about who has access to a record. Enhanced Personal Information Management is now enforced, replacing Hide Personal Information in User Management Settings, and the setting that hides site users' names in the SOAP API is retired.

[Permissions](#)

Automatically or individually grant or remove access to collective users with the User Access Policy feature in beta. Query on delegate administrator access with Tooling API.

[Globalization](#)

Stay up to date with the latest locale formats, locale and country names, and Custom Address Field functionality. Prepare for a new style for Japanese katakana.

External Services

Integrate more APIs seamlessly with increased limits for registrations and actions. Easily monitor your per org limits with usage gauges at the top of the External Services Home page. Specify `charset` for those fussy servers that require it. And in Flow Builder, declaratively describe your endpoint's API details with the HTTP Callout feature (beta) to automatically generate an external service with invocable actions. Connect Salesforce to MuleSoft AnyPoint Platform with fewer clicks from the MuleSoft Services page in Setup.

Salesforce Connect

Connect Salesforce to external data sources managed via GraphQL (Pilot). Explore the setup wizard for Salesforce Connect adapter for Amazon DynamoDB. Find external objects records mapped to Amazon DynamoDB data sources faster with search enhancements.

AppExchange

Identify accessible solutions and diverse-owned businesses using new AppExchange listing badges. Get a better idea of how much a solution costs for your use case with Freemium and Paid Add-on Required pricing details.

General Setup

Return a source text string in reverse order with a new formula function. View changes to activities with field history tracking for events and tasks.

Fields

Manage your inactive picklist values, and save time managing your custom picklists. Bulk deleting of all the inactive values for a picklist field is generally available. The ability to delete, activate, deactivate, or replace multiple custom picklist field values is generally available. Pronouns and Gender Identity are included as optional picklist fields on the Lead, Contact, and Person Account objects.

IN THIS SECTION:

[Clean Up Inactive Picklist Values \(Generally Available\)](#)

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 had to delete inactive values one at a time. This feature is available only for custom picklists with predefined values. This feature is now generally available.

[Bulk Manage Picklist Values \(Generally Available\)](#)

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 only for custom picklists with predefined values. This feature is generally available.

[Prepare for Changes to the Picklist Settings Page](#)

This update is designed to improve org health and performance by restricting the number of inactive picklist values in a custom picklist field. We plan to remove the **Remove upper bound on inactive picklist values** panel from the Picklist Settings page in Setup in Summer '23.

[Capture Inclusive Data with Gender Identity and Pronouns Fields](#)

Boost data quality, build trust, and engage with customers in the ways they self-identify with gender-inclusive fields. Pronouns and Gender Identity are now included as optional picklist fields on the Lead, Contact, and Person Account objects. Use the vetted, default value sets or add your own picklist values to get a full picture of your constituents. Be sure to review any privacy implications of collecting this data before adding the new fields to your page layouts.

Clean Up Inactive Picklist Values (Generally Available)

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 had to delete inactive values one at a time. This feature is available only for custom picklists with predefined values. This feature is now generally available.

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

How: From the Inactive Values section of the picklist field, click **Delete Unused Values**. 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 \(can be outdated or unavailable during release preview\)](#)

Bulk Manage Picklist Values (Generally Available)

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 only for custom picklists with predefined values. This feature is generally available.

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

How: Go to the custom field definition page for the picklist field. In the Values and Inactive Values sections, there's 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**.

SEE ALSO:

[Salesforce Help: Delete, Deactivate, Replace, or Activate Multiple Picklist Values \(can be outdated or unavailable during release preview\)](#)

Prepare for Changes to the Picklist Settings Page

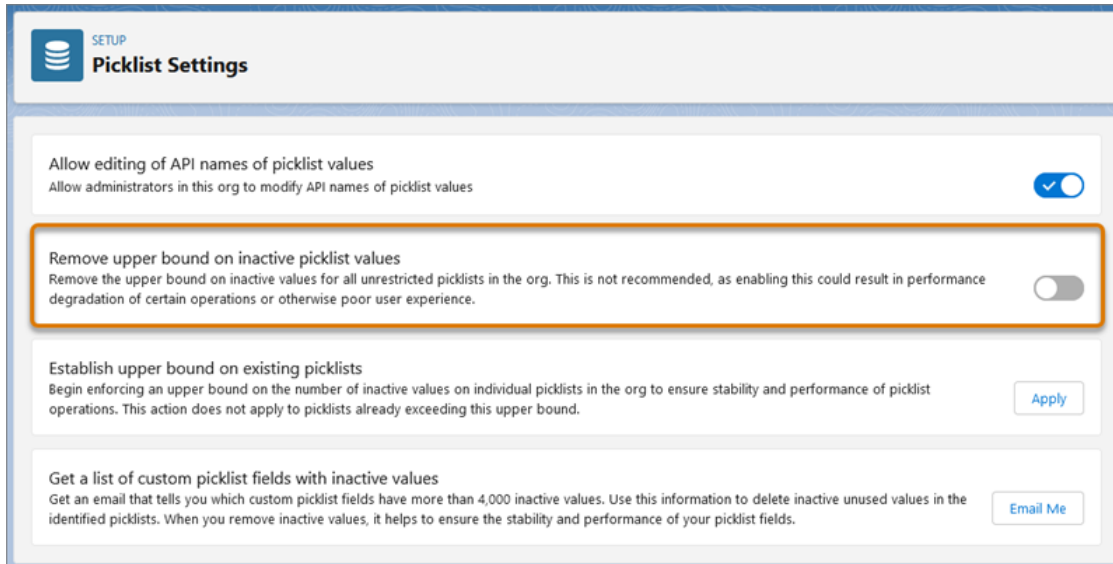
This update is designed to improve org health and performance by restricting the number of inactive picklist values in a custom picklist field. We plan to remove the **Remove upper bound on inactive picklist values** panel from the Picklist Settings page in Setup in Summer '23.

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



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.

How: After the **Remove upper bound on inactive picklist values** panel is removed, you can't remove the upper bound on inactive picklist values, and the maximum number of inactive picklist values for unrestricted picklists is 4,000. Any unrestricted custom picklists that were previously created without limits to the number of inactive values remain. Any new unrestricted custom picklists have a limit of 4,000 inactive values.



SEE ALSO:

[Salesforce Help: Bulk Delete Inactive Picklist Values \(can be outdated or unavailable during release preview\)](#)

Capture Inclusive Data with Gender Identity and Pronouns Fields

Boost data quality, build trust, and engage with customers in the ways they self-identify with gender-inclusive fields. Pronouns and Gender Identity are now included as optional picklist fields on the Lead, Contact, and Person Account objects. Use the vetted, default value sets or add your own picklist values to get a full picture of your constituents. Be sure to review any privacy implications of collecting this data before adding the new fields to your page layouts.

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

How: From Setup, use the Object Manager to manage field-level security, add or edit picklist values, and add the new fields to your page layouts.

SEE ALSO:

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

[Salesforce Help: Manage Fields for a Specific Object \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Add or Edit Picklist Values \(can be outdated or unavailable during release preview\)](#)

Lightning App Builder

Create more flexible Lightning pages with Dynamic Forms, now available for cases and leads, and with dynamic actions, now supported for all standard objects on desktop. Build custom forecast pages to drive accurate forecasts that support your business.

IN THIS SECTION:

[Enhance Case and Lead Record Pages with Dynamic Forms](#)

Make your case and lead record pages more robust by configuring them with Dynamic Forms. Previously, this capability was available only for account, person account, contact, and opportunity record pages.

[Take Advantage of Dynamic Actions for Standard Objects \(Generally Available\)](#)

Add even more flexibility and control to actions on your record pages with dynamic actions for all standard objects, now generally available for desktop. Previously, dynamic actions were generally available only for Account, Case, Contact, Lead, and Opportunity for desktop. Dynamic actions for custom objects are also generally available for desktop and mobile. Assign actions in the Lightning App Builder instead of the page layout, and apply filters to control when and where actions appear for users.

[Build Your Own Forecasts Pages in Lightning App Builder](#)

Customize desktop forecast pages to include all the information that sales leaders require to drive accurate forecasts that support your unique business.

[Add Save Options to Accounts, Cases, and Leads with Dynamic Forms](#)

You can now add a save option with Dynamic Forms when creating, editing, or cloning a case or lead or when editing an account. For example, you can trigger territory assignment rules when saving a new lead. Previously, this option was available only on page layouts.

[See More Records in Dynamic Related Lists](#)

With the Dynamic Related List – Single component, admins define and filter related lists directly from the Lightning App Builder. Like other related lists, dynamic related lists now include a View All link so that users can see a full list of related records. In the full related list, users can also add quick filters and see the filters that their admin applied. Previously, users saw only up to 30 records in a dynamic related list on the record detail page.

[Enhance Your Dynamic Forms-Enabled Record Pages with Custom Address Fields](#)

Improve address data accuracy and your users' experience with custom address fields, now supported in Dynamic Forms. When you create a custom address field on a Dynamic Forms-enabled object, that field is now available in the Fields tab when you edit record pages for that object in Lightning App Builder.

[Pin Important Content on the Right Side of Record Pages](#)

Use the new Pinned Right Sidebar (3 regions) template to create record pages in which you can show important information, such as customer details and chats, on the right side of their pages. Your users, such as customer service representatives, can then verify customer identity over various channels, such as web chat, and access customer chats from one place and avoid switching between subtabs or pages.

[Access Information Easily on Object Record Pages with Screen Readers and Hover](#)

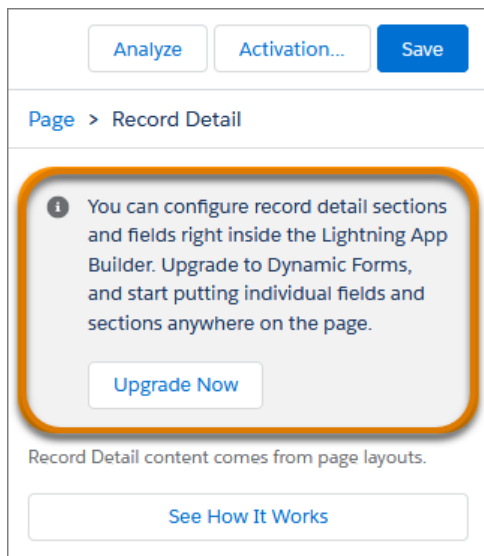
The new layout of the page title template on object record pages makes the record name available for screen readers and hover. Record page titles update when you open the page. And the title appears when you hover over it.

Enhance Case and Lead Record Pages with Dynamic Forms

Make your case and lead record pages more robust by configuring them with Dynamic Forms. Previously, this capability was available only for account, person account, contact, and opportunity record pages.

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

How: In the Lightning App Builder, open a case or lead record page. Click on the new Fields tab, place the Field Section component anywhere on the page, and then drag the fields inside the Field Section. Or automate the process by migrating your Record Detail component to use Dynamic Forms with the click of a button.



SEE ALSO:

[Break Up Record Details in Leads](#)

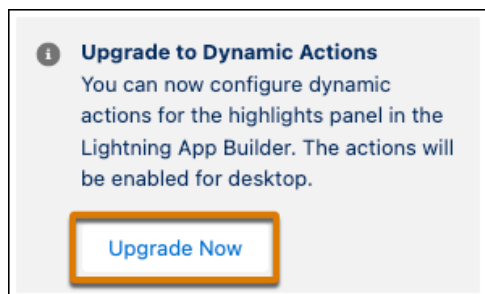
[Salesforce Help: Break Up Your Record Details with Dynamic Forms \(can be outdated or unavailable during release preview\)](#)


Take Advantage of Dynamic Actions for Standard Objects (Generally Available)

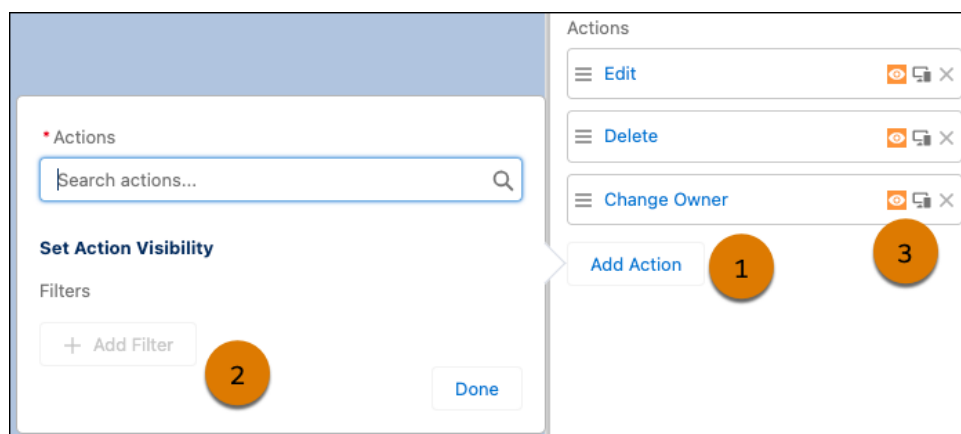
Add even more flexibility and control to actions on your record pages with dynamic actions for all standard objects, now generally available for desktop. Previously, dynamic actions were generally available only for Account, Case, Contact, Lead, and Opportunity for desktop. Dynamic actions for custom objects are also generally available for desktop and mobile. Assign actions in the Lightning App Builder instead of the page layout, and apply filters to control when and where actions appear for users.

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

How: To enable dynamic actions for a standard object on desktop, add or select the Highlights Panel component on the object's record page. In the Highlights Panel properties pane, click **Upgrade Now**, and step through the migration assistant to migrate actions, or start with new ones.



To add an action, click **Add Action** (1) in the properties pane. To assign visibility rules based on record field, device type, and other filters, in the Actions window, choose an action, and click **Add Filter** (2). An eye icon  (3) next to an action's name indicates that visibility rules are applied. If you migrated actions from a page layout, you can modify them in the Actions window.



Build Your Own Forecasts Pages in Lightning App Builder

Customize desktop forecast pages to include all the information that sales leaders require to drive accurate forecasts that support your unique business.

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

SEE ALSO:

[Build Custom Forecasts Pages That Work for Your Business](#)

Add Save Options to Accounts, Cases, and Leads with Dynamic Forms

You can now add a save option with Dynamic Forms when creating, editing, or cloning a case or lead or when editing an account. For example, you can trigger territory assignment rules when saving a new lead. Previously, this option was available only on page layouts.

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

How: The save option appears in the footer of the create, edit, or clone dialog box.



SEE ALSO:

[Salesforce Help: Record Page Save Options in Lightning App Builder \(can be outdated or unavailable during release preview\)](#)

See More Records in Dynamic Related Lists

With the Dynamic Related List – Single component, admins define and filter related lists directly from the Lightning App Builder. Like other related lists, dynamic related lists now include a View All link so that users can see a full list of related records. In the full related list, users can also add quick filters and see the filters that their admin applied. Previously, users saw only up to 30 records in a dynamic related list on the record detail page.

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 \(can be outdated or unavailable during release preview\)](#)

Enhance Your Dynamic Forms-Enabled Record Pages with Custom Address Fields

Improve address data accuracy and your users' experience with custom address fields, now supported in Dynamic Forms. When you create a custom address field on a Dynamic Forms-enabled object, that field is now available in the Fields tab when you edit record pages for that object in Lightning App Builder.

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

SEE ALSO:

[Salesforce Help: Custom Address Fields](#)

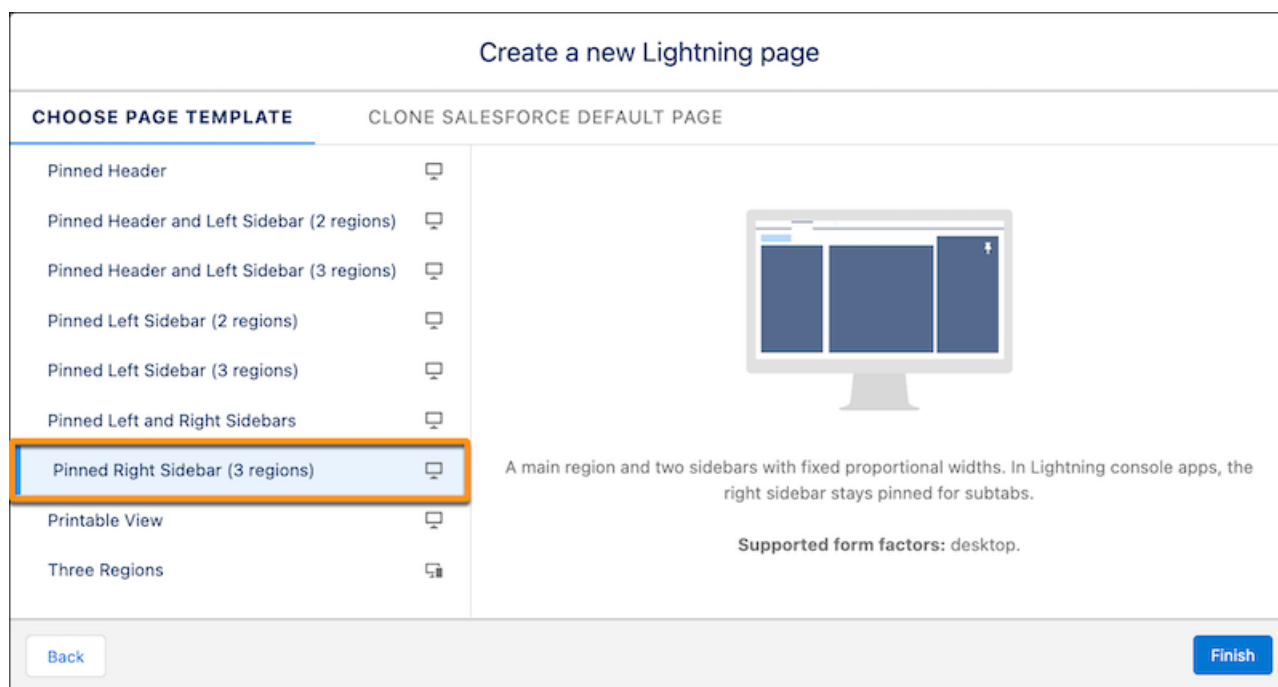
[Salesforce Help: Break Up Your Record Details with Dynamic Forms](#)

Pin Important Content on the Right Side of Record Pages

Use the new Pinned Right Sidebar (3 regions) template to create record pages in which you can show important information, such as customer details and chats, on the right side of their pages. Your users, such as customer service representatives, can then verify customer identity over various channels, such as web chat, and access customer chats from one place and avoid switching between subtabs or pages.

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

How: In Lightning App Builder, create an object record page, and select the **Pinned Right Sidebar (3 regions)** template from the template list. Then add the required components (for example, the Conversation component) to the pinned region.



Access Information Easily on Object Record Pages with Screen Readers and Hover

The new layout of the page title template on object record pages makes the record name available for screen readers and hover. Record page titles update when you open the page. And the title appears when you hover over it.

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

Sharing

Get more detail about who has access to a record. Enhanced Personal Information Management is now enforced, replacing Hide Personal Information in User Management Settings, and the setting that hides site users' names in the SOAP API is retired.

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 personally identifiable information (PII) user record fields. You can also decide which custom and standard user fields are considered PII. This release 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.

[Learn Who Can Access Records and Why](#)

Understanding who can access a record is critical to securing record access in your organization. Check out a record's sharing hierarchy to view who it's shared with. You can also see the user's reason for access and find out if a user's access is blocked by a restriction rule.

[Recalculate Account Sharing Rules Faster](#)

To improve performance, Salesforce is changing the way that automatic sharing calculation works behind the scenes for case and contact objects. We no longer store child implicit share records between accounts and their child case and contact records. Instead, the system dynamically determines whether users can access child case and contact records when they try to access them. Not storing the child implicit share records speeds up ownership and sharing rule recalculation for accounts.

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

Enable Enhanced Personal Information Management to prevent external users, such as portal or community users, from accessing other users' personal information. This feature, which replaces the Hide Personal Information setting, secures more personally identifiable information (PII) user record fields. You can also decide which custom and standard user fields are considered PII. This release 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 release 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**. To view and modify fields that are concealed, click **in this field set**.

For customers who enabled the Hide Personal Information setting, but haven't enabled the Enhanced Personal Information setting, Salesforce hides these personal information fields in user records from external users in Spring '23.

- Alias
- EmployeeNumber
- FederationIdentifier
- SenderEmail
- Signature
- Username
- Division
- Title
- Department
- Extension

When the Show Nicknames preference is enabled, these fields are also hidden.

- Name
- First Name (component of the Name field)
- Last Name (component of the Name field)



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)

[Salesforce Help: Show Nicknames Instead of Full Names in an Experience Cloud Site](#) (can be outdated or unavailable during release preview)

[Release Updates](#)

Learn Who Can Access Records and Why

Understanding who can access a record is critical to securing record access in your organization. Check out a record's sharing hierarchy to view who it's shared with. You can also see the user's reason for access and find out if a user's access is blocked by a restriction rule.

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

How: To see a list of users who have access, click **Sharing Hierarchy** from the Action Menu on the desired record. To see why the user has access to the record or why access is blocked, click **View** next to the user's name.

When you click **View**, all applicable sharing reasons appear, including the names of owner-based and criteria-based sharing rules.

BankBranches > California > Sharing Hierarchy > John Pineapple			
John Pineapple			
1 item			
Shared With	Reason for Access	Relationship	BankBranch Access
Group: PublicGroupA	Custom Object Sharing Rule - BankBranchSharePGA	Group Member	Read Only

If a restriction rule blocks access to the record, a message appears to confirm that access is blocked.

BankBranches > California > Sharing Hierarchy > John Pineapple			
John Pineapple			
1 item			
Shared With	Reason for Access	Relationship	BankBranch Access
A restriction rule blocks access to this record			None

SEE ALSO:

[Salesforce Help: Viewing Which Users Have Access to Your Records in Lightning Experience](#) (can be outdated or unavailable during release preview)

Recalculate Account Sharing Rules Faster


To improve performance, Salesforce is changing the way that automatic sharing calculation works behind the scenes for case and contact objects. We no longer store child implicit share records between accounts and their child case and contact records. Instead, the system dynamically determines whether users can access child case and contact records when they try to access them. Not storing the child implicit share records speeds up ownership and sharing rule recalculation for accounts.

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


When: This functionality is available after January 10, 2023.

Why: Salesforce provides implicit sharing between a parent account and its child objects (cases, contacts, and opportunities). By no longer creating implicit child share records for cases and contacts, performance is improved when updating the following:

- Org-Wide Defaults
- Sharing Rules
- Group Membership
- Manual Sharing
- Account Ownership
- Role Hierarchy
- Role Assignments

 **Note:** Depending on your org's access setup, this change can cause account owners and users that the account is shared with to gain view and edit privileges to case or contact records owned by high-volume Experience Cloud site users.

How: For information on enabling this functionality, contact Salesforce Customer Support.

 **Note:** Using queries that rely on system-generated shares isn't recommended as Salesforce can remove these shares in the process of normal operations. Adjust queries that depend on share records' `RowCause` field being equal to `ImplicitChild` to depend only on manual and user-generated share records. To find out who can access a record, use the record's sharing hierarchy or query the `UserRecordAccess` object.

SEE ALSO:

[Knowledge Article: Faster Account Sharing Recalculation](#)

[Salesforce Help: Viewing Which Users Have Access to Your Records in Lightning Experience \(can be outdated or unavailable during release preview\)](#)

[Object Reference: UserRecordAccess \(can be outdated or unavailable during release preview\)](#)

Permissions

Automatically or individually grant or remove access to collective users with the User Access Policy feature in beta. Query on delegate administrator access with Tooling API.

IN THIS SECTION:

[Query Delegated Group Access via Tooling API](#)

Run API queries on users granted delegated administrator roles to confirm access. With the available objects, you can run queries on members of a delegated group, permissions granted to the delegated group, and users who are members of the delegated group.

[Choose the Permission Sets Display When Setting Field-Level Security \(Beta\)](#)

Now when you set or change field-level security for a field on permission sets, you can view by permission sets with object permissions, or by all permission sets. The view is enhanced so the permission set API name and description displays and columns are sortable.

[Apply and Automate Mass Access with User Access Policies \(Beta\)](#)

Apply user access policies to declaratively grant or remove access to managed package licenses, permission set licenses, permission sets, permission set groups, queues, and groups. Use entitlement-based or user attribute-based criteria to identify users as you build your policies. Automatically apply access when users are created, updated, or both.

Query Delegated Group Access via Tooling API

Run API queries on users granted delegated administrator roles to confirm access. With the available objects, you can run queries on members of a delegated group, permissions granted to the delegated group, and users who are members of the delegated group.

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

SEE ALSO:

[Tooling API New and Changed Objects](#)

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

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

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

Choose the Permission Sets Display When Setting Field-Level Security (Beta)

Now when you set or change field-level security for a field on permission sets, you can view by permission sets with object permissions, or by all permission sets. The view is enhanced so the permission set API name and description displays and columns are sortable.

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.

SEE ALSO:

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

Apply and Automate Mass Access with User Access Policies (Beta)

Apply user access policies to declaratively grant or remove access to managed package licenses, permission set licenses, permission sets, permission set groups, queues, and groups. Use entitlement-based or user attribute-based criteria to identify users as you build your policies. Automatically apply access when users are created, updated, or both.

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



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

Why: For example, you're migrating a group of users from a profile to permission sets and permission set groups. Create filters to identify the users assigned to the profile. Create actions in the user access policy to add access to the appropriate permission sets and permission set groups. Add an action to assign the users to a minimum access profile and remove access to the current profile.

How: For access to the User Access Policies (beta), fill out [this form](#).

Globalization

Stay up to date with the latest locale formats, locale and country names, and Custom Address Field functionality. Prepare for a new style for Japanese katakana.

IN THIS SECTION:

[Update Outdated Country Names](#)

To correspond to the latest official names, these country names are updated in the State and Country/Territories Picklist: Türkiye (formerly Turkey), Eswatini (formerly Swaziland), Czechia (formerly Czech Republic), North Macedonia (formerly Macedonia). We also added the country of Kosovo and the states of Japan. In new orgs, the correct country names automatically appear in the UI. For existing orgs that refer to any of the countries with changed names, edit the country name on the Configure States, Countries, and Territories page.

[Available Country List Was Changed](#)

In accordance with the Salesforce Export Compliance policy, changes were made to available country, time zone, and currency configurations.

[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 and is enforced in Spring '24.

[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). Address formats and the default currency changed for English (Eswatini). For JDK, there are also changes to the date and time formats for Montenegrin locales. Whether you use the ICU or the JDK format, we recommend that you evaluate the changes that affect you for the locales that you use. Then test your filters, code, and components as needed.

[Get Locale Names in Local Languages](#)

To help users select their locale, locale names appear in the corresponding language. For example, the German (Belgium) locale was renamed Deutsch (Belgien).

[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: Arabic, Chinese (Simplified), Croatian, Czech, Danish, Dutch, Finnish, French, German, Greek, Hebrew, Hungarian, Indonesian, Italian, Japanese, Korean, Polish, Portuguese (Brazil), Romanian, Russian, Slovak, Slovenian, Spanish, Spanish (Mexico), Swedish, Turkish, and Ukrainian.

[Enjoy More Custom Address Field Functionality](#)

Some limitations on Custom Address Fields were removed. Unlocked packages and feed tracking are now supported. Salesforce CLI is validated, and custom address fields now are supported for configuring search results for an object.

[Prepare for the Japanese Katakana Style Change \(Release Update\)](#)

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.

[Adopt New Currencies for Croatia and Sierra Leone](#)

Effective January 1, 2023, Croatia joins the European Union and uses the euro (EUR) in place of the Kuna (HRK) as its currency. Effective April 1, 2023, Sierra Leone's currency changes from the old leone (SLL) to the new leone (SLE). If you use the Kuna or old leone in your transactions, update your currencies in Salesforce.

Update Outdated Country Names

To correspond to the latest official names, these country names are updated in the State and Country/Territories Picklist: Türkiye (formerly Turkey), Eswatini (formerly Swaziland), Czechia (formerly Czech Republic), North Macedonia (formerly Macedonia). We also added the country of Kosovo and the states of Japan. In new orgs, the correct country names automatically appear in the UI. For existing orgs that refer to any of the countries with changed names, edit the country name on the Configure States, Countries, and Territories page.

Where: This change applies to Lightning Experience, Salesforce Classic, and all versions of the mobile app in Professional, Performance, and Unlimited editions with the State and Country/Territories Picklist enabled.

SEE ALSO:

[Salesforce Help: Edit State, Country, and Territory Details \(can be outdated or unavailable during release preview\)](#)

Available Country List Was Changed

In accordance with the Salesforce Export Compliance policy, changes were made to available country, time zone, and currency configurations.

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

SEE ALSO:

[Export Compliance](#)

[Salesforce Help: Standard Countries and Territories for Address Picklists \(can be outdated or unavailable during release preview\)](#)

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

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 and is enforced in Spring '24.

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). Address formats and the default currency changed for English (Eswatini). For JDK, there are also changes to the date and time formats for Montenegrin locales. Whether you use the ICU or the JDK format, we recommend that you evaluate the changes that affect you for the locales that you use. Then test your filters, code, and components as needed.

Where: This change applies to Lightning Experience, Salesforce Classic, and all versions of the Salesforce app in all editions, except Database.com.

SEE ALSO:

[Knowledge Article: Salesforce Locale Name Changes in Spring '23](#)

[Knowledge Article: International Components for Unicode \(ICU\) Locale Format Changes in Spring '23](#)

[Knowledge Article: Java Development Kit \(JDK\) Locale Format Changes in Spring '23](#)

[Salesforce Help: Determine Whether Your Org Uses ICU or JDK Locale Formats](#)

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

Get Locale Names in Local Languages

To help users select their locale, locale names appear in the corresponding language. For example, the German (Belgium) locale was renamed Deutsch (Belgien).

Where: This change applies to Lightning Experience, Salesforce Classic, and all versions of the Salesforce app in all editions, except Database.com.

SEE ALSO:

[Knowledge Article: Salesforce Locale Name Changes in Spring '23](#)

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

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: Arabic, Chinese (Simplified), Croatian, Czech, Danish, Dutch, Finnish, French, German, Greek, Hebrew, Hungarian, Indonesian, Italian, Japanese, Korean, Polish, Portuguese (Brazil), Romanian, Russian, Slovak, Slovenian, Spanish, Spanish (Mexico), Swedish, Turkish, and Ukrainian.

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 [Spring '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 \(can be outdated or unavailable during release preview\)](#)

Enjoy More Custom Address Field Functionality

Some limitations on Custom Address Fields were removed. Unlocked packages and feed tracking are now supported. Salesforce CLI is validated, and custom address fields now are supported for configuring search results for an object.

Where: This change applies to Lightning Experience, Salesforce Classic, and all versions of the mobile app in Professional, Performance, and Unlimited editions with the State and Country/Territories Picklist enabled.

SEE ALSO:

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

[Salesforce DX Developer Guide: Unlocked Packages](#)

[Salesforce CLI](#)

Prepare for the Japanese Katakana Style Change (Release Update)

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 \(Japanese Only\)](#)

Adopt New Currencies for Croatia and Sierra Leone

Effective January 1, 2023, Croatia joins the European Union and uses the euro (EUR) in place of the Kuna (HRK) as its currency. Effective April 1, 2023, Sierra Leone's currency changes from the old leone (SLL) to the new leone (SLE). If you use the Kuna or old leone in your transactions, update your currencies in Salesforce.

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

SEE ALSO:

[Knowledge Article: Prepare for Croatia's Currency Change, Effective January 1, 2023](#)

[Knowledge Article: Prepare for Sierra Leone's New Currency, Effective April 1, 2023](#)

External Services

Integrate more APIs seamlessly with increased limits for registrations and actions. Easily monitor your per org limits with usage gauges at the top of the External Services Home page. Specify `charset` for those fussy servers that require it. And in Flow Builder, declaratively describe your endpoint's API details with the HTTP Callout feature (beta) to automatically generate an external service with invocable actions. Connect Salesforce to MuleSoft AnyPoint Platform with fewer clicks from the MuleSoft Services page in Setup.

IN THIS SECTION:

[Register More API Specs with Revised and Expanded Limits](#)

Register even more complex, publicly accessible API specifications, operations, actions, and objects.

[Track External Services Limits](#)

Five visual (flat) gauges at the top of the page now show current usage and maximum values for each per org limit. Previously, when you first entered External Services from Setup, two lines of text at the top of the page showed the number of total actions and active actions registered.

[Specify Charset in the Header](#)

When making external callouts, `charset` in the `Content-Type` header is no longer populated by default. You can optionally specify `charset` in the schema. Previously, `charset=UTF-8` was set by default when no specific `charset` was defined.

[Get External Data from a Web-Based Service into Flow Builder Without Code \(Beta\)](#)

Automate processes with external data by creating Flow Builder actions that call web-based service APIs using HTTP Callout. After you add the details of the API, Flow Builder generates an external service with invocable actions that you can use right away in Flow Builder and across Salesforce. Set up direct integrations as needed without code or a middleware service, such as Mulesoft.

[Connect Salesforce to MuleSoft with Fewer Clicks](#)

Use the new MuleSoft Services page in Setup to log in to MuleSoft AnyPoint Platform before importing REST APIs from Anypoint Exchange as external services. Previously, you created a connected app in MuleSoft and all the necessary credentials and permissions on multiple Setup pages. Now, when you log in to MuleSoft AnyPoint Platform from the MuleSoft Services page, the system creates all these objects for you in the background, drastically reducing the amount of configuration required.

Register More API Specs with Revised and Expanded Limits

Register even more complex, publicly accessible API specifications, operations, actions, and objects.

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

How: This change of scope addresses use cases where you registered certain specs multiple times to include all operations of interest for a given API. Now, in most scenarios, you can use large API specs and choose all operations from within a single registration.

Here are the previous limits and the new, rescope values for Spring '23.

Limit	Previous Value	New Value
Max External Service registrations	25 per org	150 per org
Max schema size	4.0 MB	10.0 MB
Max active operations	625 per org	1,250 per org
Max active objects	625 per org	1,250 per org
Max active and inactive operations	5,000 total per org	10,000 total per org
Max active and inactive objects	5,000 total per org	10,000 total per org
Max properties	None	400,000 total per org

SEE ALSO:

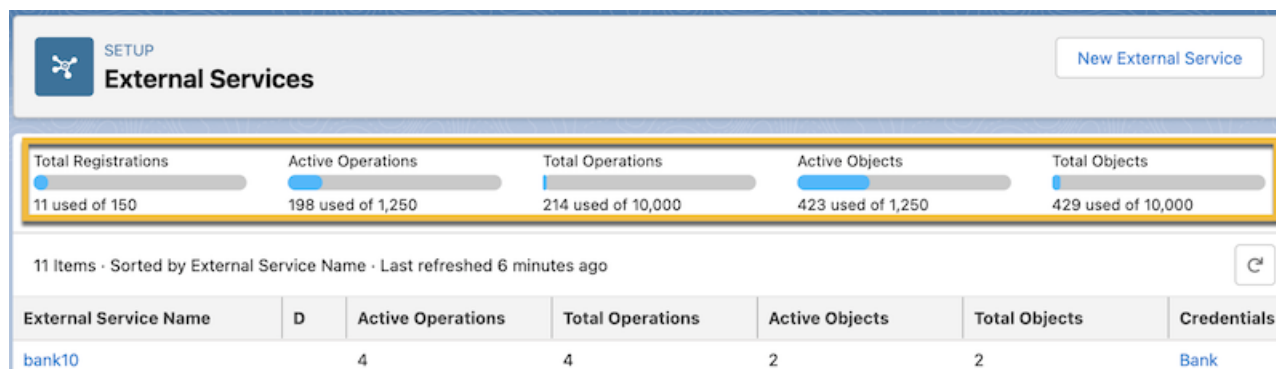
[Salesforce Help: External Services Considerations \(can be outdated or unavailable during release preview\)](#)

Track External Services Limits

Five visual (flat) gauges at the top of the page now show current usage and maximum values for each per org limit. Previously, when you first entered External Services from Setup, two lines of text at the top of the page showed the number of total actions and active actions registered.

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

How: Each gauge shows the current per-org limit.



Specify Charset in the Header

When making external callouts, `charset` in the `Content-Type` header is no longer populated by default. You can optionally specify `charset` in the schema. Previously, `charset=UTF-8` was set by default when no specific `charset` was defined.

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

Why: During an external callout, the `Content-Type` header is used to describe the media type of a resource that can be consumed by the operation, such as `application/json` or `text/plain`.


`charset` is an optional parameter of `Content-Type` that specifies the character encoding of the media type. Setting `charset=UTF-8` by default caused issues with certain callouts that require only the media type and not `charset`.

How: If you don't set a specific value for `charset` in your schema, callouts work as they did before. But if you see a `415 Unsupported Media Type` error, it's most likely that the target server is enforcing a specific format. To make the callouts work, edit your schema to include the appropriate `charset` by following the examples in [Define a Charset in the Schema](#) and register the schema again.

Get External Data from a Web-Based Service into Flow Builder Without Code (Beta)

Automate processes with external data by creating Flow Builder actions that call web-based service APIs using HTTP Callout. After you add the details of the API, Flow Builder generates an external service with invocable actions that you can use right away in Flow Builder and across Salesforce. Set up direct integrations as needed without code or a middleware service, such as Mulesoft.

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

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

Who: To use HTTP Callout, you need the Manage Flow and Customize Applications permissions.

SEE ALSO:

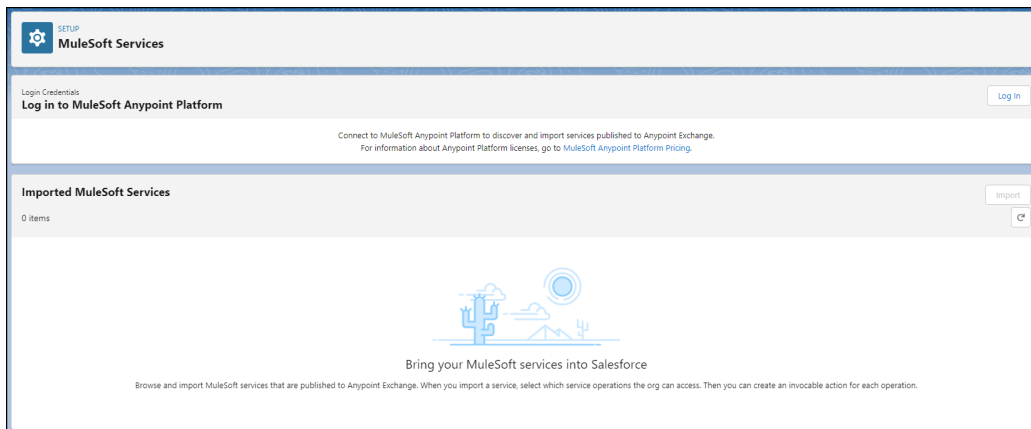
[Salesforce Help: HTTP Callout \(Beta\) \(can be outdated or unavailable during release preview\)](#)

Connect Salesforce to MuleSoft with Fewer Clicks

Use the new MuleSoft Services page in Setup to log in to MuleSoft AnyPoint Platform before importing REST APIs from Anypoint Exchange as external services. Previously, you created a connected app in MuleSoft and all the necessary credentials and permissions on multiple Setup pages. Now, when you log in to MuleSoft AnyPoint Platform from the MuleSoft Services page, the system creates all these objects for you in the background, drastically reducing the amount of configuration required.

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

How: From Setup, in the Quick Find box, enter *MuleSoft*, and then select **MuleSoft > Services**. Click **Log In** and follow the prompts.



Salesforce Connect

Connect Salesforce to external data sources managed via GraphQL (Pilot). Explore the setup wizard for Salesforce Connect adapter for Amazon DynamoDB. Find external objects records mapped to Amazon DynamoDB data sources faster with search enhancements.

IN THIS SECTION:

[Connect External Data Sources Managed via GraphQL from Salesforce \(Pilot\)](#)

Use the new Salesforce Connect adapter for GraphQL to access and integrate data from external sources that expose their capabilities via GraphQL. The new adapter is optimized for AWS AppSync and provides access to AWS data sources, such as Amazon RDS, DocumentDB, and more.

[Set Up Amazon DynamoDB External Data Sources with Fewer Clicks](#)

Use the new setup wizard to define an external data source for Amazon DynamoDB. The wizard walks you through connecting an Amazon DynamoDB data source and integrating the data in Salesforce. Use the guided interface to select the DynamoDB table to map and create an external object in Salesforce from a table with representative sample data.

[Get Support for Amazon DynamoDB Data Sources in Global Search](#)

The external objects that map to Amazon DynamoDB tables are now searchable objects. Use the search box at the top of the page to search by a specific external object or for a global search across Salesforce. You can also use other search tools available in the Salesforce Platform to find external object records mapped to an Amazon DynamoDB table.

Connect External Data Sources Managed via GraphQL from Salesforce (Pilot)

Use the new Salesforce Connect adapter for GraphQL to access and integrate data from external sources that expose their capabilities via GraphQL. The new adapter is optimized for AWS AppSync and provides access to AWS data sources, such as Amazon RDS, DocumentDB, and more.

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



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

Why: The Salesforce Connect adapter uses GraphQL APIs for a modern way to integrate applications. You can use the adapter to:

- Perform queries
- Execute mutations such as insert, update, and delete
- Handle metadata making external object configuration easier

How: To participate in the pilot program, contact your Salesforce account executive.

Set Up Amazon DynamoDB External Data Sources with Fewer Clicks

Use the new setup wizard to define an external data source for Amazon DynamoDB. The wizard walks you through connecting an Amazon DynamoDB data source and integrating the data in Salesforce. Use the guided interface to select the DynamoDB table to map and create an external object in Salesforce from a table with representative sample data.

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

Get Support for Amazon DynamoDB Data Sources in Global Search

The external objects that map to Amazon DynamoDB tables are now searchable objects. Use the search box at the top of the page to search by a specific external object or for a global search across Salesforce. You can also use other search tools available in the Salesforce Platform to find external object records mapped to an Amazon DynamoDB table.

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

AppExchange

Identify accessible solutions and diverse-owned businesses using new AppExchange listing badges. Get a better idea of how much a solution costs for your use case with Freemium and Paid Add-on Required pricing details.

IN THIS SECTION:

[Identify Accessible Solutions and Diverse-Owned Businesses on AppExchange](#)

AppExchange solution listings now show badges indicating accessibility and diverse business ownership, making it easier to determine whether the solution aligns with your company's technical requirements or business values. To qualify as accessible, the provider must verify that the solution meets accessibility standards and upload a conformance report. To qualify as a diverse-owned business, the provider must certify that they're at least 51% owned or operated by members of one or more of these groups: women, veterans, minorities, person(s) with disability(ies), and the LGBTQ community. Providers opt in to sharing accessibility and diverse business ownership details, so this information isn't available on all listings.

[See Whether an AppExchange Solution Fits Your Budget Before You Install It](#)

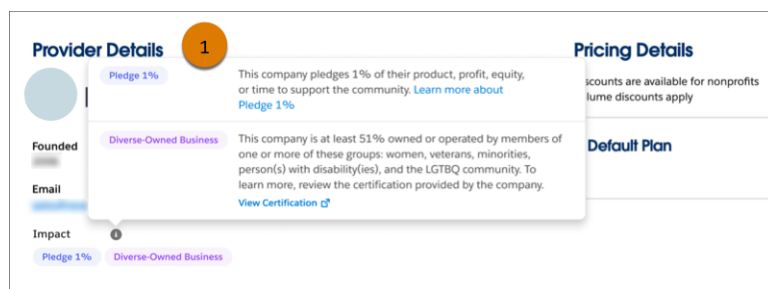
When you're evaluating an AppExchange solution, new Freemium and Paid Add-on Required pricing indicators help you better understand the cost of the solution for your use case. Freemium solutions are free on a limited basis, but you must pay to increase usage, users, or features. Paid Add-on solutions require payment for a product or service that's external to Salesforce. On solution listings, free and paid solutions now provide clearer pricing model descriptions.

Identify Accessible Solutions and Diverse-Owned Businesses on AppExchange

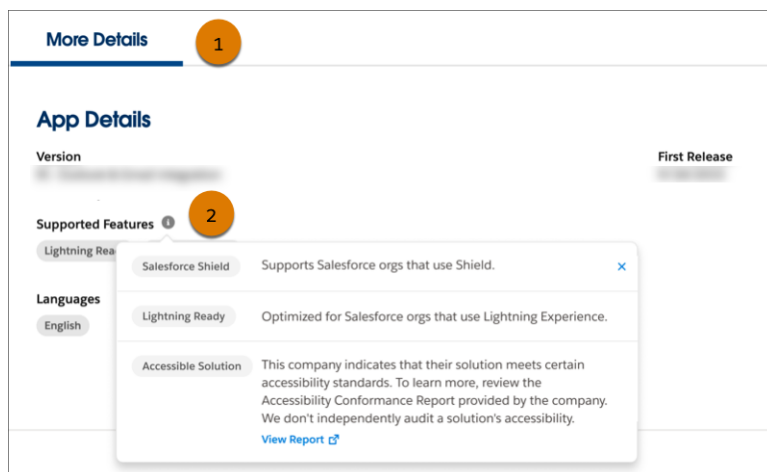
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Where: This change is available for solution listings on the AppExchange website.

How: To check whether a provider is a diverse-owned business, go to a listing, navigate to Provider Details (1), and then click the badge to view the provider's diverse-owned business certification.



To check whether a solution is accessible, click **More Details** (1), navigate to Supported Features (2), and then click the badge to view the solution's accessibility conformance report.

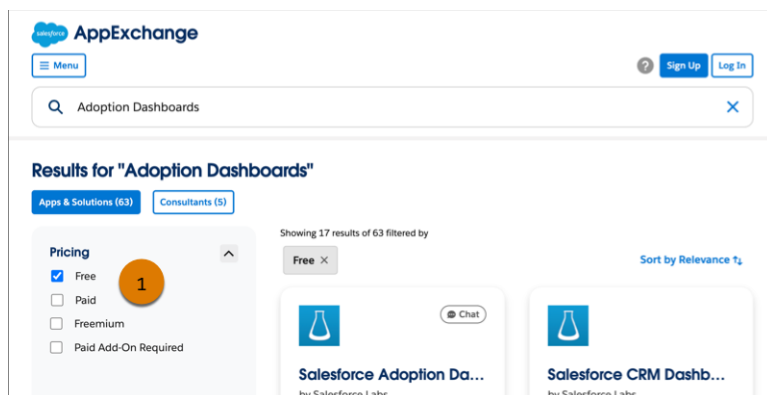


See Whether an AppExchange Solution Fits Your Budget Before You Install It

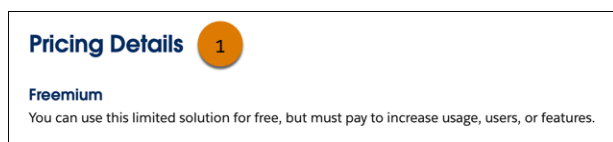
When you're evaluating an AppExchange solution, new Freemium and Paid Add-on Required pricing indicators help you better understand the cost of the solution for your use case. Freemium solutions are free on a limited basis, but you must pay to increase usage, users, or features. Paid Add-on solutions require payment for a product or service that's external to Salesforce. On solution listings, free and paid solutions now provide clearer pricing model descriptions.

Where: This change is available on the AppExchange website.

How: To narrow down AppExchange search results by pricing model, apply pricing filters (1).



To learn about a specific solution's pricing model, go to a listing, and navigate to Pricing Details (1).



General Setup

Return a source text string in reverse order with a new formula function. View changes to activities with field history tracking for events and tasks.

IN THIS SECTION:

[Return Characters in a String in Reverse Order](#)

Use the Reverse function when building formulas to return the characters of a source text string in reverse order.

[Track Field History for Activities](#)

See a list of changes to events and tasks after you turn on field history tracking in the Object Manager. Track up to six fields so that your team can see what's changed in the Related tab for events and tasks. The Activity Record History component is automatically added to default event and task Lightning pages.

Return Characters in a String in Reverse Order

Use the Reverse function when building formulas to return the characters of a source text string in reverse order.

Where: This change applies to all editions.

SEE ALSO:

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

Track Field History for Activities

See a list of changes to events and tasks after you turn on field history tracking in the Object Manager. Track up to six fields so that your team can see what's changed in the Related tab for events and tasks. The Activity Record History component is automatically added to default event and task Lightning pages.

SEE ALSO:

[Get the Play-by-Play with Field History Tracking for Activities](#)

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.

Flow Test

Introduced in API version 56.0, this component represents the parameters and inputs for the flow test.

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](#)

Lightning Web Security is beta for Aura components. Use refs to access elements in shadow DOM and light DOM. Fetch data using the GraphQL wire adapter (pilot).

[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](#)

The user-mode database operations and `ApexTypeImplementor` features are generally available. The DataWeave in Apex feature is in beta. Use the `System.enqueueJob(queueable, delay)` method overload to specify a minimum delay before a queueable job is scheduled for execution. As an admin, set an org-wide default delay in scheduling queueable jobs that were scheduled without a delay parameter. Use the `DescribeFieldResult.getSObjectType()` method to get the `SObjectType` of a source `sObject` describe that was originally retrieved. Run the `Test.testSandboxPostCopyScript()` method as Automated Process user. A release update enables RFC 7230 validation of REST response headers that are defined in Apex via the `RestResponse.addHeader(name, value)` method. As an admin, set the `RestrictCommunityExecAnon` preference to restrict anonymous Apex execution to core users. Nested code block executions are logged correctly with `CODE_UNIT_FINISHED` entries.

[API](#)

API version 57.0 features changes to names for global value set. And versions 21.0 through 30.0 of the Salesforce Platform API are being retired in Summer '23.

[Einstein Vision](#)

Save time and work more efficiently using Einstein Optical Character Recognition (OCR). Quickly extract handwritten text from a document, and map the text to a relevant document layout and associated fields.

[Packaging](#)

Packaging facilitates the development and distribution of business apps. Use second-generation managed packages to create apps to sell and distribute on AppExchange. Use unlocked packages to develop internal business apps.

[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.

[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.

[Monitor and Analyze System Performance with Scale Center \(Beta\)](#)

Scale Center provides self-serve and near real-time access to your Salesforce performance metrics, helping you build and scale apps with confidence. With Scale Center, you can monitor production health and performance metrics, identify scale hotspots and view detailed diagnostics during performance testing, resulting in high-performing apps on the Salesforce platform.

[Salesforce Functions](#)

Salesforce Functions extends the power of Salesforce with elastic compute and language flexibility.

[AppExchange Partners](#)

The AppExchange Partner Console, which is now generally available, provides new ways for you to deliver success to your customers. The Console is home to the suite of tools you use to manage your AppExchange business. Create solution and consultant listings, and get them approved, in the Listing Builder. More quickly navigate security reviews in a new, intuitive wizard. Explore your listing's usage data with Marketplace Analytics in the Partner Console. Use new AppExchange App Analytics features to analyze CRM Analytics recipe usage, explore query usage with operation fields, retrieve clean read counts with package usage summaries, and discover additional CRUD activity.

[Change Data Capture](#)

Receive change events for more objects.

[Platform Events](#)

Publish standard events without using allocations.

[Event Bus](#)

Check out Pub/Sub API enhancements for publishing and subscribing 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

Lightning Web Security is beta for Aura components. Use refs to access elements in shadow DOM and light DOM. Fetch data using the GraphQL wire adapter (pilot).



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:

[Use Lightning Web Security for Lightning Web Components \(GA\) and Aura Components \(Beta\)](#)

Lightning Web Security (LWS) for Aura components (Beta) continues the gradual rollout of the LWS architecture, which was originally announced for Lightning web components in Spring '22. In Winter '23, LWS for Lightning web components was enabled by default in new orgs. In this Spring '23 release, LWS for Aura (beta) is also enabled by default for new orgs.

[Lightning Web Security Enablement for Orgs with No Custom Components](#)

Lightning Web Security (LWS) for Lightning web components (GA) and LWS for Aura (Beta) is enabled by default for orgs that don't contain custom Lightning web components or Aura components. This enablement continues the gradual rollout of the LWS architecture announced in Spring '22. If your org has no custom components, this enablement has no impact. The goal of our gradual LWS rollout is to start with orgs that aren't expected to be affected by LWS and to eventually enable LWS for all orgs. If you subsequently add Lightning web components or Aura components or install a managed package that contains Lightning web components or Aura components, LWS protects those components.

[Evaluate JavaScript for Aura Components in Lightning Web Security Console](#)

Evaluate JavaScript for your Aura components in the Lightning Web Security Console to determine if they can run in Lightning Web Security for Aura components (beta).

[Fetch Data Using the GraphQL Wire Adapter \(Pilot\)](#)

Built on the [Salesforce GraphQL API](#), the GraphQL wire adapter enables you to use UI API enabled objects with the object-level security and field-level security of the current user. The wire adapter is quipped with client-side caching and data management capabilities provided by Lightning Data Service.

[Query DOM Elements with Refs](#)

Now you can use refs to access elements in shadow DOM and light DOM. Refs locate DOM elements without a selector and only query elements contained in a specified template. Previously, you could only use `querySelector()` to locate specific DOM elements.

[Improved Render Time for Lightning Web Components](#)

Render time for your Lightning web components has decreased because of an optimized framework to handle static elements. This change can influence how `style` and `class` attributes of your static nodes are rendered in the DOM. Extra whitespace or unexpected characters sometimes appear in values for those attributes.

[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.

[Build Components in Mixed Shadow Mode \(Developer Preview\)](#)

With mixed shadow mode, Lightning web components can use native shadow DOM even when the synthetic shadow polyfill is applied.

[Use Scoped Styles Only on Light DOM Components in Aura-Based Containers](#)

Except for Experience Cloud sites, CMS content editor, and Sales Enablement environments, all other Aura apps now support only scoped styles in light DOM components.

[Use the Improved Conditional Directives](#)

The `lwc:if`, `lwc:elseif`, and `lwc:else` conditional directives supersede the legacy `if:true` and `if:else` directives.

[View Debug Information for Your Wired Properties](#)

Access debug information for wired properties and methods on a component via custom formatters in Chrome DevTools.

[Scoping in CSS Pseudo-Elements Is Fixed](#)

CSS styles that are defined by selectors with pseudo-elements in synthetic shadow environments are now scoped correctly.

[Disable lwcRuntimeFlags to Improve Lightning Page Security](#)

Setting properties on `lwcRuntimeFlags` no longer affects Lightning Web Components. Previously, you could call the `lwcRuntimeFlags` API to enable or disable features of Lightning Web Components.

[Use the UTAM Browser Extension to Identify Page Objects \(Beta\)](#)

To make it easier to select page objects (POs) when you write a UI test for a Salesforce application page, use UTAM's browser extension for Google Chrome. You get the appropriate set of POs for the page that you're browsing. And the extension identifies which page elements are affected by the methods in a selected PO.

[Generate UTAM Page Objects from HTML Files](#)

The UTAM Generator command-line tool makes it easier for you to create page objects for UI testing. It generates UTAM JSON page objects from HTML files. An input HTML file can be a raw HTML file downloaded from a browser or the HTML source of a web component, such as a Lightning web component.

[Use Improved Linting for UTAM Page Objects](#)

Use linting to statically analyze JSON files to prevent common bad practices, such as duplication of page objects or violations of the encapsulation pattern. All linting rules and error or warning violation types are configurable as lint properties in the UTAM compiler configuration.

[Configure Code Completion for UTAM JSON Page Objects](#)

Most source code editors or IDEs support code completion (IntelliSense) for UTAM JSON page objects either automatically or through configuration by pointing at the schema file. Code completion helps you to quickly pick the appropriate properties available in a page object. The JSON schema for UTAM page objects is available at the Schema Store.

[Synchronize Component Data Without a Page Refresh Using RefreshView API \(Beta\)](#)

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.

[Extend Omni-Channel Softphone Capabilities for Service Cloud Voice](#)

Give your administrators the power to build and customize Omni-Channel widget user interfaces and agent actions using the target tag `lightning__VoiceExtension`.

[Security Enhancements for CSRF Tokens for Lightning Apps \(Release Update\)](#)

This update enforces the generation of a different cross-site request forgery (CSRF) token for each Lightning app, which ensures that a token is used only in its intended context. The update also improves the handling for invalid and expired tokens. This update is new in Spring '23.

[Block Access to Public Apex Constructor in Managed Package from @AuraEnabled Method \(Release Update\)](#)

This update has been canceled.

SEE ALSO:

[Lightning Web Components Developer Guide](#)

[Lightning Aura Components Developer Guide](#)

Use Lightning Web Security for Lightning Web Components (GA) and Aura Components (Beta)

Lightning Web Security (LWS) for Aura components (Beta) continues the gradual rollout of the LWS architecture, which was originally announced for Lightning web components in Spring '22. In Winter '23, LWS for Lightning web components was enabled by default in new orgs. In this Spring '23 release, LWS for Aura (beta) is also enabled by default for new orgs.

Where: This change applies to Lightning Experience in all editions. LWS affects Lightning web components and Aura components in Aura-based Experience Cloud sites. It doesn't affect LWR-based Experience Cloud sites. Scratch orgs also have LWS enabled by default.



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](#).

Lightning Web Security is generally available for Lightning web components.

Why: Lightning Locker has been the default security architecture for Lightning components. Lightning Web Security (LWS) started to replace Lightning Locker for Lightning web components in Spring '22. Now, LWS works for Aura components, too.


How: LWS for Aura (beta) is controlled by the **Use Lightning Web Security for Lightning web components (GA) and Aura components (Beta)** setting in Session Settings in Setup. This setting was called **Use Lightning Web Security for Lightning web**

components in Winter '23 when it applied to LWS for LWC only. In Spring '23, the same setting controls LWS for LWC (GA) and LWS for Aura (beta). The setting is enabled by default in new orgs.

The **Use Lightning Web Security for Lightning web components (GA) and Aura components (Beta)** setting applies to all existing and new custom Lightning web components and Aura components.

The primary method for testing is manual validation testing of your components in a sandbox. We recommend that you set up two identical sandboxes. Enable the LWS setting in Setup for one of the orgs only. Using this approach, you can compare your Aura components' behavior with LWS versus Lightning Locker. If you have only one sandbox, enable or disable the LWS setting in Setup each time you want to compare the behaviors with LWS versus Lightning Locker.

If you plan to deploy existing or packaged Lightning web components or Aura components to an org, test first in a sandbox with LWS enabled.

 **Note:** If your org had the **Use Lightning Web Security for Lightning web components** setting enabled before Spring '23 and your org contains custom Aura components, LWS remains enabled and continues to affect your Lightning web components only. But your org is excluded from LWS for Aura (beta), so it doesn't affect your Aura components in Spring '23. The goal of our gradual LWS rollout is to start with orgs that aren't expected to be affected by LWS and to eventually enable LWS for all orgs.

The exclusion of some orgs from LWS for Aura (beta) applies to production orgs only. LWS for Aura (beta) is enabled in Spring '23 sandboxes so that you can start testing your Aura components.

This table summarizes whether LWS for LWC (GA) and LWS for Aura (beta) features are in effect in a Spring '23 production org, if LWS was previously enabled in the org in Winter '23.

Custom Components in Org	LWS for LWC (GA)	LWS for Aura (Beta)
None	✓	✓
LWC only	✓	✓
Aura only	✓	✗
LWC and Aura	✓	✗

 **Important:** If LWS wasn't enabled in a production org in Winter '23, when the org admin enables it in Spring '23, LWS for LWC (GA) and LWS for Aura (beta) are both in effect.

SEE ALSO:

[Lightning Web Security Enablement for Orgs with No Custom Components](#)

[Evaluate JavaScript for Aura Components in Lightning Web Security Console](#)

[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: Evaluate JavaScript in Lightning Web Security Console](#)

[Lightning Web Security FAQ](#)

Lightning Web Security Enablement for Orgs with No Custom Components

Lightning Web Security (LWS) for Lightning web components (GA) and LWS for Aura (Beta) is enabled by default for orgs that don't contain custom Lightning web components or Aura components. This enablement continues the gradual rollout of the LWS architecture announced in Spring '22. If your org has no custom components, this enablement has no impact. The goal of our gradual LWS rollout is to start with orgs that aren't expected to be affected by LWS and to eventually enable LWS for all orgs. If you subsequently add Lightning web components or Aura components or install a managed package that contains Lightning web components or Aura components, LWS protects those components.

Where: This change applies to Lightning Experience in all editions. LWS affects Lightning web components and Aura components in Aura-based Experience Cloud sites. It doesn't affect LWR-based Experience Cloud sites. Scratch orgs also have LWS enabled by default.

Why: Lightning Locker has been the default security architecture for Lightning components. LWS started to replace Lightning Locker for Lightning web components in Spring '22. Now, LWS works for Aura components, too.

How: The **Use Lightning Web Security for Lightning web components (GA) and Aura components (Beta)** setting is in Session Settings in Setup. You can return the org to use Lightning Locker for Lightning web components and Aura components by deselecting the setting. If your org has no Lightning components, there's no reason to return to Lightning Locker. Consider returning to Lightning Locker only if components exhibit issues with LWS enabled.

If you plan to add custom or packaged Lightning web components or Aura components to your org, be sure to test first in a sandbox with LWS enabled. If your Lightning components aren't working properly with LWS and you can't solve the issue, open a Support case.

SEE ALSO:

[Use Lightning Web Security for Lightning Web Components \(GA\) and Aura Components \(Beta\)](#)

[Evaluate JavaScript for Aura Components in Lightning Web Security Console](#)

[Lightning Web Components Developer Guide: Lightning Web Security](#)

[Lightning Web Components Developer Guide: Enable Lightning Web Security in an Org](#)

[Lightning Web Security FAQ](#)

Evaluate JavaScript for Aura Components in Lightning Web Security Console

Evaluate JavaScript for your Aura components in the Lightning Web Security Console to determine if they can run in Lightning Web Security for Aura components (beta).

Where: This change applies to the [Lightning Web Security Console](#) in the Lightning Component Library.

Why: Lightning Web Security (LWS) started to replace Lightning Locker for Lightning web components in Spring '22. Now, LWS for Aura (beta) enables you to try LWS with your Aura components. LWS applies similar distortions to Aura components and Lightning web components. However, the runtime environment is different for the component types, which can cause LWS to block some properties in Aura components that are allowed in LWC. The LWS Console enables you to specify the component type before you evaluate your code.

How: Select Aura on the LWC/Aura slider in the LWS Console before you evaluate the JavaScript for an Aura component.


SEE ALSO:

[Use Lightning Web Security for Lightning Web Components \(GA\) and Aura Components \(Beta\)](#)

[Lightning Web Components Developer Guide: Evaluate JavaScript in Lightning Web Security Console](#)


Fetch Data Using the GraphQL Wire Adapter (Pilot)

Built on the [Salesforce GraphQL API](#), the GraphQL wire adapter enables you to use UI API enabled objects with the object-level security and field-level security of the current user. The wire adapter is quipped with client-side caching and data management capabilities provided by Lightning Data Service.

 **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.

Where: This change applies to custom Lightning web components in Lightning Experience, Experience Builder sites, and all versions of the Salesforce mobile app. To use the GraphQL wire adapter with your custom components, use Enterprise, Performance, Unlimited, and Developer editions.

How:

 **Note:** [Lightning Web Security \(LWS\) must be enabled](#) on page 182 before you can use the GraphQL wire adapter. We recommend enabling LWS first in sandbox or pre-production orgs to test.

Pass in a GraphQL query and a list of variables to the GraphQL wire adapter. The GraphQL wire adapter accepts a GraphQL document and a variables map. You can import an identifier and pass in a configuration for the properties on your component. The parameters are:

- **query**—(Required) Parsed GraphQL query. Parse the query using the `gql` JavaScript template literal function. `gql` parses the GraphQL query into a format that the wire adapter can use. `gql` isn't reactive. If you include `${ }` string interpolation constructs, they're evaluated one time only when the template literal is expanded.
- **variables**—A key-value pair of dynamic values for the `gql` query. Use `variables` with a getter function so the wire adapter can react to changes.
- **operationName**—The name of the operation that you want to perform in the query. For improved debugging on the server-side that easily identifies different GraphQL requests, we recommend labeling your queries with `query operationName` instead of using the shorthand syntax `query`. For example, `query bigAccounts` or `query serviceReports`.

Let's say you want to query accounts that start with a specific name.


```
import { LightningElement, wire } from 'lwc';
import { gql, graphql } from 'lightning/uiGraphQLApi';

export default class ExampleGQL extends LightningElement {
  @wire(graphql, {
    query: gql`
      query AccountInfo {
        uiapi {
          query {
            Account(where: { Name: { like: "United%" } }) @category(name:
"recordQuery") {
              edges {
                node {
                  Name @category(name: "StringValue") {
                    value
                    displayValue
                  }
                }
              }
            }
          }
        }
      }
    `
  })
```

```

        }
    }
}
propertyOrFunction
}

```

 **Note:** Use `@category` metaschema directives to enable Lightning Data Service (LDS) to share cached data with other non-GraphQL adapters. Omitting the `@category` directives can cause LDS to return inconsistent data to components. The directives are necessary for the pilot but we expect to remove them in a future release.

To enable the wire adapter to react to data changes, include the `variables` parameter with a getter function. For example, return a list of accounts that match a minimum amount based on the `AnnualRevenue` field.

```

import { LightningElement, wire } from 'lwc';
import { gql, graphql } from 'lightning/uiGraphQLApi';

export default class AccountsGQL extends LightningElement {
    records;
    errors;
    minAmount = '1000000';

    @wire(graphql, {
        query: gql`
            query myOperationName($minAmount: Currency) {
                uiapi {
                    query {
                        Account(where: { AnnualRevenue: { gte: $minAmount } })
                    }
                }
            }
        `,
        variables: '$myVariables',
        operationName: 'myOperationName',
    })
    graphqlQueryResult({ data, errors }) {
        if (data) {
            this.records = data.uiapi.query.Account.edges.map(edge => edge.node);
        }
        this.errors = errors;
    }

    get myVariables() {

```

```

    return {
      minAmount: this.minAmount
    };
  }
}

```

Lightning Data Service doesn't require different wire adapters for each query that's defined in the GraphQL schema, unlike the other wire adapters. To explore the GraphQL API schema, we recommend reviewing the schema documentation via introspection using the [Altair GraphQL client](#).



Note: To maintain compatibility with the [GraphQL response specification](#), the GraphQL wire adapter uses `errors` instead of `error`, unlike other LWC wire adapters.

SEE ALSO:

[GraphQL API Developer Guide: Query Records with GraphQL](#)

[Lightning Web Components Developer Guide: lightning/uiGraphQLApi Wire Adapters and Functions \(Pilot\) \(can be outdated or unavailable during release preview\)](#)

Query DOM Elements with Refs

Now you can use refs to access elements in shadow DOM and light DOM. Refs locate DOM elements without a selector and only query elements contained in a specified template. Previously, you could only use `querySelector()` to locate specific DOM elements.

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

How: First, add the `lwc:ref` directive to your element and assign it a value. To call that reference, use `this.refs`. In this example, the `<div>` element has the directive `lwc:ref="myDiv"`, which `this.refs` references to access the `<div>` at runtime.

```

<template>
  <div lwc:ref="myDiv"></div>
</template>

```

```

export default class extends LightningElement {
  renderedCallback() {
    console.log(this.refs.myDiv);
  }
}

```

If you call `this.refs` for a nonexistent ref, it returns `undefined`. If the template contains duplicate `lwc:ref` directives, `this.refs` references the last directive. For a component with more than one template, `this.refs` refers to the most recently rendered template.

SEE ALSO:

[Lightning Web Components Developer Guide: Access Elements the Component Owns](#)

[Lightning Web Components Developer Guide: Light DOM \(Beta\)](#)

Improved Render Time for Lightning Web Components

Render time for your Lightning web components has decreased because of an optimized framework to handle static elements. This change can influence how `style` and `class` attributes of your static nodes are rendered in the DOM. Extra whitespace or unexpected characters sometimes appear in values for those attributes.

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.

How: For example, previously, the attribute `highlight yellow` rendered as shown.

```
<div class="highlight yellow">
```

Now that attribute can render with an extra space.

```
<div class=" highlight yellow">
```

We recommend updating code that uses `style` or `class` attributes, which can be affected by this change. Previously, you could query elements with an exact class name.

```
document.querySelector('[class="highlight yellow"]')
```

Revise the query to use a selector that disregards whitespace changes.

```
document.querySelector('.highlight.yellow')
```

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.



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.

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.

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.

 **Important:** We don't recommend using light DOM if you're working with sensitive data. Using light DOM exposes your components to DOM scraping. You don't get the benefits that come with shadow DOM encapsulation, which prevents unauthorized access into the shadow tree.


SEE ALSO:

[Lightning Web Components Developer Guide: Light DOM \(Beta\)](#)

Build Components in Mixed Shadow Mode (Developer Preview)

With mixed shadow mode, Lightning web components can use native shadow DOM even when the synthetic shadow polyfill is applied.

Where: This change applies to custom Lightning web components in Lightning Experience, Experience Builder sites, and all versions of the Salesforce mobile app. This change also applies to Lightning web components open source.

 **Note:** Mixed shadow mode is available as a developer preview. This feature isn't generally available unless or until Salesforce announces its general availability in documentation or in press releases or public statements. All commands, parameters, and other features are subject to change or deprecation at any time, with or without notice. Don't implement functionality developed with these commands or tools.

Why: All major browsers now support [shadow DOM](#). Salesforce maintains the [synthetic shadow polyfill](#) for legacy browsers such as older versions of Microsoft Edge. To simplify development and testing, the polyfill is used even on browsers that support shadow DOM. With mixed shadow mode, you gain the speed and efficiency of using native shadow as much as possible in your app. And you can more readily migrate to use native shadow fully in the future.

How: Mixed shadow mode is disabled by default. Contact Salesforce Customer Support to enable mixed shadow mode.

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)

Use Scoped Styles Only on Light DOM Components in Aura-Based Containers

Except for Experience Cloud sites, CMS content editor, and Sales Enablement environments, all other Aura apps now support only scoped styles in light DOM components.

Where: This change doesn't apply to Experience Cloud sites, CMS content editor, and Sales Enablement environments. This change applies to all other Aura apps that use light DOM Lightning web components.

Light DOM 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.

SEE ALSO:

[Lightning Web Components Developer Guide: Light DOM \(Beta\)](#)

[Lightning Web Components Open Source Developer Guide: Light DOM \(Beta\)](#)

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

Use the Improved Conditional Directives

The `lwc:if`, `lwc:elseif`, and `lwc:else` conditional directives supersede the legacy `if:true` and `if:else` directives.

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: With the `lwc:if`, `lwc:elseif`, and `lwc:else` conditional directives, the property getters are accessed only one time per instance of the directive.

```
<!-- conditionalExample.html -->
<template>
  <template lwc:if={isTemplateOne}>
    This is template one.
  </template>
  <template lwc:else>
    This is template two.
  </template>
```

Both `lwc:elseif` and `lwc:else` must be immediately preceded by a sibling `lwc:if` or `lwc:elseif`.

Pass in an expression to `lwc:if` and `lwc:elseif`, but not to `lwc:else`.

If `expression1` returns a truthy, none of the other property getters are accessed.

```
<!-- example.html -->
<template>
  <template lwc:if={expression1}>
```

```

        Statement 1
    </template>
    <template lwc:elseif={expression2}>
        Statement 2
    </template>
    <template lwc:else>
        Statement 3
    </template>
</template>


```

Previously, chaining `if:true` and `if:false` blocks introduced performance cost and resulted in the property getters getting called multiple times.

```

<!-- legacyConditional.html -->
<template>
    <!-- Replace if:true with lwc:if -->
    <template if:true={isTemplateOne}>
        This is template one.
    </template>
    <!-- Replace if:false with lwc:else -->
    <template if:false={isTemplateOne}>
        This is template two.
    </template>
</template>

```

 **Important:** The legacy `if:true` and `if:else` directives are no longer recommended as we intend to deprecate and remove these directives in the future. We recommend that you replace their usage with the new conditional directives to future-proof your code.

Consider these guidelines when working with the `lwc:if`, `lwc:elseif`, and `lwc:else` conditional directives.

- Use the conditional directives on nested `<template>` tags, `<div>` tags, or other HTML elements, and on your custom components tags like `<c-custom-cmp>`.
- You can't precede `lwc:elseif` or `lwc:else` with text or another element. Whitespace is ignored between the tags when the whitespace is a sibling of the conditional directive. For example, you can't have a `<div>` tag that comes after `lwc:if` and before `lwc:else`.
- Complex expressions like `!condition` or `object?.property?.condition` aren't supported. To evaluate complex expressions, use a getter in your JavaScript class.

SEE ALSO:

[Lightning Web Components Open Source Developer Guide: Render DOM Elements Conditionally \(can be outdated or unavailable during release preview\)](#)

View Debug Information for Your Wired Properties

Access debug information for wired properties and methods on a component via custom formatters in Chrome DevTools.


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.

Why: Previously, to debug data received with a wired property, you had to use a wired function to return your data and inspect the deconstructed data and `error` properties.

How: Consider a wired property that looks like this.

```
import { LightningElement, wire } from 'lwc';
import getContactList from '@salesforce/apex/ContactController.getContactList';

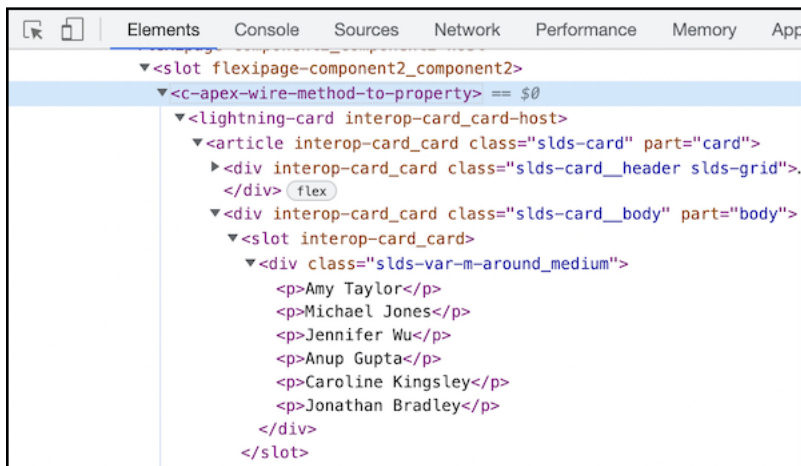
export default class ApexWireMethodToProperty extends LightningElement {
  @wire(getContactList) contacts;
}
```

 **Note:** For a full example, see the `apexWireMethodToProperty` component in the [lwc-recipes](#) repo.

To start debugging your wire adapter:

1. [Enable debug mode in your org.](#)
2. [Open Chrome DevTools, and then enable custom formatters.](#)
3. Find your code in the Sources panel.

Next, inspect your component using `this` or inspect the rendered custom element. To inspect the rendered custom element, click the `<c-apex-wire-method-to-property>` element in the Elements panel of Chrome DevTools.



After you click the element, open the Console panel and enter `$0` to return the debug information..



Each wired property or method returns information with the following shape:

- `data`—The last value returned by the wire adapter.
- `config`—The last configuration object reported to the wire adapter.
- `context`—Only for context wire adapters.

- `isDataProvisionedForConfig`—A boolean that specifies whether the data provisioned by the wire adapter corresponds to the config. Returns `true` if the adapter emits data after a config was reported.

SEE ALSO:

[Lightning Web Components Developer Guide: Debug Wire Adapters \(can be outdated or unavailable during release preview\)](#)

Scoping in CSS Pseudo-Elements Is Fixed

CSS styles that are defined by selectors with pseudo-elements in synthetic shadow environments are now scoped correctly.

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 and scoped styles in light DOM.

How: Before Spring '23, the extra space before CSS pseudo-elements like `::after` and `::before` caused incorrect styling on descendants.

```
* ,
  ::before, /* Note the extra space before the pseudo-element */
  ::after {
    box-sizing: border-box;
  }
```

Previously, the example compiled to these CSS selectors. The resulting CSS wasn't scoped properly in synthetic shadow environments in which the styles were applied to all descendants, including those elements you don't own.

```
*[x-app_app],
[x-app_app] ::before,
[x-app_app] ::after {
  box-sizing: border-box;
}
```

In Spring '23, the incorrect behavior is fixed and the CSS pseudo-elements with the extra space before the pseudo-elements compile to these CSS selectors.

```
*[x-app_app],
[x-app_app]::before,
[x-app_app]::after {
  box-sizing: border-box;
}
```

Disable `lwcRuntimeFlags` to Improve Lightning Page Security

Setting properties on `lwcRuntimeFlags` no longer affects Lightning Web Components. Previously, you could call the `lwcRuntimeFlags` API to enable or disable features of Lightning Web Components.

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

How: For example, the change prevents these statements from enabling [mixed shadow mode \(developer preview\)](#).

```
lwcRuntimeFlags.ENABLE_MIXED_SHADOW_MODE = true // No effect, won't enable mixed shadow mode
window.lwcRuntimeFlags.ENABLE_MIXED_SHADOW_MODE = true // No effect, won't enable mixed shadow mode
```

Use the UTAM Browser Extension to Identify Page Objects (Beta)

To make it easier to select page objects (POs) when you write a UI test for a Salesforce application page, use UTAM's browser extension for Google Chrome. You get the appropriate set of POs for the page that you're browsing. And the extension identifies which page elements are affected by the methods in a selected PO.

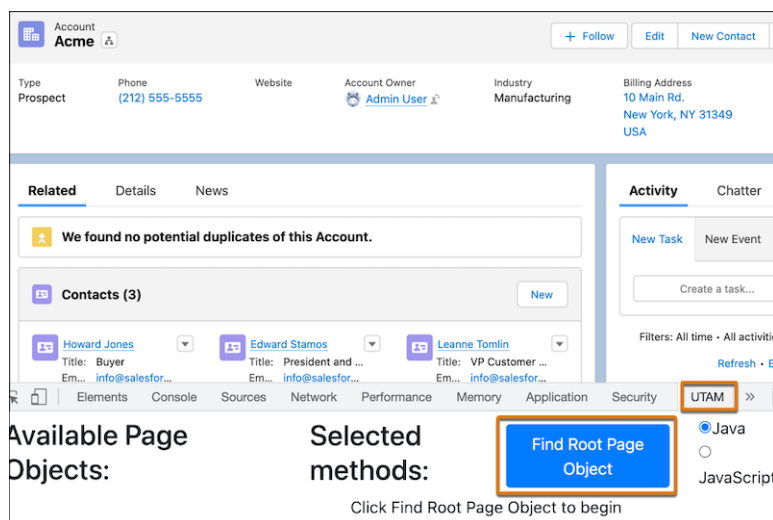


Note: This feature is a Beta Service. Customer may opt to try such Beta Service in its sole discretion. Any use of the Beta Service is subject to the applicable Beta Services Terms provided at [Agreements and Terms](#).

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

How: Install the UTAM browser extension from the [Chrome Web Store](#).

The browser extension adds a UTAM tab to Chrome's developer tools.



For more information, see utam.dev.

Generate UTAM Page Objects from HTML Files

The UTAM Generator command-line tool makes it easier for you to create page objects for UI testing. It generates UTAM JSON page objects from HTML files. An input HTML file can be a raw HTML file downloaded from a browser or the HTML source of a web component, such as a Lightning web component.

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

How: UTAM Generator is published in npm. For more information, see utam.dev.

Use Improved Linting for UTAM Page Objects

Use linting to statically analyze JSON files to prevent common bad practices, such as duplication of page objects or violations of the encapsulation pattern. All linting rules and error or warning violation types are configurable as lint properties in the UTAM compiler configuration.

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

How: Linting runs during page object generation. Linting results are reported at the end of the generation process. For more information, see utam.dev.

Configure Code Completion for UTAM JSON Page Objects

Most source code editors or IDEs support code completion (IntelliSense) for UTAM JSON page objects either automatically or through configuration by pointing at the schema file. Code completion helps you to quickly pick the appropriate properties available in a page object. The JSON schema for UTAM page objects is available at the Schema Store.

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


How: The JSON schema for UTAM page objects is available at the [Schema Store](#).

To configure your IDE, such as Visual Studio Code, for code completion, see [utam.dev](#).

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

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.

 **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: RefreshView API updates the data for a specific hierarchy of components, known as a view, without reloading an entire page. This refresh ensures complete synchronization with data externally sourced by components that subscribe to the refresh event in that view. RefreshView API 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`.

RefreshView API can refresh data for Salesforce platform containers as well as custom components.

Extend Omni-Channel Softphone Capabilities for Service Cloud Voice

Give your administrators the power to build and customize Omni-Channel widget user interfaces and agent actions using the target tag `lightning__VoiceExtension`.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions. Available in Salesforce orgs with these [telephony models](#):

- Service Cloud Voice with Amazon Connect
- Service Cloud Voice with Partner Telephony
- Service Cloud Voice with Partner Telephony from Amazon Connect

How: To use a Lightning Web Component in the Voice Extension page, add the `lightning__VoiceExtension` target to the component's Lightning Web Component bundle. See the `LightningComponentBundle` page of the Metadata API Developer Guide and the [Lightning Web Components Dev Guide](#) for more information about the `VoiceExtension` metadata type. [See the Service Cloud Voice Implementation Guide](#) for detailed configuration steps.

Security Enhancements for CSRF Tokens for Lightning Apps (Release Update)

This update enforces the generation of a different cross-site request forgery (CSRF) token for each Lightning app, which ensures that a token is used only in its intended context. The update also improves the handling for invalid and expired tokens. This update is new in Spring '23.

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

When: This update is new in Spring '23 and will be enforced in Summer '23. The update is enabled for all new orgs created during or after 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: CSRF is a web application vulnerability where a malicious application causes a user's client to perform an unwanted action on a trusted site that the user is authenticated for.

A CSRF token is a random and unique value generated by the server. A CSRF token is the most common prevention technique because it requires an attacker to know the value of the CSRF token used.

How: To test this update, we recommend working in a sandbox.

From Setup, in the Quick Find box, enter *Release Updates*, and then select **Release Updates**. For Security Enhancements for CSRF Tokens for Lightning Apps, follow the testing and activation steps.

SEE ALSO:

[Trailhead: Mitigate Cross-Site Request Forgery Release Updates](#)

Block Access to Public Apex Constructor in Managed Package from @AuraEnabled Method (Release Update)

This update has been canceled.

When: This update was canceled and no longer appears in the Release Updates page in Setup.

SEE ALSO:

[Apex Developer Guide: Access Modifiers](#)
[Lightning Web Components Developer Guide: Expose Apex Methods to Lightning Web Components](#)
[Lightning Aura Components Developer Guide: AuraEnabled Annotation](#)
[Release Updates](#)

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:

[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.

[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 Expression Language Evaluations in <script> and <style> Contexts in Visualforce Pages and Components \(Release Update\)](#)

This update has been canceled.

[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.

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](#)

[Visualforce Developer Guide: Cross Site Scripting \(XSS\)](#)

[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](#)

[Release Updates](#)

Escape Expression Language Evaluations in <script> and <style> Contexts in Visualforce Pages and Components (Release Update)

This update has been canceled.

When: This update was canceled. Don't enable it.

How: The attribute `shouldAlwaysEscapeExpressionLanguage` will be disabled soon. Don't add it to your Visualforce pages or components. If you already added `shouldAlwaysEscapeExpressionLanguage=True` to a Visualforce page or component, `<script>` and `<style>` contexts will keep being escaped until the Summer '23 release.

To ensure the security of your Visualforce pages and components, complete the following steps before then.

1. Reintroduce any manual escaping that you removed from your Visualforce pages and components' code for this release update.
2. Delete the attribute `shouldAlwaysEscapeExpressionLanguage` from your Visualforce pages or components.

If you revised code in a Visualforce page or component in response to this update, but you didn't add the attribute `shouldAlwaysEscapeExpressionLanguage`, revert your changes.

SEE ALSO:

[Visualforce Developer Guide: apex:page](#)

[Visualforce Developer Guide: apex:component](#)

[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.

SEE ALSO:

[Release Updates](#)

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.

SEE ALSO:

[Release Updates](#)

Apex

The user-mode database operations and `ApexTypeImplementor` features are generally available. The DataWeave in Apex feature is in beta. Use the `System.enqueueJob(queueable, delay)` method overload to specify a minimum delay before a queueable job is scheduled for execution. As an admin, set an org-wide default delay in scheduling queueable jobs that were scheduled without a delay parameter. Use the `DescribeFieldResult.getSObjectType()` method to get the `SObjectType` of a source `sObject` describe that was originally retrieved. Run the `Test.testSandboxPostCopyScript()` method as Automated Process user. A release update enables RFC 7230 validation of REST response headers that are defined in Apex via the `RestResponse.addHeader(name, value)` method. As an admin, set the `RestrictCommunityExecAnon` preference to restrict anonymous Apex execution to core users. Nested code block executions are logged correctly with `CODE_UNIT_FINISHED` entries.

For more information on these enhancements, see the [Apex Developer Guide](#) and the [Apex Reference Guide](#).

IN THIS SECTION:

[Secure Apex Code with User Mode Database Operations \(Generally Available\)](#)

The new `Database` and `Search` methods support an `accessLevel` parameter that lets you run database and search operations in user mode instead of in the default system mode. This feature, now generally available, includes some changes since the last release. 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 and it always applies sharing rules. In system mode, the class sharing keywords control the sharing rules.

[Find Which Apex Classes Implement an Interface \(Generally Available\)](#)

`ApexTypeImplementor` is now generally available and is updated since the beta release. Use the object to find Apex classes that directly or indirectly implement an interface. Using a SOQL query, you can get information about public or global Apex implementors.

[Use DataWeave in Apex to Enable Data Transformation to Different Formats \(Beta\)](#)

DataWeave in Apex, now in beta, enhances native Apex data transformation support by integrating the Mulesoft 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.

[Use the System.enqueueJob Method to Specify a Delay in Scheduling Queueable Jobs](#)

A new optional override adds queueable jobs to the asynchronous execution queue with a specified minimum delay (0–10 minutes). Using the `System.enqueue(queueable, delay)` method ignores any org-wide enqueue delay setting. The delay is ignored during Apex testing.

[Specify an Org-Wide Default Delay in Scheduling Queueable Jobs](#)

Admins can define a default delay (1–600 seconds) in scheduling queueable jobs that were scheduled without a delay parameter. Use the delay setting as a mechanism to slow default queueable job execution. If the setting is omitted, Apex uses the standard queueable timing with no added delay.

[Dynamically Pass Bind Variables to a SOQL Query](#)

With the new `Database.queryWithBinds`, `Database.getQueryLocatorWithBinds`, and `Database.countQueryWithBinds` methods, the bind variables in the query are resolved from a Map parameter directly with a key rather than from Apex code variables.

[Discover the Source SObject of a DescribeFieldResult Instance](#)

Use the new `getSObjectType()` method to get the `SObjectType` of a `Schema.DescribeFieldResult` object. The returned type is that of the source sObject describe object that was originally retrieved, eliminating the need for additional mechanisms to determine parent relationships.

[Run the SandboxPostCopy Script as Automated Process User](#)

Test the `SandboxPostCopy` script with the same user access permissions as used by post-copy tasks during sandbox creation. Using the same permissions enables the test to better simulate the actual usage of the class and to uncover potential issues.

[Enforce RFC 7230 Validation for Apex RestResponse Headers \(Release Update\)](#)

When this update is enabled, regardless of API version, REST response headers defined in Apex via the `RestResponse.addHeader(name, value)` method have the header names validated based on RFC 7230. The update is available starting in Spring '23.

[Restrict Anonymous Apex Access to Core Users](#)

By using the `RestrictCommunityExecAnon` preference, admins can restrict anonymous Apex execution from usage by external users. The feature is enabled by default in new orgs but disabled in existing orgs to avoid disrupting customer usage. When enabled, sites, portal, and community users can't execute anonymous Apex regardless of any other user permissions that are set.

[Discover Enhanced Debug Logs in Nested Execution Contexts](#)

The end of each code block execution is now correctly logged in nested executions. Previously, debug logs were sometimes not updated with `CODE_UNIT_FINISHED` entries.

[Static Variables Are Reset Within a Transaction Between Groups of Platform Event–Triggered Flow Interviews](#)

To better protect your data and users, Salesforce changed the behavior of Apex static variables that are set by Apex code invoked by platform event–triggered flows and processes. Now Salesforce resets the values of those static variables within a single transaction between the execution of groups of flow interviews that run for different users. If the flow- or process-invoked Apex code sets any static variables, make sure you don't depend on those static variable values to persist across the entire transaction when the transaction includes multiple users' flow interviews. For example, don't use those static variables to store a complete count of something across the transaction.

[Suppress Non-Global Properties with toString\(\)](#)

The default `toString()` implementation of Apex objects only includes member variables that are visible in the current namespace. Non-global properties are suppressed from output when customers invoke `toString()`, either implicitly or explicitly, on managed Apex types. To keep the non-global state of the object visible in debug output, you can explicitly override the `toString()` method. This `toString()` implementation is a versioned behavior change in API v57.0 and later versions.

SEE ALSO:

[Apex: New and Changed Items](#)

Secure Apex Code with User Mode Database Operations (Generally Available)

The new `Database` and `Search` methods support an `accessLevel` parameter that lets you run database and search operations in user mode instead of in the default system mode. This feature, now generally available, includes some changes since the last release. 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 and it always applies sharing rules. In system mode, the class sharing keywords control the sharing rules.

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

How: You can indicate the mode of the operation by using `WITH USER_MODE` or `WITH SYSTEM_MODE` in your SOQL query. This example specifies user mode.

```
List<Account> acc = [SELECT Id FROM Account WITH USER_MODE];
```

Database operations can specify user or system mode. This example inserts a new account in user mode.

```
Account acc = new Account(Name='test');
insert as user acc;
```


The new `AccessLevel` class represents the two modes that Apex runs database operations in. Use this new class to define the execution mode as user mode or system mode.

We introduced the beta user mode feature in the Summer '22 release and added more beta features in the Winter '23 release. The two beta releases included this initial set of overloaded `System.Database` and `System.Search` methods that perform DML and query operations.

- `Database.query` method
- `Database.countQuery` method
- `Database.getQueryLocator` methods
- `Search.query` method
- Database DML methods (`insert`, `insertAsync`, `insertImmediate`, `update`, `updateAsync`, `updateImmediate`, `upsert`, `merge`, `delete`, `deleteAsync`, `deleteImmediate`, `undelete`, and `convertLead`)

We added these new methods in this GA release.

- `Database.queryWithBinds`
- `Database.getQueryLocatorWithBinds`
- `Database.countQueryWithBinds`

 **Note:** Checkmarx, the [AppExchange Security Review](#) source code scanner, hasn't yet been updated with this new Apex feature. Until it's updated, Checkmarx can generate false positives for field or object level security violations that require exception documentation.

SEE ALSO:

[Apex Developer Guide: Enforce User Mode for Database Operations \(can be outdated or unavailable during release preview\)](#)

Find Which Apex Classes Implement an Interface (Generally Available)

`ApexTypeImplementor` is now generally available and is updated since the beta release. Use the object to find Apex classes that directly or indirectly implement an interface. Using a SOQL query, you can get information about public or global Apex implementors.

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

How: Here are some considerations that have an impact on what implementors are returned.

- ApexTypeImplementor considers access modifiers based on the context, such as the namespace from which the ApexTypeImplementor entity is queried.
 - In installed managed packages, you get information about all global implementors in the org, and public implementors from the managed package itself.
 - ApexTypeImplementor appropriately filters classes that are annotated with `@Deprecated`. For example, it respects a class's package version dependency settings when queried from that class.
- ApexTypeImplementor returns implementors when `ApexClass.IsValid` is set to `False` (invalid classes) in addition to when it's set to `True`. Classes that don't compile or execute can be returned. An implementor class is guaranteed to be usable only if `ApexClass.IsValid` is set to `True` for the implementor.

This example demonstrates how an interface allows flexibility in a configuration, record, or user-driven selection of the rounding strategy to apply. The multiple implementations of the interface can be discovered using ApexTypeImplementor and the specific implementation chosen based on user requirements.

```
// Common interface that all rounding strategies will implement
public interface RoundingStrategy {
    Decimal round(Decimal toRound);
}

public abstract class RoundingStrategies {
    public class Ceiling implements RoundingStrategy {
        public Decimal round(Decimal toRound) {
            return toRound.round(System.RoundingMode.CEILING);
        }
    }

    public class HalfDown implements RoundingStrategy {
        public Decimal round(Decimal toRound) {
            return toRound.round(System.RoundingMode.HALF_DOWN);
        }
    }

    public class TwoDecimalPlaces implements RoundingStrategy {
        public Decimal round(Decimal toRound) {
            return toRound.setScale(2, System.RoundingMode.HALF_UP);
        }
    }
}

List<ApexTypeImplementor> interfaceImpls = [
    SELECT ClassName, ClassNameNamespacePrefix
    FROM ApexTypeImplementor
    WHERE InterfaceName = 'RoundingStrategy' and IsConcrete=true];

// For example, an Admin could be presented with a list of Apex classes
// that could be applied. Simulated selection of 2 decimal places
ApexTypeImplementor selectedRoundingStrategy = interfaceImpls[2];
System.assertEquals('RoundingStrategies.TwoDecimalPlaces',
    selectedRoundingStrategy.ClassName);
```

```
// Create an instance of the class that implements the interface
RoundingStrategy rs = (RoundingStrategy)
Type.forName(selectedRoundingStrategy.ClassNamespacePrefix,
    selectedRoundingStrategy.ClassName).newInstance();

Decimal rounded = rs.round(7.1459);
System.assertEquals(7.15, rounded);
```

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

DataWeave in Apex, now in beta, enhances native Apex data transformation support by integrating the Mulesoft 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: This feature is a Beta Service. Customer may opt to try such Beta Service in its sole discretion. Any use of the Beta Service is subject to the applicable Beta Services Terms provided at Agreements and Terms. You can provide feedback and suggestions for the DataWeave in Apex feature in the [Trailblazer Community](#). The beta release of DataWeave in Apex supports packaging of DataWeave scripts within a namespace. However, you can only access scripts within a package, not across different namespaces.

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

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.

For every DataWeave script, an inner class of type `DataWeaveScriptResource.ScriptName`, which extends the `DataWeave.Script` class, is generated. You can use the generated `DataWeaveScriptResource.ScriptName` class in lieu of the actual script name. DataWeave scripts that are currently being referenced via this inner class can't be deleted.

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 = new DataWeaveScriptResource.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"}
```

Use the System.enqueueJob Method to Specify a Delay in Scheduling Queueable Jobs

A new optional override adds queueable jobs to the asynchronous execution queue with a specified minimum delay (0–10 minutes). Using the `System.enqueue(queueable, delay)` method ignores any org-wide enqueue delay setting. The delay is ignored during Apex testing.


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

How: Here are some cases where it can be beneficial to adjust the timing before the queueable job runs.

- If the external system is rate-limited and can be overloaded by chained queueable jobs that are making rapid callouts.
- When polling for results, and executing too fast can cause wasted usage of the daily async Apex limits.

This example adds a job for delayed asynchronous execution by passing in an instance of your class implementation of the `Queueable` interface for execution. There's a minimum delay of 5 minutes before the job is executed.

```
Integer delayInMinutes = 5;
ID jobId = System.enqueueJob(new MyQueueableClass(), delayInMinutes);
```

 **Warning:** When you set the delay to 0 (zero), the queueable job is run as quickly as possible. With chained queueable jobs, implement a mechanism to slow down or halt the job if necessary. Without such a fail-safe mechanism in place, you can rapidly reach the daily async Apex limit.

SEE ALSO:

[Apex Reference Guide: enqueueJob\(queueable, delay\)](#) (can be outdated or unavailable during release preview)

[IdeaExchange: Allow queueable jobs to have a configurable delay](#)

Specify an Org-Wide Default Delay in Scheduling Queueable Jobs

Admins can define a default delay (1–600 seconds) in scheduling queueable jobs that were scheduled without a delay parameter. Use the delay setting as a mechanism to slow default queueable job execution. If the setting is omitted, Apex uses the standard queueable timing with no added delay.

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 *Apex Settings*, and then enter a value (1–600 seconds) for **Default minimum enqueue delay (in seconds) for queueable jobs that do not have a delay parameter**. To enable this feature programmatically with Metadata API, see [ApexSettings](#) in the *Metadata API Developer Guide*.

A minimum delay specified using the org preference doesn't apply to jobs that are enqueued using the `System.enqueue(queueable, delay)` method.

Dynamically Pass Bind Variables to a SOQL Query

With the new `Database.queryWithBinds`, `Database.getQueryLocatorWithBinds`, and `Database.countQueryWithBinds` methods, the bind variables in the query are resolved from a Map parameter directly with a key rather than from Apex code variables.

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

How: In this example, the SOQL query uses a bind variable for an Account name. Its value (Acme Inc.) is passed in to the method using the *nameBind* Map. The *accountName* variable isn't (and doesn't have to be) in scope when the query is executed within the method.

```
public static List<Account> simpleBindingSoqlQuery(Map<String, Object> bindParams) {
    String queryString =
        'SELECT Id, Name ' +
        'FROM Account ' +
        'WHERE name = :name';
    return Database.queryWithBinds(
        queryString,
        bindParams,
        AccessLevel.USER_MODE
    );
}

String accountName = 'Acme Inc.';
Map<String, Object> nameBind = new Map<String, Object>{'name' => accountName};
List<Account> accounts = simpleBindingSoqlQuery(nameBind);
System.debug(accounts);
```

SEE ALSO:

[Apex Reference Guide: Database Methods \(can be outdated or unavailable during release preview\)](#)

[IdeaExchange: Dynamic SOQL binding expression support to match static SOQL](#)

Discover the Source SObject of a DescribeFieldResult Instance

Use the new `getSObjectType()` method to get the `SObjectType` of a `Schema.DescribeFieldResult` object. The returned type is that of the source sObject describe object that was originally retrieved, eliminating the need for additional mechanisms to determine parent relationships.

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

How: This example uses the `getSObjectType()` method to create a Salesforce object of the same type as the passed in field's originating object and then dynamically populates the field's value.

```
public class ObjectCreator {

    public static sObject createAndSet(Schema.sObjectField field, object fieldValue) {
        Schema.DescribeFieldResult fieldDescribe = field.getDescribe();
        Schema.sObjectType sourceType = fieldDescribe.getSObjectType();
        sObject newObj = sourceType.newSObject(null, true);
        newObj.put(field, fieldValue);
        return newObj;
    }
}
```

Here's how to call the sample `createAndSet()` method.

```
sObject o = ObjectCreator.createAndSet(Account.Industry, 'Development');
Assert.isInstanceOfType(o, Account.class);
Assert.areEqual('Development', ((Account)o).Industry);
```

SEE ALSO:

[Apex Reference Guide: DescribeFieldResult Class \(can be outdated or unavailable during release preview\)](#)

[IdeaExchange: Add getObjectType\(\) Method to DescribeFieldResult Class](#)

Run the SandboxPostCopy Script as Automated Process User

Test the `SandboxPostCopy` script with the same user access permissions as used by post-copy tasks during sandbox creation. Using the same permissions enables the test to better simulate the actual usage of the class and to uncover potential issues.

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

How: Run the `Test.testSandboxPostCopyScript(script, organizationId, sandboxId, sandboxName, RunAsAutoProcUser)` method as Automated Process User by setting the `RunAsAutoProcUser` parameter to `true`.

Enforce RFC 7230 Validation for Apex RestResponse Headers (Release Update)

When this update is enabled, regardless of API version, REST response headers defined in Apex via the `RestResponse.addHeader(name, value)` method have the header names validated based on RFC 7230. The update is available starting in Spring '23.

Where: This change applies to Salesforce orgs in all editions.

When: Salesforce enforces this update in Spring '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: This update improves legacy behavior where Apex REST Response headers weren't validated and enables [RFC 7230](#) validation. After the update, invalid characters such as `/` are no longer accepted.



Note: You must enable this release update in order to migrate your org to Hyperforce.

How: Apex that invokes the `RestResource.addHeader(name, value)` method with a header name that isn't RFC 7230 compliant results in a runtime exception of type `InvalidHeaderException`. Before activating this update in production, check with your package providers to make sure that all your installed packages are compatible. Evaluate the impact to your Salesforce org with these checks.

- Run Apex test cases and check for failures caused by `InvalidHeaderExceptions`.
- Invoke your Apex REST API classes and check responses for `InvalidHeaderException` exceptions.
- Inspect Apex code that calls the `RestResource.addHeader(name, value)` method for a `name` parameter with a value that isn't RFC 7230 compliant.

Restrict Anonymous Apex Access to Core Users

By using the `RestrictCommunityExecAnon` preference, admins can restrict anonymous Apex execution from usage by external users. The feature is enabled by default in new orgs but disabled in existing orgs to avoid disrupting customer usage. When enabled, sites, portal, and community users can't execute anonymous Apex regardless of any other user permissions that are set.

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 *Apex Settings*, and then select **Restrict non-core users from executing anonymous Apex**. To enable this feature programmatically with Metadata API, see [ApexSettings](#) in the *Metadata API Developer Guide*.

Discover Enhanced Debug Logs in Nested Execution Contexts

The end of each code block execution is now correctly logged in nested executions. Previously, debug logs were sometimes not updated with `CODE_UNIT_FINISHED` entries.

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

Static Variables Are Reset Within a Transaction Between Groups of Platform Event–Triggered Flow Interviews

To better protect your data and users, Salesforce changed the behavior of Apex static variables that are set by Apex code invoked by platform event–triggered flows and processes. Now Salesforce resets the values of those static variables within a single transaction between the execution of groups of flow interviews that run for different users. If the flow- or process-invoked Apex code sets any static variables, make sure you don't depend on those static variable values to persist across the entire transaction when the transaction includes multiple users' flow interviews. For example, don't use those static variables to store a complete count of something across the transaction.

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

When: This update takes effect in Spring '23 after January 5, 2023.

SEE ALSO:

[Apex Static Variables Are Reset Within a Transaction Between Groups of Platform Event–Triggered Flow Interviews](#)

Suppress Non-Global Properties with toString()

The default `toString()` implementation of Apex objects only includes member variables that are visible in the current namespace. Non-global properties are suppressed from output when customers invoke `toString()`, either implicitly or explicitly, on managed Apex types. To keep the non-global state of the object visible in debug output, you can explicitly override the `toString()` method. This `toString()` implementation is a versioned behavior change in API v57.0 and later versions.

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

API

API version 57.0 features changes to names for global value set. And versions 21.0 through 30.0 of the Salesforce Platform API are being retired in Summer '23.

IN THIS SECTION:

[Assign the New Salesforce Integration User License to Grant API Only Access](#)

Dedicating a different user to each integration restricts those users to a unique subset of data, giving you more control over operations and better traceability of transactions made at every integration point. With this user license, orgs with many integrations can more easily follow the best practice of having one user per integration. The Salesforce Integration user license grants a user access to Salesforce data and features only through an API.

Choose Any Name for a Global Value Set

When you create a custom global value set in API version 57.0 or later, the developer name is appended with the suffix `__gvs`. You can now create a global value set with any name, and it doesn't conflict with a standard entity of the same name.

Salesforce Platform API Versions 21.0 through 30.0 Retirement (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.

Benefit from More Successful Metadata API Deployments

We improved concurrency-control logic to better handle multiple Metadata API deployments so that fewer successively queued deployments fail. Now, if two deployments are queued at the same time with different computed costs, Salesforce continues to execute the second deployment for a reasonable amount of time after the first deployment finishes. As a result, the second deployment fails less frequently than before.

Assign the New Salesforce Integration User License to Grant API Only Access

Dedicating a different user to each integration restricts those users to a unique subset of data, giving you more control over operations and better traceability of transactions made at every integration point. With this user license, orgs with many integrations can more easily follow the best practice of having one user per integration. The Salesforce Integration user license grants a user access to Salesforce data and features only through an API.

Where: One or more Salesforce Integration user licenses are available by default in Enterprise, Unlimited, Performance, and Developer Editions. More add-on licenses are available to purchase for these editions.

When: This license was announced during the Salesforce Developer Conference, TrailblazerDX, March 7-8, 2023, and it's available after March 14, 2023.

How: Assign the Salesforce Integration user license to new or existing users that are dedicated to an integration. Assign the Salesforce API Only System Integrations profile to ensure the API is enabled and the user is limited to interact with Salesforce via the API. Use the Salesforce Integration API permission set license to extend and restrict specific user and object permissions. This user license is designed for system-to-system integrations. It may not be used for human users to access Salesforce data or features through any user interface. For more information about the user license and what permissions are available when assigned, see [Salesforce Help: Give Integration Users API Only Access](#).

Choose Any Name for a Global Value Set

When you create a custom global value set in API version 57.0 or later, the developer name is appended with the suffix `__gvs`. You can now create a global value set with any name, and it doesn't conflict with a standard entity of the same name.

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

How: This change is transparent except when you:

- Use a Metadata API CRUD-based call on the GlobalValueSet metadata type. When you make any CRUD-based call, such as `createMetadata()`, you must append the suffix `__gvs` to the `fullName` field.

- Use a CRUD-based call on the GlobalValueSet Tooling API type. When you make any CRUD-based call using SOAP API or REST API, you must append the suffix `__gvs` to the FullName field.

SEE ALSO:

[Metadata API Developer Guide: GlobalValueSet](#)

[Metadata API Developer Guide: CRUD-Based Calls](#)

[Tooling API Developer Guide: GlobalValueSet](#)

Salesforce Platform API Versions 21.0 through 30.0 Retirement (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

v21.0, v22.0, v23.0, v24.0, v25.0, v26.0, v27.0, v28.0, v29.0, v30.0



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](#).

Benefit from More Successful Metadata API Deployments

We improved concurrency-control logic to better handle multiple Metadata API deployments so that fewer successively queued deployments fail. Now, if two deployments are queued at the same time with different computed costs, Salesforce continues to execute the second deployment for a reasonable amount of time after the first deployment finishes. As a result, the second deployment fails less frequently than before.

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

Why: Salesforce computes a cost for each deployment based on factors such as the component count and the number of Apex tests to run. In deployments that are queued at the same time or submitted together, the one with the higher cost deploys first. Previously, if two deployments with different computed costs were queued at the same time, the second deployment usually failed if the first deployment took time to complete. One of these error messages displayed.

- UNKNOWN_EXCEPTION: admin operation already in progress
- LIMIT_EXCEEDED error

Einstein Vision

Save time and work more efficiently using Einstein Optical Character Recognition (OCR). Quickly extract handwritten text from a document, and map the text to a relevant document layout and associated fields.

IN THIS SECTION:

[Quickly Extract and Map Handwritten Text to a Structured Document Using Einstein OCR](#)

Digitize all your scanned documents using AI. Einstein Optical Character Recognition (OCR) now recognizes handwritten text from images and PDFs. Using OCR, words in a scanned document, PDF, or image are accurately transcribed regardless if the text is typed, handwritten, or both. Salesforce document AI technologies then organize and map the text to a relevant document layout and its associated fields.

Quickly Extract and Map Handwritten Text to a Structured Document Using Einstein OCR

Digitize all your scanned documents using AI. Einstein Optical Character Recognition (OCR) now recognizes handwritten text from images and PDFs. Using OCR, words in a scanned document, PDF, or image are accurately transcribed regardless if the text is typed, handwritten, or both. Salesforce document AI technologies then organize and map the text to a relevant document layout and its associated fields.

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

How: To detect text in an image or PDF, pass the file the same way that you do for an image file. Use either the sampleLocation parameter that contains the URL to the PDF file or the sampleContent parameter that contains the binary content of the file uploaded as multipart/form-data. Here are two example calls to the OCR endpoint.

Extract text from a local image file.

```
curl -X POST -H "Authorization: Bearer <token>" https://api.einstein.ai/v2/vision/ocr -F modelId="tabulatev2" -F task=text -F sampleContent="@/path/to/82092117.png"
```

Extract text from an online pdf URL.

```
curl -X POST -H "Authorization: Bearer <token>" https://api.einstein.ai/v2/vision/ocr -F
modelId="tabulatev2" -F task=text -F
sampleLocation="https://www.cloudkicks.com/annual_report.pdf"
```

Packaging

Packaging facilitates the development and distribution of business apps. Use second-generation managed packages to create apps to sell and distribute on AppExchange. Use unlocked packages to develop internal business apps.

IN THIS SECTION:

[Specify a Default Language for Unlocked and Second-Generation Managed Packages](#)

When you create a new package version, you can set a default language for the package. Setting a default language lets subscribers customize component labels in Translation Workbench, even if you don't include translations in the package. If you create a package without specifying a language, the language defaults to the user language of the Dev Hub user who created the package. This functionality previously existed only in first-generation managed packages.

[Limit User Profile Access for Packages Installed via Metadata API](#)

When you use Metadata API to install a managed package, you can specify which user profiles in the org can access the package. Use the new `securityType` field on the [InstalledPackage](#) metadata type, and select either all users or admins only. If a security type isn't specified, the default behavior provides access to the package to all user profiles in the org.

[Get Your Packages Ready for Enhanced Domains](#)

To prevent disruption for your customers when enhanced domains are deployed in Spring '23, update your packages. Search for hard-coded URLs for the domains that Salesforce hosts, such as content files and Visualforce pages. Then update the 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.

Specify a Default Language for Unlocked and Second-Generation Managed Packages

When you create a new package version, you can set a default language for the package. Setting a default language lets subscribers customize component labels in Translation Workbench, even if you don't include translations in the package. If you create a package without specifying a language, the language defaults to the user language of the Dev Hub user who created the package. This functionality previously existed only in first-generation managed packages.

Where: This change applies to unlocked and second-generation managed packages.

How: Use the `--language` parameter when you create a new package version, and include the language code listed in [Supported Languages](#) in *Salesforce Help*.

```
sfdx force:package:version:create -p "Your Package Alias" --language es
```

Limit User Profile Access for Packages Installed via Metadata API

When you use Metadata API to install a managed package, you can specify which user profiles in the org can access the package. Use the new `securityType` field on the [InstalledPackage](#) metadata type, and select either all users or admins only. If a security type isn't specified, the default behavior provides access to the package to all user profiles in the org.

Where: This change applies to first-generation managed packages.

Get Your Packages Ready for Enhanced Domains

To prevent disruption for your customers when enhanced domains are deployed in Spring '23, update your packages. Search for hard-coded URLs for the domains that Salesforce hosts, such as content files and Visualforce pages. Then update the 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 packages and to first- and second-generation managed packages. Enhanced 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 \(can be outdated or unavailable during release preview\)](#)

[ISVforce Guide: Call Salesforce URLs Within a Package \(can be outdated or unavailable during release preview\)](#)

[Deploy Enhanced Domains \(Release Update\)](#)

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.
- Government Cloud Plus. Turning on DevOps Center in Government Cloud Plus orgs can send data outside the authorization boundary. Contact your Salesforce account executive for more details.

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.

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.
- Government Cloud Plus. Turning on DevOps Center in Government Cloud Plus orgs can send data outside the authorization boundary. Contact your Salesforce account executive for more details.

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](#)

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:

[Quickly Clone Partial and Full Sandboxes \(Generally Available\)](#)

For Partial and Full sandboxes hosted on Hyperforce, the Quick Clone technology enhances the speed at which they're replicated. Teams can focus more time on building and testing solutions, and less time waiting for sandboxes to be cloned.

[Receive Fewer Emails for Impending Sandbox Deletions](#)

Spam is once again just your favorite canned meat product. We've reduced the number of inactive sandbox emails you'll receive by consolidating notifications. Users in the source (production) org with the Manage Sandbox permission will receive only one email per month that lists all inactive sandboxes per source (production) org.

Quickly Clone Partial and Full Sandboxes (Generally Available)

For Partial and Full sandboxes hosted on Hyperforce, the Quick Clone technology enhances the speed at which they're replicated. Teams can focus more time on building and testing solutions, and less time waiting for sandboxes to be cloned.

Where: This change applies to Partial and Full sandboxes hosted on Hyperforce.

When: This feature will be rolled out as a staggered release after February 11, 2023.

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 sandboxes hosted on Hyperforce.

SEE ALSO:

[Salesforce Help: Clone a Sandbox](#)

Receive Fewer Emails for Impending Sandbox Deletions

Spam is once again just your favorite canned meat product. We've reduced the number of inactive sandbox emails you'll receive by consolidating notifications. Users in the source (production) org with the Manage Sandbox permission will receive only one email per month that lists all inactive sandboxes per source (production) org.

Where: This change applies to sandboxes of Professional, Enterprise, Performance, Unlimited, and Database.com editions.

When: This feature will be rolled out as a staggered release after February 11, 2023.

Who: All users in the source (production) org with the Manage Sandbox user permission.

Why: We don't want you to accidentally lose access to your sandbox. So Salesforce notifies sandbox users of impending deletion of sandboxes that haven't been logged into for at least 90 days. According to our sandbox policy, sandboxes that haven't been accessed for 180 days are deleted.

SEE ALSO:

[Salesforce Help: Inactive Sandbox Expiration](#)

Platform Development Tools

Build applications collaboratively and deliver continuously with Salesforce Developer Experience (DX), the open and integrated experience that makes development on the Customer 360 Platform easy.

IN THIS SECTION:

[Develop Platform Apps with Ease](#)

The Salesforce DX toolset includes Salesforce Extensions for Visual Studio Code and Salesforce CLI. Pick the tool that works best for your team and meets your business needs. We release new versions of both tools weekly.

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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](#)

Monitor and Analyze System Performance with Scale Center (Beta)

Scale Center provides self-serve and near real-time access to your Salesforce performance metrics, helping you build and scale apps with confidence. With Scale Center, you can monitor production health and performance metrics, identify scale hotspots and view detailed diagnostics during performance testing, resulting in high-performing apps on the Salesforce platform.

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



Note: This feature is a Beta Service. Users may opt to use Beta Service and are subject to the applicable terms provided at [Agreements and Terms](#).

Why: With Scale Center, you can identify issues with performance or scale, launch analyses to troubleshoot errors, and retrieve customized insights and recommendations to improve the scalability of your Salesforce implementation.

How: You can enable Scale Center in sandboxes and in production on first party infrastructure (1P) and Hyperforce. From Setup, in the Quick Find box, enter *Scale Center*, and then select **Scale Center**. To join the Scale Center beta release, contact your Program Architect and Account Executive.

SEE ALSO:

[Knowledge Article:: Performance tests FAQ](#)

[Trailblazer Community Group: Salesforce Scalability](#)

Salesforce Functions

Salesforce Functions extends the power of Salesforce with elastic compute and language flexibility.

IN THIS SECTION:

[Salesforce Functions Updates](#)

With Salesforce Functions, 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, 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

The AppExchange Partner Console, which is now generally available, provides new ways for you to deliver success to your customers. The Console is home to the suite of tools you use to manage your AppExchange business. Create solution and consultant listings, and get them approved, in the Listing Builder. More quickly navigate security reviews in a new, intuitive wizard. Explore your listing's usage data with Marketplace Analytics in the Partner Console. Use new AppExchange App Analytics features to analyze CRM Analytics recipe usage, explore query usage with operation fields, retrieve clean read counts with package usage summaries, and discover additional CRUD activity.

IN THIS SECTION:

[Manage Your AppExchange Business in the Partner Console](#)

Use the App Exchange Partner Console to create and publish listings, submit and track security reviews, monitor listing performance with Marketplace Analytics, and more. Previously, you completed such tasks in the Partner Community's publishing tool.

[Experience an Intuitive AppExchange Publishing Journey in the Listing Builder](#)

The new AppExchange Listing Builder provides an easy, intuitive, publishing experience for your solution or consulting service. Guided prompts and step-by-step instructions simplify how you publish listings. You receive alerts and validations at each step so that you can act immediately to get your solutions and services into the hands of the right customers faster.

[Complete the AppExchange Security Review Faster](#)

Use the new security review wizard to submit and manage AppExchange security reviews for your managed package, Salesforce Platform API, or Marketing Cloud API solution. Initiate and complete security reviews before or after you link the solution to an AppExchange listing. Communicate with the security review team in the wizard instead of logging cases.

[Get to Market Faster with a Streamlined Listing Approval Process](#)

Before you publish your AppExchange listing, Salesforce checks that it complies with our partner brand guidelines and program policies. You can now prepare your listing, submit it for approval, and interact with our business teams in the AppExchange Listing Builder.

[Monitor Your AppExchange Listing Performance from the Partner Console](#)

Discover how customers find and interact with your solution or consulting service listing using AppExchange Marketplace Analytics, now available in the Partner Console. Previously, you accessed AppExchange Marketplace Analytics from the Publishing Console, which is retired.

[Analyze CRM Analytics Recipe Usage with AppExchange App Analytics](#)

Discover how your subscribers are running CRM Analytics recipes in your managed packages with App Analytics. Filter your package log file data on `custom_entity_type` by `AnalyticsRecipe`, and on `log_record_type` by `AnalyticsAssetRun`.

[Explore Query Usage with AppExchange App Analytics Package Usage Log Operation Fields](#)

Previously on package usage logs, when the `operation_type` field was `READ`, an `operation_count` equal to 1 represented a read on a record, a SOSL query, or a SOQL query. Now you can retrieve distinct counts for reads or queries with new `operation_type` values. Filter on `operation_type` by `READ`, `SOSL_QUERY`, or `SOQL_QUERY`, and view the corresponding `operation_count` for each `custom_entity`.

[Retrieve Clean Read Counts with AppExchange App Analytics Package Usage Summaries](#)

Previously, `num_reads` on package usage summaries included a count of records that were read and SOSL and SOQL queries performed. Now `num_reads` includes only a count of records that were read. SOSL and SOQL queries are no longer included.

[Discover Additional CRUD Activity with AppExchange App Analytics UnassociatedCRUD log_record_type](#)

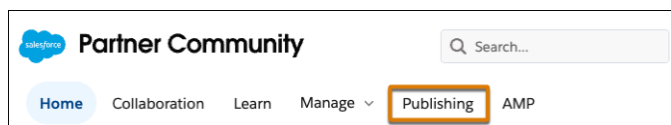
App Analytics package usage logs include create, read, update, and delete (CRUD) data from specific log records. Now, use the `log_record_type` field `UnassociatedCRUD` value to retrieve CRUD data from custom objects that aren't associated with a log record type that App Analytics captures or that are associated with unknown log records.

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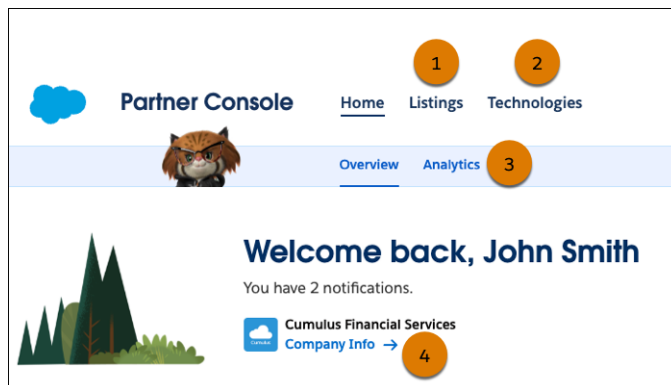
Who: To use the Partner Console, you must have the Manage Listings permission in the Salesforce Partner Community.

How: From the Salesforce Partner Community, to launch the Partner Console, click **Publishing**.



The Partner Console bundles many of the features that were in the Salesforce Partner Community into a faster, more intuitive experience.

- Create, remove, and edit your AppExchange listings in the Listings (1) area.
- Connect Salesforce orgs, such as those that contain your managed packages, in the Technologies (2) area.
- Submit managed packages and API solutions for security review and track progress in the Solutions area under Technologies.
- Monitor your listing's performance with Marketplace Analytics (3).
- Share key brand details and company information, including your logo, description, and points of contact, in the Company Info (4) area.



SEE ALSO:

[ISVforce Guide: Publish on AppExchange](#)

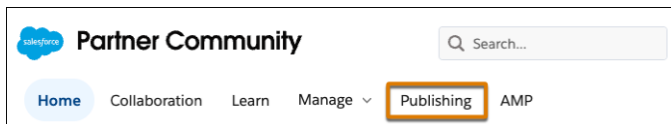
Experience an Intuitive AppExchange Publishing Journey in the Listing Builder

The new AppExchange Listing Builder provides an easy, intuitive, publishing experience for your solution or consulting service. Guided prompts and step-by-step instructions simplify how you publish listings. You receive alerts and validations at each step so that you can act immediately to get your solutions and services into the hands of the right customers faster.

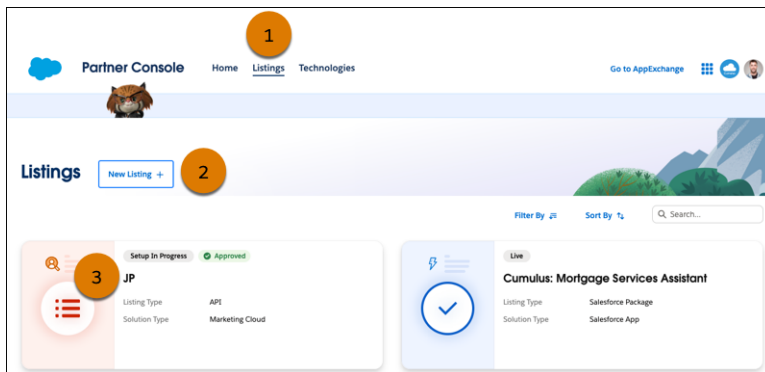
Where: The Listing Builder is a feature of the Partner Console.

Who: To use this feature, you must have the Manage Listings permission in the Salesforce Partner Community.

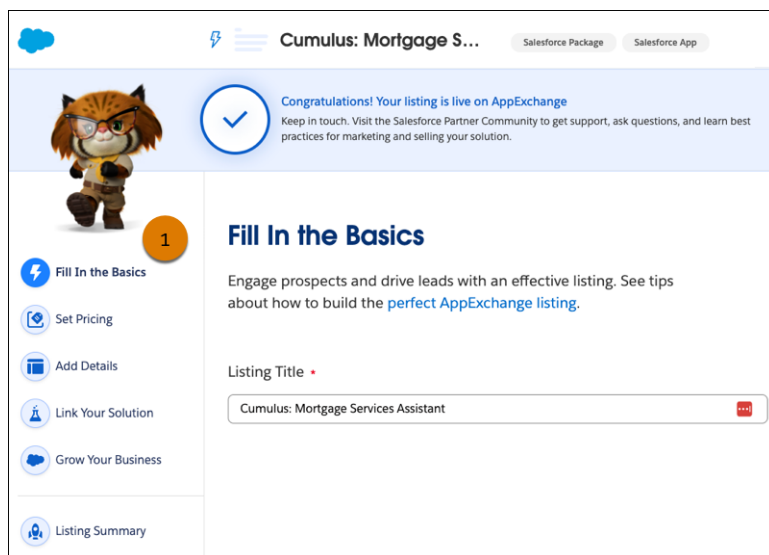
How: From the Salesforce Partner Community, to launch the Partner Console, click **Publishing**.



In the Partner Console, navigate to the Listings tab (1) to view your in-progress and published listings. To create a listing, click **New Listing** (1). To edit a listing, click the listing's title (2). Either click launches the Listing Builder.



Explore the Listing Builder using the left navigation menu (1).



SEE ALSO:

[ISVforce Guide: Publish on AppExchange](#)

Complete the AppExchange Security Review Faster

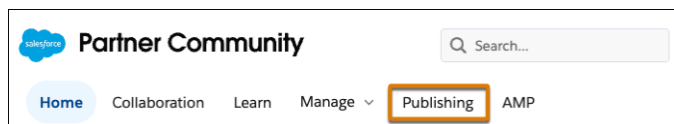
Use the new security review wizard to submit and manage AppExchange security reviews for your managed package, Salesforce Platform API, or Marketing Cloud API solution. Initiate and complete security reviews before or after you link the solution to an AppExchange listing. Communicate with the security review team in the wizard instead of logging cases.

Where: The security review wizard is a feature of the Partner Console.

Who: To use this feature, you must have the Manage Listings permission in the Salesforce Partner Community.

How: To access the security review wizard, first log in to the Salesforce Partner Community. Then, click **Publishing** to launch the Partner Console.

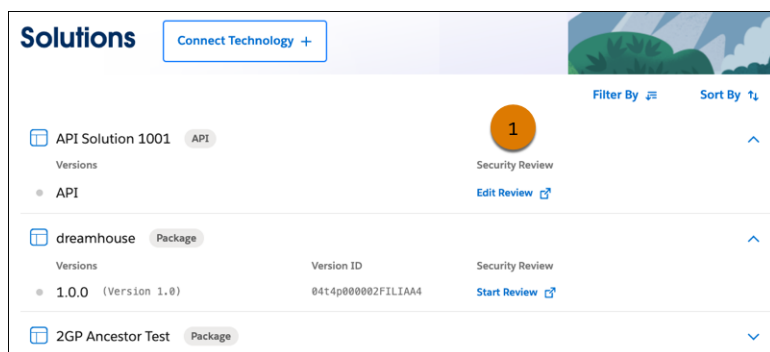
From the Salesforce Partner Community, to launch the Partner Console, click **Publishing**.



Go to Technologies then Solutions to find:

- Packages that exist on any of the Salesforce orgs the are connected to the Partner Console.
- API solutions that were added to the Console.

Locate the package or API that you submitted or plan to submit for security review. Check the Security Review column (1) to see the available actions for your solution. To launch the security review wizard for a new review, select **Start Review**. For a submitted review, select **Edit Review**.



SEE ALSO:

[ISVforce Guide: Publish on AppExchange](#)

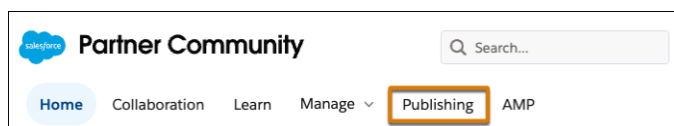
Get to Market Faster with a Streamlined Listing Approval Process

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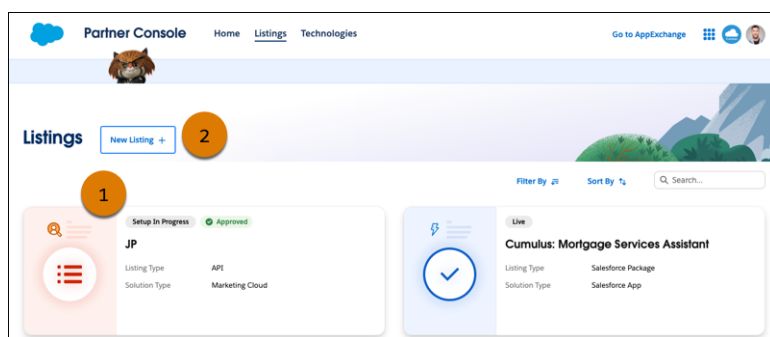
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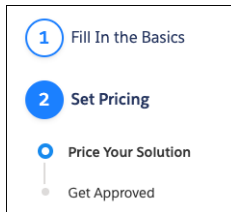
How: From the Salesforce Partner Community, to launch the Partner Console, click **Publishing**.



In the Partner Console, go to the Listings page to see your in-progress and published listings. To launch the Listing Builder, either click **New Listing** (1), or find an existing listing and click its title (2).



Prepare your listing and submit it for approval using the Fill In the Basics and Price Your Solution sections of the Listing Builder.



After you complete all required fields in Fill In the Basics and Price Your Solution, submit your listing for approval. While we're processing your approval, you can continue to build your listing. With this new process, our business teams can message you in the Listing Builder. To view their messages, visit the Get Approved page.

SEE ALSO:

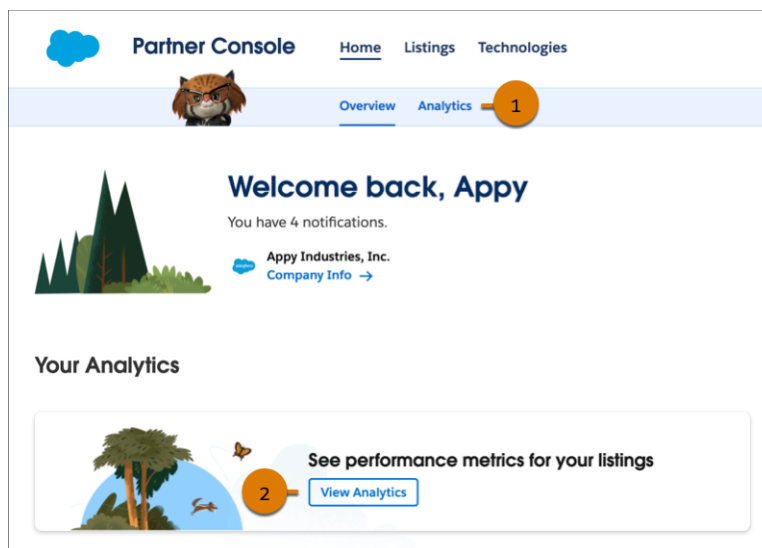
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Monitor Your AppExchange Listing Performance from the Partner Console

Discover how customers find and interact with your solution or consulting service listing using AppExchange Marketplace Analytics, now available in the Partner Console. Previously, you accessed AppExchange Marketplace Analytics from the Publishing Console, which is retired.

Where: This feature is available in the Partner Console in the Salesforce Partner Community.

How: To open the Partner Console, log in to the Salesforce Partner Community, and then click **Publishing**.



To view performance metrics for a listing, click **Analytics** (1) or **View Analytics** (2).


SEE ALSO:

[ISVforce Guide: Publish on AppExchange](#)

Analyze CRM Analytics Recipe Usage with AppExchange App Analytics

Discover how your subscribers are running CRM Analytics recipes in your managed packages with App Analytics. Filter your package log file data on `custom_entity_type` by `AnalyticsRecipe`, and on `log_record_type` by `AnalyticsAssetRun`.


Where: This change applies to Lightning Experience and Salesforce Classic in Developer Edition. AppExchange App Analytics is available only for managed packages that have passed security review.

How: Log in to the [Salesforce Partner Community](#). Click  and then click **Log a Case for Help**. For inquiry type, select **Partner Program Support**. For product, enter and select **Partner Programs & Benefits**. For topic, enter and select **ISV Technology Request**. Provide any other required details, such as the package ID that you want to track analytics data for, and then click **Create Case**.

Explore Query Usage with AppExchange App Analytics Package Usage Log Operation Fields

Previously on package usage logs, when the `operation_type` field was `READ`, an `operation_count` equal to 1 represented a read on a record, a SOSL query, or a SOQL query. Now you can retrieve distinct counts for reads or queries with new `operation_type` values. Filter on `operation_type` by `READ`, `SOSL_QUERY`, or `SOQL_QUERY`, and view the corresponding `operation_count` for each `custom_entity`.


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Previously, `num_reads` on package usage summaries included a count of records that were read and SOSL and SOQL queries performed. Now `num_reads` includes only a count of records that were read. SOSL and SOQL queries are no longer included.

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Discover Additional CRUD Activity with AppExchange App Analytics

UnassociatedCRUD log_record_type

App Analytics package usage logs include create, read, update, and delete (CRUD) data from specific log records. Now, use the `log_record_type` field `UnassociatedCRUD` value to retrieve CRUD data from custom objects that aren't associated with a log record type that App Analytics captures or that are associated with unknown log records.

Where: This change applies to Lightning Experience and Salesforce Classic in Developer Edition. AppExchange App Analytics is available only for managed packages that passed security review.

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Change Data Capture

Receive change events for more objects.

IN THIS SECTION:

[Receive Change Event Notifications for More Objects](#)

With Change Data Capture, you can now receive notifications of record changes for the FlowRecordVersion, Order, OrderItem, Product2, Pricebook Entry, RecordSetFilterCriteria, PurchaserPlan, and ProductMedia objects.

Receive Change Event Notifications for More Objects

With Change Data Capture, you can now receive notifications of record changes for the FlowRecordVersion, Order, OrderItem, Product2, Pricebook Entry, RecordSetFilterCriteria, PurchaserPlan, and ProductMedia objects.

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

How: Change Data Capture is available for all custom objects defined in your Salesforce org and a subset of standard objects. Select the objects that you want to get notifications for on the Change Data Capture page in Setup or create a custom channel.

Platform Events

Publish standard events without using allocations.

IN THIS SECTION:

[Publish Standard Events Without Using Allocations](#)

Publish standard events without worrying about reaching the hourly event publishing allocation. Typically, Salesforce publishes standard events and not users, but users can publish a small subset of standard events that support the `create()` call. Salesforce-published standard events continue to be exempt from the publishing allocation.

Publish Standard Events Without Using Allocations

Publish standard events without worrying about reaching the hourly event publishing allocation. Typically, Salesforce publishes standard events and not users, but users can publish a small subset of standard events that support the `create()` call. Salesforce-published standard events continue to be exempt from the publishing allocation.

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

How: The affected standard events include:

- [FlowOrchestrationEvent](#)
- [ProcessExceptionEvent](#)

The event publishing allocation still applies to custom platform events.

SEE ALSO:

[Platform Events Developer Guide: Platform Event Allocations](#)

[Platform Events Developer Guide: Publishing Platform Events](#)

[Platform Events Developer Guide: Standard Platform Event Object List](#)

Event Bus

Check out Pub/Sub API enhancements for publishing and subscribing to events.

IN THIS SECTION:

[Benefit from Pub/Sub API Enhancements](#)

Enhancements to Pub/Sub API include a new port, a new endpoint for Germany, a new service protection limit, and an event correlation key.

Benefit from Pub/Sub API Enhancements

Enhancements to Pub/Sub API include a new port, 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 February 1, 2023) Port 443 support—You can now connect to the Pub/Sub API endpoint using port 443, which is a standard HTTPS port. Previously, only port 7443 was supported. Port 443 is available for all Pub/Sub API endpoints.
 - Global endpoint: `api.pubsub.salesforce.com:443`
 - Europe (Frankfurt) endpoint: `api.deu.pubsub.salesforce.com:443`
- (As of January 25, 2023) Channel membership and user permission changes—While a subscription is active, if a channel member is added or removed, you start receiving events reflecting the new membership within 10 minutes. Similarly, user permission changes to platform events and entities corresponding to change events take effect within 10 minutes. Previously, channel membership and user permission changes required a subscription restart.
- (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.

[API: New and Changed Items](#)

Access more data objects and metadata types in API version 57.0.

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.

New Components

This component is new and requires API version 57.0 and later.

lightning-barcode-scanner

This component embeds an icon that launches a barcode scanner when the user clicks it. You can configure this component to only scan certain barcode types, change the size of the camera view, customize the icon, and more.

Changed Lightning Web Components

These components have changed.

lightning-input

This attribute is new.

- `aria-invalid`—Control whether accessibility tools read empty required textboxes as invalid. Default value is `false`.

lightning-input-field

This attribute is new.

- `aria-invalid`—Control whether accessibility tools read empty required textboxes as invalid. Default value is `false`.

lightning-spinner

The `size` attribute has these new options.

- `x-small`

- `xx-small`

SEE ALSO:

[Component Library](#)

[Salesforce Lightning Design System: Icons](#)

New and Changed Modules for Lightning Web Components

Do more with Lightning web components by using modules.

Changed Modules

These modules have new or deprecated wire adapters or JavaScript functions.

lightning/uiRecordApi

This module includes a new function.

- `notifyRecordUpdateAvailable(recordIds)` —Call this function to notify Lightning Data Service that a record has changed outside its mechanisms, such as via imperative Apex or by calling User Interface API via a third-party framework. `notifyRecordUpdateAvailable(recordIds)` considers the record data wired by all instantiated components. For every wire that uses record data from one of the supplied `recordIds`, Lightning Data Service obtains fresh data for the wire and re-emits updated values only to the wire if the data has changed. This function supersedes `getRecordNotifyChange(recordIds)`.

This module includes a deprecated function. The deprecated function continues to be available, and support cases will be reviewed on a case by case basis.

- `getRecordNotifyChange(recordIds)` (Deprecated)—We recommend using `notifyRecordUpdateAvailable(recordIds)` instead.

For more information, see [Lightning Web Components Dev Guide: notifyRecordUpdateAvailable\(recordIds\)](#) (can be outdated or unavailable during release preview).

This module includes deprecated wire adapters and functions. The deprecated wire adapters and functions continue to be available, and support cases will be reviewed on a case by case basis.

- `getRecordUi` (Deprecated)—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 specific or optional fields by 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)—We recommend constructing the record object in your code with the `apiName` and `fields` properties instead.
- `refresh` (Deprecated)—We recommend using `refreshApex` or `notifyRecordUpdateAvailable` instead.

lightning/uiRelatedListApi

These parameters from the [User Interface API](#) were added to the `getRelatedListInfo` wire adapter.

- `fields`
- `optionalFields`
- `restrictColumnsToLayout`

For more information, see [Lightning Web Components Dev Guide: lightning/uiRelatedListApi](#) (can be outdated or unavailable during release preview).

SEE ALSO:

[Component Library](#)

New and Changed Aura Components

Build UI easily with these new and changed components.

New Aura Components

These components are new and require API version 57.0 and later.

lightning:availableForForecastingPage

Use this interface to make custom components available only to Lightning forecasts pages.

lightning:forecastingTemplate

Use this interface to use a component as a custom template for Lightning forecasts pages built in Lightning App Builder. Components using the `lightning:forecastingTemplate` interface can't use additional interfaces, such as `flexipage:availableForAllPageTypes` or `force:hasRecordId`.

Changed Aura Components

These components have changed.

lightning:input

This attribute is new.

- `aria-invalid`—Control whether accessibility tools read empty required textboxes as invalid. Default value is `false`.

lightning:inputField

This attribute is new.

- `aria-invalid`—Control whether accessibility tools read empty required textboxes as invalid. Default value is `false`.

lightning:spinner

The `size` attribute has these new options.

- `x-small`
- `xx-small`

SEE ALSO:

[Component Library](#)

[Salesforce Lightning Design System: Icons](#)

[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 new or changed classes, methods, interfaces, enums, or exceptions.

[RichMessaging Namespace](#)

The RichMessaging namespace has these new classes and interfaces.

[Schema Namespace](#)

The Schema namespace has these new or changed classes, methods, interfaces, enums, or exceptions.

[System Namespace](#)

The System namespace has these new or changed classes, methods, interfaces, enums, or exceptions.

SEE ALSO:

[Apex: New Features](#)

Auth Namespace

The Auth namespace has these new or changed classes, methods, interfaces, enums, or exceptions.

New or Changed Methods in Existing Classes

Check if the Headless Forgot Password flow is enabled

Use the new `getHeadlessForgotPasswordEnabled()` method in the `Auth.AuthConfiguration` class.

RichMessaging Namespace

The RichMessaging namespace has these new classes and interfaces.

New Classes

Handle authorization request response data for rich content messaging.

Use the new `AuthRequestResponse` class and its methods: `getAccessToken`, `getAuthProviderName`, and `getContextRecordId`.

Handle authorization request results for rich content messaging.

Use the new `AuthRequestResult` class and its properties: `expirationDateTime`, `redirectPageReference`, and `resultStatus`.

Provide parameter payloads in rich content messages.

Use the new `MessageDefinitionInputParameter` class.

Provide time option payloads in rich content messages.

Use the new `TimeSlotOption` class and its properties: `duration` and `startTime`.

New Interfaces

Handle authorization requests for rich content messaging.

Implement the new `AuthRequestHandler` interface.

Schema Namespace

The Schema namespace has these new or changed classes, methods, interfaces, enums, or exceptions.

New or Changed Methods in Existing Classes

Get the Salesforce object type from which a `Schema.DescribeFieldResult` instance originates

Use the new `getObjectType()` method of the `Schema.DescribeFieldResult` class, which returns a `Schema.SObjectType` result.

System Namespace

The System namespace has these new or changed classes, methods, interfaces, enums, or exceptions.

New Classes

Interact with email messages and email threading

Use the new `EmailMessages` class and its methods: `getFormattedThreadingToken` and `getRecordIdFromEmail`.

New or Changed Methods in Existing Classes

Pass bind variables to a dynamic SOQL query with a `Map` parameter so that the variables are no longer required to be in scope when the query is executed

Use the new `queryWithBinds()`, `getQueryLocatorWithBinds()`, and `countQueryWithBinds()` methods of `System.Database` class.

DEPRECATED: Method `recalculateFormulas()` in `System.SObject`

The `recalculateFormulas()` method in the `System.SObject` class isn't supported in API version 57.0 and later. Use the `recalculateFormulas()` method in the `System.Formula` class instead.

Specify a minimum delay (in minutes) before a queueable job is scheduled for execution

Use the `enqueueJob(queueable, delay)` method in the `System.System` class. The delay can be between 0 (zero) and 10 minutes.

Test the `SandboxPostCopy` script with the same user access permissions as used by post-copy tasks during sandbox creation

Run the `Test.testSandboxPostCopyScript(script, organizationId, sandboxId, sandboxName, isRunAsAutoProcUser)` method as Automated Process User by setting the `isRunAsAutoProcUser` parameter to `true`.

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

Create custom experiences in Salesforce using Connect in Apex.

Many Connect REST API resource actions are exposed as static methods on Apex classes in the `ConnectApi` namespace. These methods use other `ConnectApi` classes to input and return information. We refer to the `ConnectApi` namespace as *Connect in Apex*.

IN THIS SECTION:

[New Connect in Apex Classes](#)

These classes are new.

[Changed Connect in Apex Input Classes](#)

These input classes have changes.

[Changed Connect in Apex Output Classes](#)

These output classes have changes.

[Changed Connect in Apex Enums](#)

These enums have changes.

SEE ALSO:

[Connect REST API](#)

[Apex Reference Guide: ConnectApi Namespace](#)

[Connect REST API Developer Guide](#)

New Connect in Apex Classes

These classes are new.

Commerce

These new methods are in the `ConnectApi.CommerceBuyerExperience` class.

Get Commerce account addresses for a webstore and account, excluding countries not supported by the webstore

- `getCommerceAccountAddress(webstoreId, accountId, addressType, excludeUnsupportedCountries)`
- `getCommerceAccountAddress(webstoreId, accountId, defaultOnly, addressType, excludeUnsupportedCountries)`
- `getCommerceAccountAddress(webstoreId, accountId, defaultOnly, addressType, excludeUnsupportedCountries, fields, pageToken, pageSize, sortOrder)`

Add an order to a cart using a webstore order summary

- `addOrderToCart(webstoreId, orderSummaryId, orderToCartInput)`
- `addOrderToCart(webstoreId, orderSummaryId, orderToCartInput, effectiveAccountId)`

These new methods are in the `ConnectApi.CommerceCart` class.

Set or verify the currency code for the cart

- `addItemToCart(webstoreId, effectiveAccountId, activeCartOrId, cartItemInput, currencyIsoCode)`
- `addItemToCart(webstoreId, effectiveAccountId, activeCartOrId, cartItems, currencyIsoCode)`
- `applyCartCoupon(webstoreId, effectiveAccountId, activeCartOrId, cartCouponInput, currencyIsoCode)`
- `deleteCartCoupon(webstoreId, effectiveAccountId, activeCartOrId, cartCouponId, currencyIsoCode)`
- `getCartCoupons(webstoreId, effectiveAccountId, activeCartOrId, currencyIsoCode)`
- `getCartItemPromotion(webstoreId, effectiveAccountId, activeCartOrId, cartItemPromotionCollectionInput, currencyIsoCode)`

- `getCartItems(webstoreId, effectiveAccountId, activeCartOrId, productFields, pageParam, pageSize, sortParam, currencyIsoCode)`
- `getCartPromotions(webstoreId, effectiveAccountId, activeCartOrId, currencyIsoCode)`
- `getOrCreateActiveCartSummary(webstoreId, effectiveAccountId, activeCartOrId, currencyIsoCode)`
- `updateCartItem(webstoreId, effectiveAccountId, activeCartOrId, cartItemId, cartItem, currencyIsoCode)`

Get promotions for a cart item

- `getCartItemPromotion(webstoreId, effectiveAccountId, activeCartOrId, cartItemPromotionCollectionInput)`

Input class: `ConnectApi.CartItemPromotionCollectionInputRepresentation`

Output class: `ConnectApi.CartItemPromotionCollectionOutputRepresentation`

This Apex method and input and output classes were previously available but undocumented.

Get promotions for a cart

- `getCartPromotions(webstoreId, effectiveAccountId, activeCartOrId)`

Output class: `ConnectApi.CartPromotionCollectionOutputRepresentation`

This Apex method and input and output classes were previously available but undocumented.

This new method is in the `ConnectApi.CommerceCatalog` class.


Get a collection of child products related to a parent product

- `getProductChildCollection(webstoreId, productId, effectiveAccountId, fields, mediaGroups, excludeFields, excludeMedia, excludeAttributeSetInfo, excludeQuantityRule, pageToken, pageSize)`

New output class: `ConnectApi.ProductChildCollection`

This new method is in the `ConnectApi.CommercePromotions` class.

Evaluate promotions based on coupons, cart items, and shipping

 **Note:** To enable promotions based on shipping, contact Salesforce Customer Support.

- `evaluate(salesTransaction)`

New input class: `ConnectApi.PromotionEvaluateInput`

New output class: `ConnectApi.PromotionEvaluation`

These new methods are in the `ConnectApi.CommerceSearchSettings` class.

Create an index of a product catalog

- `createCommerceSearchIndex(webstoreId, indexBuildType)`

New input class: `ConnectApi.CommerceSearchIndexBuildType`

Get a log of index builds for a webstore

- `getCommerceSearchIndexLogs(webstoreId)`

New output class: `ConnectApi.CommerceSearchIndexLogCollection`

Data Cloud, Formerly Customer Data Platform

These new methods are in the new `ConnectApi.CdpIdentityResolution` class.

Create an identity resolution ruleset

- `createIdentityResolution(input)`

New input class: `ConnectApi.CdpIdentityResolutionConfigInput`

New output class: `ConnectApi.CdpIdentityResolutionOutput`

Delete an identity resolution ruleset

- `deleteIdentityResolution(identityResolution)`

Get an identity resolution ruleset

- `getIdentityResolution(identityResolution)`

New output class: `ConnectApi.CdpIdentityResolutionOutput`

Get identity resolution rulesets

- `getIdentityResolutions()`

New output class: `ConnectApi.CdpIdentityResolutionsOutput`

Run an identity resolution ruleset job

- `runIdentityResolutionNow(identityResolution, input)`

New input class: `ConnectApi.CdpIdentityResolutionRunNowInput`

New output class: `ConnectApi.CdpIdentityResolutionRunNowOutput`

Update an identity resolution ruleset

- `updateIdentityResolution(identityResolution, input)`

New input class: `ConnectApi.CdpIdentityResolutionConfigPatchInput`

New output class: `ConnectApi.CdpIdentityResolutionOutput`

Publish a segment

- `executePublishAdhoc(segmentId)`

New output class: `ConnectApi.CdpSegmentActionOutput`

Publishing a segment is available in version 56.0 and later, but was previously undocumented.

These new methods are in the new `ConnectApi.CdpCalculatedInsight` class.

Get calculated insights

- `getCalculatedInsights(definitionType, batchSize, offset, orderby, dataspace)`

New output class: `ConnectApi.CdpCalculatedInsightPage`

Create a calculated insight

- `createCalculatedInsight(input)`

New input class: `ConnectApi.CdpCalculatedInsightInput`

New output class: `ConnectApi.CdpCalculatedInsightOutput`

Get a calculated insight

- `getCalculatedInsight(apiName)`

New output class: `ConnectApi.CdpCalculatedInsightOutput`

Update a calculated insight

- `updateCalculatedInsight (apiName, input)`

New input class: `ConnectApi.CdpCalculatedInsightInput`

New output class: `ConnectApi.CdpCalculatedInsightOutput`

Delete a calculated insight

- `deleteCalculatedInsight (apiName)`

Trigger a run for a calculated insight

- `runCalculatedInsight (apiName)`

New output class: `ConnectApi.CdpCalculatedInsightActionRunResponseRepresentation`

Changed Connect in Apex Input Classes

These input classes have changes.

Commerce

ConnectApi.CartInput

This input class has this new property.

- `currencyIsoCode`—Currency ISO code of the cart.

ConnectApi.ChangeItemInputRepresentation

This input class has this new property.

- `changeItemFees`—List of input data for fees associated with the order item being returned or canceled.

ConnectApi.commerceAddressInput

This input class has these new properties.

- `companyName`—The address company name.
- `firstName`—The address first name.
- `lastName`—The address last name.
- `middleName`—The address middle name.
- `phoneNumber`—The address phone number.

ConnectApi.OrderSummaryInputRepresentation

This input class has this new property.

- `sourceProcess`—Specifies whether the OrderSummary is being created by an Order on Behalf Of process (`OrderOnBehalf`) or not (`Standard`).

Data Cloud, Formerly Customer Data Platform

ConnectApi.CdpSegmentInput

This input class has these new properties.

- `dataSpace`—Segment data space.
- `displayName`—Segment display name.
- `segmentOnApiName`—API name of the SegmentOn entity.

Named Credentials

ConnectApi.CredentialInput

This input class has this new property.

- `authenticationProtocolVariant`—Authentication protocol variant of the external credential.

Changed Connect in Apex Output Classes

These output classes have changes.

Commerce

ConnectApi.CartItem

This output class has this new property.

- `currencyIsoCode`—Currency ISO code of the cart.

ConnectApi.ChangeItemOutputRepresentation

This output class has these new properties.

- `totalFeeAmount`—Total amount of the fees charged for the change.
- `totalFeeTaxAmount`—Total amount of tax on the fees charged for the change.

ConnectApi.commerceAddressOutput

This output class has these new properties.

- `companyName`—The address company name.
- `firstName`—The address first name.
- `lastName`—The address last name.
- `middleName`—The address middle name.
- `phoneNumber`—The address phone number.

ConnectApi.CommerceSearchIndex

This output class has these new properties.

- `indexBuildType`—Build type of the index.
- `isIncrementable`—Specifies whether the index allows incremental indexing (`true`) or not (`false`).
- `lastCatalogSnapshotTime`—Catalog snapshot time of the index.

ConnectApi.SubmitCancelOutputRepresentation

This output class has this new property.

- `feeChangeOrderId`—ID of the change order created by canceling order items with associated cancel fees. Use this change order to create an invoice.

ConnectApi.SubmitReturnOutputRepresentation

This output class has this new property.

- `feeChangeOrderId`—ID of the change order created by returning order items with associated return fees. Use this change order to create an invoice.

Data Cloud, Formerly Customer Data Platform

ConnectApi.CdpSegmentOutput

This output class has these new properties.

- `dataSpace`—Segment data space.
- `displayName`—Segment display name.
- `excludeCriteria`—Segment exclude criteria.
- `includeCriteria`—Segment include criteria.
- `nextPublishDateTime`—Date and time of the next segment publish.

Named Credentials

ConnectApi.Credential

This output class has this new property.

- `authenticationProtocolVariant`—Authentication protocol variant of the external credential.

ConnectApi.ExternalCredential

This output class has these new properties.

- `authenticationProtocolVariant`—Authentication protocol variant of the external credential.
- `customHeaders`—List of custom headers.
- `parameters`—List of parameters of the external credential.

Salesforce CMS

ConnectApi.ManagedContentChannel

This output class has this new property.

- `mediaCacheControlMaxAge`—HTTP cache control max age response header for media delivered from the channel.

Changed Connect in Apex Enums

These enums have changes.

For information about these enums, see `ConnectApi` Enums in the *Apex Reference Guide*.

ConnectApi.NavigationMenuItemActionType

This enum has this new value.

- `Modal`—Modal, such as Account Switcher.

ConnectApi.NavigationMenuItemType

This enum has these new values.

- `DataSourceDriven`—Menu items dynamically added from a data source.
- `Modal`—Modal, such as Account Switcher.

ConnectApi.OrchestrationStepType

This enum has this new value.

- `ManagedContentRoleInteractiveStep`

API: New and Changed Items

Access more data objects and metadata types in API version 57.0.

IN THIS SECTION:

[New and Changed Objects](#)

Access more data through these new and changed standard objects.

[New and Changed Standard Platform Events](#)

Receive real-time notifications from Salesforce by subscribing to the channels of these new and changed standard platform events.

[Bulk APIs](#)

Added eight PK chunking-enabled objects for better query performance.

[Connect REST API](#)

Integrate mobile apps, intranet sites, and third-party web applications with Salesforce using Connect REST API.

[CRM Analytics REST API](#)

Use the CRM Analytics REST API to schedule app data refreshes and add interactions to dashboard widgets.

[Einstein Discovery REST API](#)

Use the Einstein Discovery REST API to configure validation for stories.

[Metadata API](#)

Access more metadata through these new and changed metadata types.

[REST API](#)

REST API includes changes to the response for `/limits`, a new HTTP status code, and new and changed invocable actions.

[Async SOQL Retirement](#)

Async SOQL is scheduled for retirement in all Salesforce orgs in Summer '23.

[Tooling API New and Changed Objects](#)

Access more metadata through these new and changed Tooling API objects.

[User Interface API](#)

Prevent duplication of records with idempotent record writes on more UI API resources, perform quick actions, and do more with related lists. The UI API also supports more objects.

[GraphQL API](#)

Filter records by location, use GraphQL API in Lightning Web Components, and more.

New and Changed Objects

Access more data through these new and changed standard objects.

Salesforce Overall

See the field type of a column in a related list

Use the new `DataType` field on the existing `RelatedListColumnDefinition` object.

Get more information about active permission set licenses

Use the new `DeveloperName`, `MasterLabel`, and `TotalLicenses` fields on the existing `ActivePermSetLicenseMetric` object.

Commerce

Indicate the process that created an order summary

Use the new `SourceProcess` field on the existing `OrderSummary` object.

Store more detailed address information for use with the Commerce Address API

Use the new `AddressFirstName`, `AddressLastName`, `AddressMiddleName`, `CompanyName`, and `PhoneNumber` fields on the existing `ContactPointAddress` object.

Create tiered promotions

Use the new `PromotionTier` object, the new `IsTiered` field on the existing `Promotion` object, and the new `PromotionTierId` field on the existing `PromotionQualifier` and `PromotionTarget` objects.

Create a list of products to pick for one or more fulfillment orders at a location and assign it to an associate

Use the new `PickTicket`, `PickTicketAssignment`, `PickTicketProduct`, `PickTicketFeed`, `PickTicketShare`, and `PickTicketProductFeed` objects.

Assign a tax-rounding strategy to a GeoCountry

Use the new `TaxGeoConfig` and `TaxGeoConfigShare` objects.

Associate a state with a GeoCountry

Use the new `GeoState` object.

BEHAVIOR CHANGE: The Name is now createable, updateable, and nillable on the GeoCountry object

You can now create, update, or empty the `Name` field.

BEHAVIOR CHANGE: The ProductCode is now idLookup on the TaxTreatment object

You can now use the `ProductCode` field to specify a `TaxTreatment` record in an upsert call.

Specify that a WebCart is in pending closed status

Use the new supported value `PendingClosed` in the existing `Status` field on the `WebCart` object.

Create SEO-friendly URL slugs for Product and Category pages

Use the new `ObjectRelatedUrl` object (pilot).

Specify the first and last name of a delivery recipient

Use the new `DeliverToFirstName` and `DeliverToLastName` fields on the `CartDeliveryGroup` object.

View the total tax for a cart item before promotions, including quantity-based adjustments

Use the new `TotalPriceTaxAmount` field on the `CartItem` object. Introduced in API version 56.0, this field has been added to the Object Reference for the Salesforce Platform.

Customization**Specify a customer's gender identity**

Use the new `GenderIdentity` field on the `Contact`, `Lead`, and `Person Account` objects.

Specify a customer's pronouns

Use the new `Pronouns` field on the `Contact`, `Lead`, and `Person Account` objects.

Development**Get release status information about a Sandbox**

Use the `IsNonPreview`, `IsPreRelease`, and `IsPreview` fields on the `SandboxInfo` object.

Get user access information about a Sandbox

Use the `ActivationUserGroupId` field on the `SandboxInfo` object.

Event Monitoring

Get more details about SOAP API requests using the `EXCEPTION_MESSAGE` field

Use the `EXCEPTION_MESSAGE` field to see details about an error in handling a SOAP API request or why an API request failed. This new field is available for the SOAP API Event Type.

Get the category of an unexpected Apex exception, such as the specific Apex limit that you exceeded

Use the new `EXCEPTION_CATEGORY` field of the Apex Unexpected Exception event type of the `EventLogFile` object.

Experience Cloud

Set a time, in seconds, for a requested CMS image or document content resource in the CMS channel to expire before a new request for the resource must be made

Use the new `MediaCacheControlMaxAge` field on the `ManagedContentChannel` object.

Indicates whether a redirect rule is dynamic

Use the new `IsDynamic` field on the `SiteRedirectMapping` object.

Configure a user to own more than the allowed limit of customer or partner users.

Create a `PersonAccountOwnerPowerUser` object.

Specify the email template to use with the Headless Forgot Password Flow

Use the new `HeadlessForgotPasswordTemplateId` field on the `Network` object.

Determine if the Headless Forgot Password Flow is enabled

Use the `OptionsHeadlessFrgtPswEnabled` field on the `Network` object.

Field Service

Add asset attributes to help track and analyze asset conditions

Use the new `AssetAttribute`, `AttributeDefinition`, `AttributePicklist`, and `AttributePicklistValue` objects.

Monitor recordset filter criteria thresholds of asset attributes

Use the new `RecordsetFiltrCritMonitor` object.

Payments

Specify the type of payment method used for payment method objects

Use the `PaymentMethodDetails`, `PaymentMethodSubtype`, and `PaymentMethodType` fields to provide information about the type of payment method used for a transaction. The new fields are available for the `AlternativePaymentMethod`, `CardPaymentMethod`, `DigitalWallet`, and `PaymentMethod` objects.

Get information about Salesforce Payments merchant accounts

Use the new `MerchantAccount` object. Introduced in API version 56.0, this object has been added to the *Object Reference for the Salesforce Platform*

Revenue

Define a discount that can be applied to an entire order

Use the new `PriceAdjustmentGroupShape` object.

Define a discount that can be applied to an item in a sales transaction

Use the new `PriceAdjustmentItemShape` object.

Define the relationships between your products. For example, you can define the relationship between a main bundle product and its associated components

Use the new `ProductRelationshipType` object.

Define the amount left to pay by a customer after you decrease the product quantity of a subscription

Use the `ObligatedAmount` field in the existing `SalesTransactionItem` object.

Calculate the price of amended sales transaction items in a pricing transaction

Use the `AmendmentAtLastNegotiatedPrice` and `AmendmentStartingFromListPrice` values from the `PricingTransactionType` field in the existing `SalesTransactionItem` object.

Create the record to use as an item in a sales transaction shape; for example, a quote line item or an order item

Use the new `SalesTransactionItemShape` object.

Define the type of sales transaction. For example, cart, quote, or order

Use the new `SalesTransactionShape` object.

Create relationships between sales transaction shape items. For example, you can create product bundles or product sets

Use the new `SalesTrxnItemRelationShape` object.

Track the status of your asynchronous process

Use the new `RevenueAsyncOperation` object.

Learn which asynchronous process and which REST requests are related to your error log

Use the new `RequestIdentifier` and `RevenueAsyncOperationId` fields in the `RevenueTransactionErrorLog` object.

Create database objects for the products associated with your main product bundles or sets. For example, you can create an object for a controller (the associated component) in a game console (the main product) bundle.

Use the new `ProductRelatedComponent` object.

Get more information on the status of an invoice batch run or invoice batch run recovery

Use the new values added to the `RecoveryStatus` and `Status` fields in the existing `InvoiceBatchRun` object.

Get information on the number of billing schedules that were recovered and unrecovered, and the number of unprocessed invoices

Use the new `TotalBillSchedRecovered`, `TotalBillSchedUnrecovered`, and `TotalInvoicesCanceled` fields in the existing `InvoiceBatchRun` object.

Get information about an invoice batch run recovery procedure

Use the new `InvoiceBatchRunRecovery` object.

Learn about the source, type, value, and priority of an order's adjustment, for example, a discount

Use the new `AdjustmentSource`, `AdjustmentType`, `AdjustmentValue`, and `Priority` fields in the existing `OrderAdjustmentGroup` object.

Store historical data for Quote and QuoteLineItem records

Use the new `QuoteHistory` and `QuoteLineItemHistory` associated objects.

Sales

Capture data import status when importing contacts and leads

Use the new `ObjectDataImport` and `ObjectDataImportReference` objects.

Calculate forecasts using custom dates

Use the new `OpportunityCustomDate` and `OLIMeasureOppCustomDateOnly` values in the `DateType` field on the `ForecastingType` object. The custom date field must be on the `Opportunity` object and based on the `Date` type.

Identify the value of a forecast amount

Use the `TargetValue` field on the `ForecastingFact` object to get the target forecast amount.

Inspect the details of user-created automated actions

Use the new `AutomatedAction`, `AutomatedActionCondition`, and `AutomatedActionParameter` objects.

Identify whether a Sales Engagement cadence is a standard or quick cadence

Use the `Type` field on the `ActionCadence` object.

View pipeline changes for key time periods in Pipeline Inspection

Use the `ChangePeriodStartDate` and `ChangePeriodLiteralType` fields on the `PipelineInspectionListView` object.

These fields control the timeframe for the set of metrics that shows changes to deals over time.

Salesforce Contracts**Configure the clause category that the user can use in a response document.**

Use the new `ClauseCatgConfiguration` object.

Identify the clause that can be associated with multiple documents.

Use the new `DocumentClause` object.

Specify grouping for clauses based on set of languages.

Use the new `DocumentClauseSet` object.

Define a collection of fields to configure the external document storage for an object.

Use the new `ExternalDocStorageConfig` object.

Specify the link between the object state definition and object state transition based on a defined action.

Use the new `ObjectStateActionDefinition` object.

Determine a junction between object state transition and object state action definition.

Use the new `ObjectStateTransitionAction` object.

Salesforce Flow**View the logs of a screen flow interview**

Use the new `FlowInterviewLog` object.

View the log of a specific element that's executed by a screen flow interview

Use the new `FlowInterviewLogEntry` object.

View the rules for sharing a `FlowInterviewLog` with users other than the owner

Use the new `FlowInterviewLogOwnerSharingRule` object.

View the details of a flow

Use the new `FlowRecord` object.

View a single element within a flow version

Use the new `FlowRecordElement` object.

View the version of a flow

Use the new `FlowRecordVersion` object.

View the ID for a `FlowVersionView`

Use the `FlowVersionViewId` field on the `FlowInterview` object. Introduced in API version 51.0, this field has been added to the *Object Reference for the Salesforce Platform*.

View the status of a flow interview

Use the `InterviewStatus` field on the `FlowInterview` object. Introduced in API version 50.0, this field has been added to the *Object Reference for the Salesforce Platform*.

Reference the API version in which a migration fails

Use the new `failedMigrationToolVersion` field on the `WorkflowRule` object. Introduced in API version 54.0, this field has been added to the *Object Reference for the Salesforce Platform*.

Salesforce Scheduler**Specify the appointment type for the appointment invitation**

Use the new `AppointmentType` field on the `AppointmentInvitation` object.

Specify the engagement channel type for the appointment invitation

Use the new `EngagementChannelTypeId` field on the `AppointmentInvitation` object.

Indicate whether Salesforce Scheduler must consider the service resource record for scheduling appointments

Use the new `IsPrimary` field on the `ServiceResource` object.

Specify the start time interval in minutes for the work type

Use the new `ApptStartTimeIntvlInMin` field on the `WorkType` object.

Security, Identity, and Privacy**Track logins that use insecure flows**

Use the `LoginSubType` field on the `LoginHistory` object and the `LOGIN_SUB_TYPE` and `LOGIN_TYPE` fields on the `Login Event Type` of the `EventLogFile`.

View consent status for communication preferences

Use the new `PrivacyConsentStatus` field on the existing `CommSubscriptionConsent` object.

Store historical data for Seller records

Use the new `SellerHistory` associated object.

Specify that a seller specializes in marketplace sales

Use the new supported value `Marketplace` in the existing `SellerType` field on the `Seller` object.

Store org features across all tenants in Security Center

Use the new `TenantSecurityFeature` object.

Determine whether a user has registered a WebAuthn-compatible security key.

Use the `HasSecurityKey` field on the `TwoFactorMethodInfo` object.

Service**View context data for a conversation or a conversation participant**

Use the new `ContextParamMap` object.

View participants in a conversation

Use the new `Participant` object.

Configure actions available to Omni-Channel supervisors

Use the new `OmniSupervisorConfigAction` object. Introduced in API version 56.0, this object has been added to the *Object Reference for the Salesforce Platform*.

Identify the bot for work that's routed in Omni-Channel

Use the new `BotId` field in the `AgentWork` object. Introduced in API version 52.0, this field has been added to the *Object Reference for the Salesforce Platform*.

Set the frequency and timespan of After Conversation Work in Omni-Channel

Use the new `AcwExtensionCount` and `AcwExtensionDuration` fields in the `AgentWork` object. Introduced in API version 55.0, these fields have been added to the *Object Reference for the Salesforce Platform*.

Store language-related information that is generated for each AI model

Use the new `AiModelLanguage` object. Introduced in API version 55.0, this object has been added to the *Object Reference for the Salesforce Platform*.

Calculate estimated wait times for queues

For voice call transfers, use the `hasQueueWaitTime` field in the `CapabilitiesResult` object to determine whether estimated wait times for queues are calculated by Salesforce or the partner telephony provider.

New and Changed Standard Platform Events

Receive real-time notifications from Salesforce by subscribing to the channels of these new and changed standard platform events.

Commerce**Be notified when a fulfillment order's Status changes to or from Pack Complete**

Use the new `Pack Complete` values in the existing `NewStatus` and `OldStatus` fields on `FOStatusChangedEvent`.

Be notified when a process exception is created due to a place order failure

Use the new `Place Order Failed` value in the existing `ExceptionType` field on `ProcessExceptionEvent`.

Revenue**Removed: AssetCancelErrorDtlEvent**

The `AssetCancelErrorDtlEvent` event and the `AssetCancelErrorDetailEvents` field in the `AssetCancelInitiatedEvent` event are removed in API version 57.0 and later. Instead, use the `RevenueTransactionErrorLog` object.

Removed: AssetAmendErrorDtlEvent

The `AssetAmendErrorDtlEvent` event and the `AssetAmendErrorDtlEvent` field in the `AssetAmendInitiatedEvent` event are removed in API version 57.0 and later. Instead, use the `RevenueTransactionErrorLog` object.

Removed: AssetRenewErrorDtlEvent

The `AssetRenewErrorDtlEvent` event and the `AssetRenewErrorDtlEvent` field in the `AssetRenewInitiatedEvent` event are removed in API version 57.0 and later. Instead, use the `RevenueTransactionErrorLog` object.

Security, Identity, and Privacy**Monitor file downloads**

Subscribe to the `FileEvent` (beta) platform event for near real-time visibility into file downloads. The `FileEventStore` (beta) big object retains six months of file download history. Create transaction security policies triggered by file downloads.

Bulk APIs

Added eight PK chunking-enabled objects for better query performance.

Use Eight New PK Chunking-Enabled Objects with Bulk API and Bulk API 2.0

Extended coverage across more objects improves query performance. You can now request PK chunking for Bulk API queries for these objects. Bulk API 2.0 makes the request automatically.

- `CaseRelatedIssue`
- `ChangeRequestRelatedIssue`

- [ChangeRequestRelatedItem](#)
- [Contract](#)
- [Entitlement](#)
- [IncidentRelatedItem](#)
- [ProblemIncident](#)
- [ProblemRelatedItem](#)

For a complete list of PK chunking supported objects, see the *Salesforce Developer Documentation*.

Salesforce Bulk API 2.0 and Bulk API Developer Guide: [PK Chunking Header](#)

Salesforce Bulk API 2.0 and Bulk API Developer Guide: [How Requests Are Processed](#)

Connect REST API

Integrate mobile apps, intranet sites, and third-party web applications with Salesforce using Connect REST API.

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:

[ConnectApi \(Connect in Apex\): New and Changed Classes and Enums](#)

[Connect REST API Developer Guide](#)

[Apex Reference Guide: ConnectApi Namespace](#)

New and Changed Connect REST API Resources

These resources are new or have changes.

Commerce

Create an asynchronous product import job

Make a POST request to the new `/commerce/management/import/product/jobs` resource.

New request body: Global Product Import Input

New response body: Global Product Import

Get the status of an asynchronous product import job

Make a GET request to the new `/commerce/management/import/product/jobs/jobId` resource.

New response body: Global Product Import

Cancel an asynchronous product import job

Make a PATCH request to the new `/commerce/management/import/product/jobs/jobId` resource.

New request body: Product Import Cancel Input

New response body: Global Product Import

Get a log of search index builds for a webstore.

Make a GET request to the new `/commerce/management/webstores/webstoreId/search/index-logs` resource.


New response body: Search Index Log Collection

Get a collection of addresses for a webstore account, excluding countries not supported by the webstore

Make a GET request to the existing `/commerce/webstores/webstoreId/accounts/accountId/addresses` resource.

New request parameter: `excludeUnsupportedCountries`

Create pending order summaries from order summary graphs (developer preview)


 **Note:** This feature is available as a developer preview. It isn't generally available unless or until Salesforce announces its general availability in documentation or in press releases or public statements. All commands, parameters, and other features are subject to change or deprecation at any time, with or without notice.

Make a POST request to the new `/commerce/order-summaries` resource.

New request body: Order Summary Graphs Input

New response body: Order Summary Graphs Output

Evaluate promotions based on shipping

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

Make a POST request to the existing `/commerce/promotions/actions/evaluate` resource.

New request parameter: `cartDeliveryGroups`

Set or verify the currency code of the cart

- Make a GET, PUT, or DELETE request to the existing `/commerce/webstores/webstoreId/carts/cartStateOrId` resource.
- Make a GET or POST request to the existing `/commerce/webstores/webstoreId/carts/cartStateOrId/cart-coupons` resource.
- Make a DELETE request to the existing `/commerce/webstores/webstoreId/carts/cartStateOrId/cart-coupons/cartCouponID` resource.
- Make a GET or POST request to the existing `/commerce/webstores/webstoreId/carts/cartStateOrId/cart-items` resource.
- Make a POST request to the existing `/commerce/webstores/webstoreId/carts/cartStateOrId/cart-items/batch` resource.
- Make POST request to the existing `/commerce/webstores/webstoreId/carts/cartStateOrId/cart-items/cartItemID` resource.
- Make a POST request to the existing `/commerce/webstores/webstoreId/carts/cartStateOrId/cart-items/promotions` resource.
- Make a GET request to the existing `/commerce/webstores/webstoreId/carts/cartStateOrId/promotions` resource.

New optional request parameter: `currencyIsoCode`

Use a webstore's order summary to add an order to a cart

Make a POST request to the new

`/commerce/webstores/webstoreId/order-summaries/orderSummaryId/actions/add-order-to-cart` resource.

New request body: Order To Cart Input

New response body: Order To Cart Result

Get a collection of child products related to a parent product

Make a GET request to the new `/commerce/webstores/webstoreId/products/productId/children` resource.

New response body: Product Child Collection

Data Cloud, Formerly Customer Data Platform

Create an identity resolution ruleset

Make a POST request to the new `/ssot/identity-resolutions` resource.

New request body: Data Cloud Identity Resolution Config Input

New response body: Data Cloud Identity Resolution Output

Get identity resolution rulesets

Make a GET request to the new `/ssot/identity-resolutions` resource.

New response body: Data Cloud Identity Resolutions Output

Delete an identity resolution ruleset

Make a DELETE request to the new `/ssot/identity-resolutions/identityResolutionRuleset` resource.

Get an identity resolution ruleset

Make a GET call to the new `/ssot/identity-resolutions/identityResolutionRuleset` resource.

New response body: Data Cloud Identity Resolution Output

Update an identity resolution ruleset

Make a PATCH request to the new `/ssot/identity-resolutions/identityResolutionRuleset` resource.

New request body: Data Cloud Identity Resolution Config Patch Input

New response body: Data Cloud Identity Resolution Output

Publish a segment

Make a POST request to the new `/ssot/segments/segmentId/actions/publish` resource.

New response body: Data Cloud Segment Action Output

Publishing a segment is available in version 56.0 and later, but was previously undocumented.

Run an identity resolution ruleset job

Make a POST call to the new `/ssot/identity-resolutions/identityResolutionRuleset/actions/run-now` resource.

New request body: Data Cloud Identity Resolution Run Now Input

New response body: Data Cloud Identity Resolution Run Now Output

Get calculated insights

Make a GET request to the new `/ssot/calculated-insights` resource.

New response body: Data Cloud Calculated Insight Collection

Create a calculated insight

Make a POST request to the new `/ssot/calculated-insights` resource.

New request body: Data Cloud Calculated Insight Input

New response body: Data Cloud Calculated Insight

Get a calculated insight

Make a GET request to the new `/ssot/calculated-insights/apiName` resource.

New response body: Data Cloud Calculated Insight

Update a calculated insight

Make a PATCH request to the new `/ssot/calculated-insights/apiName` resource.

New request body: Data Cloud Calculated Insight Input

New response body: Data Cloud Calculated Insight

Delete a calculated insight

Make a DELETE request to the new `/ssot/calculated-insights/apiName` resource.

Trigger a run for a calculated insight

Make a POST request to the new `/ssot/calculated-insights/apiName/actions/run` resource.

New response body: Data Cloud Calculated Insight Action Run Response

Salesforce CMS

Search for managed content items, including variants and folders, in spaces and folders in enhanced CMS workspaces

Make a GET request to the new `/connect/cms/items/search` resource.

New required request parameters: `contentSpaceOrFolderIds`, `queryTerm`

New response body: Managed Content Search Result Items Collection

Get a piece of managed content in CMS or enhanced CMS workspaces

Make a GET request to the new `/connect/cms/contents/contentKeyOrId` resource.

Delete a variant

Make a DELETE request to the existing `/connect/cms/contents/variants/variantId` resource.

Deleting a variant is available in version 54.0 and later, but was previously undocumented.

Salesforce Scheduler

Filter the list of service territories by territory IDs

Make a GET request to the existing `/connect/scheduling/service-territories` resource.

New optional query parameter: `filterByTerritoryIds`

Voice Calls

Upload an audio file that resides on a third-party vendor's system

Make a POST request to the existing `/voicecalls/voiceCallId/audio_upload` resource.

New request parameters: `name`, `recordingURL`

Changed Connect REST API Request Bodies

These request bodies have changes.

Commerce

Cart Input

This request body has this new property.

- `currencyIsoCode`—Currency ISO of the cart.

Change Item Input

This request body has these new properties.

- `changeItemFees`—List of input data for fees associated with the order item being returned or canceled.

Commerce Address Input

This request body has these new properties.

- `companyName`—The address company name.
- `firstName`—The address first name.
- `lastName`—The address last name.
- `middleName`—The address middle name.
- `phoneNumber`—The address phone number.

Import Settings Input

This request body has this new property.

- `webstore`—Webstore to associate with an asynchronous product import job. If no webstore is specified, the imported products are made globally available. If webstore is included, the import is for the specified store.

Order Summary Input

This request body has this new property.

- `sourceProcess`—Specifies whether the OrderSummary is being created by an Order on Behalf Of process (`OrderOnBehalf`) or not (`Standard`).

Promotion Cart Item Input

This request body has these new properties.



Note: These properties are used to support shipping promotions. To enable shipping promotions, contact Salesforce Customer Support.

- `cartDeliveryGroupId`—ID of the cart delivery group.
- `type`—Whether a cart item is a product or delivery charge.

Data Cloud, Formerly Customer Data Platform

Data Cloud Segment Input

This request body has these new properties.

- `dataSpace`—Segment data space.
- `displayName`—Segment display name.
- `segmentOnApiName`—API name of the SegmentOn entity.

Experience Cloud Sites

Community Input

This request body has this changed property.

- `templateParams`—Now supports `"webstoreId": "WebstoreId"` when creating an Experience Cloud site using the B2B Aura, B2B LWR, and B2C templates.

Messaging Channels

Messaging Channel Input

This request body has this new property.

- `externalAccountId`—ID of an account of the external channel specified in `messageType`.

Named Credentials

Credential Input

This request body has this new property.

- `authenticationProtocolVariant`—Authentication protocol variant of the external credential.

Salesforce CMS

Managed Content Publish Input

This request body has these changes.

- `includeContentReferences`—Specifies whether to include content references (`true`) or not (`false`).
- `variantIds`—IDs of variants to publish. All variants must be from the same content space.

Managed Content Unpublish Input

This request body has this change.

- `variantIds`—IDs of variants to unpublish. All variants must be from the same content space.

Surveys

Survey Response Input

This request body has this change.

- `navigationActions`—Available navigation actions on the survey page.

Voice Calls

Connectors Call Input

This request body has this new property.

- `vendorType`—Specifies the call vendor.

Changed Connect REST API Response Bodies

These response bodies have changes.

Commerce

Application Context

This response body has these new properties.

- `guestBrowsingEnabled`—Indicates if guest browsing is enabled (`true`) or not (`false`).
- `sessionDrivenCurrency`—Indicates whether to base the currency on the session context value (`true`) or not (`false`).

Cart Item

This response body has this new property.

- `currencyIsoCode`—Currency ISO code of the cart.

Cart Promotion

This response body has this new property.

- `currencyIsoCode`—Currency ISO code of the cart.

Change Item Output

This response body has these new properties.

- `totalFeeAmount`—Total amount of the fees charged for the change.
- `totalFeeTaxAmount`—Total amount of tax on the fees charged for the change.

Commerce Address

This response body has these new properties.

- `companyName`—The address company name.
- `firstName`—The address first name.
- `lastName`—The address last name.
- `middleName`—The address middle name.
- `phoneNumber`—The address phone number.

Commerce Search Index

This response body has these new properties.

- `indexBuildType`—Build type of the index.
- `isIncrementable`—Specifies whether the index allows incremental indexing (`true`) or not (`false`).
- `lastcatalogSnapshotTime`—Catalog snapshot time of the index.

Promotion Evaluation

This response body has these changed properties.

- `cart`—Type changed from Cart Output to Promotion Cart.
- `coupons`—Type changed from Coupon to Promotion Coupon.

Submit Cancel Output

This response body has this new property.

- `feeChangeOrderId`—ID of the change order created by canceling order items with associated cancel fees. Use this change order to create an invoice.

Submit Return Output

This response body has this new property.

- `feeChangeOrderId`—ID of the change order created by returning order items with associated return fees. Use this change order to create an invoice.

Data Cloud, Formerly Customer Data Platform**Data Cloud Segment**

This response body has these new properties.

- `dataSpace`—Segment data space.
- `displayName`—Segment display name.

- `excludeCriteria`—Segment exclude criteria.
- `includeCriteria`—Segment include criteria.
- `nextPublishDateTime`—Date and time of the next segment publish.

Named Credentials

Credential

This response body has this new property.

- `authenticationProtocolVariant`—Authentication protocol variant of the external credential.

External Credential

This response body has these new properties.

- `authenticationProtocolVariant`—Authentication protocol variant of the external credential.
- `customHeaders`—List of custom headers.
- `parameters`—List of parameters of the external credential.

Salesforce CMS

Managed Content Channel

This response body has this new property.

- `mediaCacheControlMaxAge`—HTTP cache control max age response header for media delivered from the channel.

Managed Content Document

This response body has this new property.

- `versionNumber`—Version number of the managed content.

Managed Content Variant

This response body has this new property.

- `status`—Status of the managed content variant.

Surveys

Survey Description Output

This response body has these new properties.

- `navigationActions`—Available navigation actions on the survey page.
- `responseId`—ID of the survey response.

Survey NPS Question Output

This response body has this new property.

- `responseValue`—Value of the response to an NPS question in a survey.

Survey Response Output

This response body has these new properties.

- `flowInterviewState`—State of the flow interview.
- `invitationId`—ID of the survey invitation that's related to the request.
- `navigationActions`—Available navigation actions on the survey page.
- `responseId`—ID of the survey response.

Survey Selection Question Output

This response body has this new property.

- `responseValues`—List of survey response values for a selected question.

Survey Short-Text Question Output

This response body has this new property.

- `responseValue`—Value of the response to a short-text question in a survey.

Survey Text Question Output

This response body has this new property.

- `responseValue`—Value of the response to a long-text question in a survey.

CRM Analytics REST API

Use the CRM Analytics REST API to schedule app data refreshes and add interactions to dashboard widgets.

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](#)

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[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 the settings for a folder

Make a GET request to the new `/wave/folders/folderId/settings` resource.

New response body: Analytics App Setting Collection

Update the settings for a folder

Make a PUT request to the new `/wave/folders/folderId/settings` resource.

New request body: Analytics App Setting Collection Input

New response body: Analytics App Setting Collection

Get the schedule for a folder

Make a GET request to the new `/wave/folders/folderId/schedule` resource.

New response body: Wave Folder Schedule

Update the schedule for a folder

Make a PATCH request to the new `/wave/folders/folderId/schedule` resource.

New request body: Wave Folder Schedule Input

New response body: Wave Folder Schedule

Delete the schedule for a folder

Make a DELETE request to the new `/wave/folders/folderId/schedule` resource.

Get folders by template filters

Make a GET request to the `/wave/folders` resource.

New request parameter: `templateFilters`. Valid values are `AppsConstructedByTemplate` and `AppsWithInstallHistory`.

Get collections by visibility

Make a GET request to the `/wave/collections` resource.

New request parameter: `visibleOnly`

Use new interactions in dashboard widgets

Make a GET request to the `/wave/dashboards` resource.

Response body includes new `Interaction` and `Interaction Action` representations.

Changed CRM Analytics REST API Request Bodies

These request bodies have changes.

Aggregate Flex Step Input

The request body has this new property.

- `values` — A map of dynamic data values.

Dashboard Input

The request body has this new property.

- `clonedTemplateOrigin` — The dashboard's corresponding template origin if the dashboard was cloned from another dashboard that was created by a template.

Dashboard State Input

The request body has this new property.

- `dataSourceLinksInfo` — The related information for data source links.

Repeater Widget Parameters Input

The request body has this new property.

- `interactions` — The interactions for the widget.

Saql Step Input

The request body has this new property.

- `values` — A map of dynamic data values.

Table Widget Parameters Input

The request body has these new properties.

- `columns` — The columns for widget-level projections.
- `interactions` — The interactions for the widget.

Text Widget Parameters Input

The request body has these new properties.

- `conditionalFormattingSource` — The conditional formatting source for the widget.
- `interactions` — The interactions for the widget.

Xmd Base Input Measure

The request body has this new property.

- `currencySettings` — The currency settings for the supported currencies of a currency field.

Changed CRM Analytics REST API Response Bodies

These response bodies have changes.

Aggregate Flex Step

The response body has this new property.

- `values`— A map of dynamic data values.

Base Templated Asset

The response body has this new property.

- `clonedTemplateOrigin`— The asset's corresponding template origin if the asset was cloned from another asset that was created by a template.

Dashboard State

The response body has this new property.

- `dataSourceLinksInfo`— The related information for data source links.

Dataflow Job

The response body has this new property.

- `transformNodes`— The transformation nodes for the dataflow job.

Dataflow Node

The response body has these new properties.

- `errorMessage`— The error message if the dataflow node failed.
- `label`— The label for the input or output source.
- `outputRowCount`— The count of the output rows.
- `outputSizeInBytes`— The size of the output in bytes.
- `status`— The status of the node. Valid values are: `Failure`, `Preprocessing`, `Queued`, `Running`, `Success`, and `Warning`.

Query

The response body has this new property.

- `warnings`— A collection of warnings. Each warning contains a `code` and a `message`.

Repeater Widget Parameters

The response body has this new property.

- `interactions`— The interactions for the widget.

Saql Step

The response body has this new property.

- `values`— A map of dynamic data values.

Table Widget Parameters

The response body has these new properties.

- `columns`— The columns for widget-level projections.
- `interactions`— The interactions for the widget.

Text Widget Parameters

The response body has these new properties.

- `conditionalFormattingSource`— The conditional formatting source for the widget.
- `interactions`— The interactions for the widget.

Wave Collection List

The response body has this new property.

- `totalCollectionCount`— The total size of the accessible items in the collection, with no visibility or pinning filters applied.

Wave Collection

The response body has these new properties.

- `isVisible`— Indicates whether the collection is visible (`true`) or not (`false`).
- `pinnedBy`— The type of user that created the pin. Valid values are `Admin`, `None`, and `User`.

Wave Features

The response body has these new properties.

- `orgCanViewDataStories`— Indicates whether the org has data stories enabled (`true`) or not (`false`).
- `orgCanViewLivePreviews`— Indicates whether the org has live previews enabled (`true`) or not (`false`).
- `orgCanViewThumbnailsforOA`— Indicates whether the org has thumbnails for Lightning Experience reports and dashboards enabled (`true`) or not (`false`).

Xmd Dataset

The response body has these new properties.

- `baseCurrency`— The base currency for the dataset.
- `supportedCurrencies`— A list of all supported currencies for the dataset.

Xmd Measure

The response body has this new property.

- `currencySettings`— The currency settings for the supported currencies of a currency field.

Einstein Discovery REST API

Use the Einstein Discovery REST API to configure validation for stories.

IN THIS SECTION:

[Changed Einstein Discovery REST API Request Bodies](#)

These request bodies have changes.

[Changed Einstein Discovery REST API Response Bodies](#)

These response bodies have changes.

Changed Einstein Discovery REST API Request Bodies

These request bodies have changes.

Smart Data Discovery AI Model Input

The request body has this new property.

- `modelFields`— The list of model fields for the model.

Smart Data Discovery Model Input

The request body has this new property.

- `prescribableFields`— The list of prescribable fields for the model.

Story Input

The request body has this new property.

- `validationConfiguration`— The validation configuration for the story.

Story Version Input

The request body has these new properties.

- `processedRowCount`— The number of rows processed in building the analysis.
- `samplingStrategy`— The sampling strategy associated with the story version. Valid values are `Discovery` and `None`.

Changed Einstein Discovery REST API Response Bodies

These response bodies have changes.

Smart Data Discovery AI Model

The response body has this new property.

- `modelFields`— The list of model fields for the model.

Smart Data Discovery Model

The response body has this new property.

- `prescribableFields`— The list of prescribable fields for the model.

Story

The response body has this new property.

- `validationConfiguration`— The validation configuration for the story.

Story Update

The response body has this new property.

- `validationConfiguration`— The validation configuration for the story update.

Story Version

The response body has these new properties.

- `processedRowCount`— The number of rows processed in building the analysis.
- `samplingStrategy`— The sampling strategy associated with the story version. Valid values are `Discovery` and `None`.
- `validationConfiguration`— The validation configuration for the story version.

Metadata API

Access more metadata through these new and changed metadata types.

Accounting Subledger

Create mappings of the financial data model to a logical data model to generate Transaction Journal records

Use the new `AccountingModelConfig` metadata type.

Turn on the Accounting Subledger features

Use the new `AccountingSettings` metadata type.

Analytics

Enable new Analytics features for viewing live previews and thumbnails for Lightning Experience reports and dashboards

Enable these features using new fields on the `AnalyticsSettings` metadata type.

- To enable access to live previews of data, use the `enableOrgCanSeeLivePreviews` field.
- To enable access for thumbnails of Lightning Experience reports and dashboards, use the `enableOrgCanViewThumbnailForOA` field.

Customization

Create custom forecast pages using Lightning App Builder

Use the `ForecastingPage` value of the `type` field of the `FlexiPage` metadata type to define a Lightning page that overrides the default forecasts page in Lightning Experience.

Set save options in Dynamic Forms-enabled record pages

Use the `ComponentInstanceProperty` subtype on the `FlexiPage` metadata type to define the values for a Save Options checkbox when users edit a Dynamic Forms-enabled account record page or create, edit, or clone a Dynamic Forms-enabled case or lead record page. Set the `name` field to `saveOptions` and use `value` to define the checkbox values. For more details, see [FlexiPage](#) (can be outdated or unavailable during release preview).

Use an ID to reference a Named Credential

Use the `NamedCredentialReferenceId` field on the existing `ExternalServiceRegistration` metadata type to define a reference ID for a named credential. When used, `NamedCredentialReferenceId` supersedes `namedCredential`.

Create or modify user access policies

Use the new `UserAccessPolicy` metadata type.



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

Data Cloud

Create segment definition packages and publish on AppExchange

Use the new `MarketSegmentDefinition` metadata type to create segment definition packages, pass segment definition in the form of data build tool (DBT), and publish it on AppExchange for subscriber organizations to install and instantiate these segments. Introduced in API version 55.0, this type has been added to the *Metadata API Developer Guide*.

Experience Cloud

Create a `PersonAccountOwnerPowerUser` object to enable a user to own more than 50,000 customer or partner portal accounts.

Use the new `PersonAccountOwnerPowerUser` metadata type.

Sales

Turn on Account Discovery dashboards and analytics

Use the new `enableAccountDiscovery` field on the existing `AccountSettings` metadata type.

Turn on simplified flow to import contact and leads

Use the new `DataImportManagementSettings` metadata type.

Manage forecast category metric configurations that appear in the Pipeline Inspection view

Use the new `PipelineInspMetricConfig` and `PipelineInspMetricConfigTranslation` metadata types.

Turn on pipeline changes and forecast category metric options in Pipeline Inspection

Use the new `enableForecastCategoryMetrics` and `enablePipelineChangesMetrics` fields on the existing `OpportunitySettings` metadata type.

Specify lead access levels and track assignment history

Use the new `objectAccessLevels` field on the existing `Territory2` metadata type and the new `supportedObjects` and `tm2EnableUserAssignmentLog` fields on the existing `Territory2Settings` metadata type.

Net zero

Add additional fuel types

Use the new `FuelType` metadata type.

Define a mapping between custom fuel types and their corresponding unit of measure (UOM) values

Use the new `FuelTypeSustnUom` metadata type.

Specify a unit of measure conversion for custom fuel types

Use the new `SustnUomConversion` metadata type.

Salesforce Contracts

Specify clause category for a contract document

Use the new `ClauseCatgConfiguration` metadata type.

Define configuration to store contract documents on external devices

Use the new `ExternalDocStorageConfig` metadata type.

Salesforce Flow

Track external services created by a sample API request and response

Use the new `SchemaInferred` value in the existing `ExternalServiceRegistrationProviderType` field on the `ExternalServiceRegistration` metadata type.

Create workflows in Salesforce CMS

Use the new `ManagedContentAuthoringWorkflow` value in the existing `processType` field on the `Flow` metadata type. For more details, see [CMS Workflows and Approvals \(Beta\)](#).

Send API name of a survey in a live message notification

Use the new `liveMessageNotification` value in the existing `actionType` field, which is on the existing `FlowActionCall` subtype of the Flow metadata type.

View the API version that defines the execution behavior of the flow

Use the new `apiVersion` field on the existing Flow metadata type. Introduced in API version 50.0, this field has been added to the *Metadata API Developer Guide*.

View the ID that defines the time zone in which the flow runs

Use the new `timeZoneSidKey` field on the existing Flow metadata type. Introduced in API version 56.0, this field has been added to the *Metadata API Developer Guide*.

View the transaction model for flows

Use the new `flowTransactionModel` field, which is on the existing `FlowActionCall` subtype of the Flow metadata type. Introduced in API version 51.0, this field has been added to the *Metadata API Developer Guide*.

View the rule to assign value to the field reference

Use the new `mapItems` field on the existing Flow metadata type. Introduced in API version 51.0, this field has been added to the *Metadata API Developer Guide*.

View a node that processes the contents of a collection

Use the new `collectionProcessors` field on the existing Flow metadata type. Introduced in API version 50.0, this field has been added to the *Metadata API Developer Guide*.

View how to set the sorting field, sort order, and placement of empty or null values in a sorted collection

Use the new `sortOptions` field on the `FlowCollectionProcessor` subtype. Introduced in API version 51.0, this field has been added to the *Metadata API Developer Guide*.

View the filter logic applied to the filter condition requirements

Use the new `filterLogic` field, which is on the existing `FlowRecordLookup` subtype of the Flow metadata type. Introduced in API version 50.0, this field has been added to the *Metadata API Developer Guide*.

View an array of columns to display in a section, or an array of fields to display in a column

Use the new `fields` field, which is on the existing `FlowScreenField` subtype of the Flow metadata type. Introduced in API version 49.0, this field has been added to the *Metadata API Developer Guide*.

Select whether the flow remembers the input value if the user moves to any screen and then returns to the screen component

Use the new `inputsOnNextNavToAssocScrn` field, which is on the existing `FlowScreenField` subtype of the Flow metadata type. Introduced in API version 51.0, this field has been added to the *Metadata API Developer Guide*.

Specify that a screen field is a field from a Salesforce object

Use the new `ObjectProvided` value in the existing `FlowScreenFieldType` field, which is on the `FlowScreenField` subtype of the Flow metadata type. Introduced in API version 51.0, this field has been added to the *Metadata API Developer Guide*.

Specify that a screen field is a field from a Salesforce object

Use the new `ObjectProvided` value in the existing `fieldType` field, which is on the `FlowScreenField` subtype of the Flow metadata type. Introduced in API version 51.0, this field has been added to the *Metadata API Developer Guide*.

Specify that a screen field in a section is a column

Use the new `Region` value in the existing `fieldType` field, which is on the `FlowScreenField` subtype of the Flow metadata type. Introduced in API version 51.0, this field has been added to the *Metadata API Developer Guide*.

Specify that a screen field is a section

Use the new `RegionContainer` value in the existing `fieldType` field, which is on the `FlowScreenField` subtype of the Flow metadata type. Introduced in API version 51.0, this field has been added to the *Metadata API Developer Guide*.

Specify the translated label for the Back button

Use the new `backButtonLabel` field, which is on the existing `FlowScreenTranslation` subtype of the `Translations` metadata type. Introduced in API version 54.0, this field has been added to the *Metadata API Developer Guide*.

Specify the translated label for the Next or Finish button

Use the new `nextOrFinishButtonLabel` field, which is on the existing `FlowScreenTranslation` subtype of the `Translations` metadata type. Introduced in API version 54.0, this field has been added to the *Metadata API Developer Guide*.

Specify the translated label for the Pause button

Use the new `pauseButtonLabel` field, which is on the existing `FlowScreenTranslation` subtype of the `Translations` metadata type. Introduced in API version 54.0, this field has been added to the *Metadata API Developer Guide*.

Select whether a flow can be debugged as another user or not

Use the new `canDebugFlowAsAnotherUser` field on the existing `FlowSettings` metadata type. Introduced in API version 50.0, this field has been added to the *Metadata API Developer Guide*.

Select whether flow formula functions that generate HTML include encoded markers or not

Use the new `doesFormulaGenerateHtmlOutput` field on the existing `FlowSettings` metadata type. Introduced in API version 48.0, this field has been added to the *Metadata API Developer Guide*.

Select whether the rules for enforcing explicit access to Apex classes are disabled or not

Use the new `isFlowApexContextRetired` field on the existing `FlowSettings` metadata type. Introduced in API version 49.0, this field has been added to the *Metadata API Developer Guide*.

Select whether a valid session ID is returned in API .SessionID or not

Use the new `isFlowBlockAccessToSessionIDEnabled` field on the existing `FlowSettings` metadata type. Introduced in API version 56.0, this field has been added to the *Metadata API Developer Guide*.

Security and Identity

Bypass the public internet

Use the new `PrivateEndpoint` value of the `namedCredentialType` field on the existing `NamedCredential` metadata type.

Specify an outbound network connection when bypassing the internet

Use the existing `outboundNetworkConnection` field, as well as the new `outboundNetworkConnection` value of the `parameterType` field, both on the `NamedCredentialParameter` type.

Use authentication protocol variants with named credentials

Use the `AuthProtocolVariant` value of the `parameterType` field of the `ExternalCredentialParameter` metadata type to specify an authentication protocol variant, such as STS for AWS Sig v4 or JWT Bearer Flow for OAuth.

Specify an authentication provider endpoint

Use the `AuthProviderUrl` value of the `parameterType` field of the `ExternalCredentialParameter` metadata type to specify an identity provider token URL for OAuth JWT Bearer flow.

Specify a signing certificate to use with an authentication protocol variant

Use the `SigningCertificate` value of the `parameterType` field of the `ExternalCredentialParameter` metadata type to indicate the signing certificate used with OAuth or AWS Sig v4.

Use body and header JWT claims with named credentials

Use the `JWTBodyClaim` and `JWTHeaderClaim` values of the `parameterType` field of the `ExternalCredentialParameter` metadata type to specify JWT claims for OAuth authentication. You can use custom and default claims.

Export consumer secrets in auth providers as placeholder values

Use the existing `consumerSecret` field on the `AuthProvider` type to export consumer secrets as placeholder values. Encrypted secrets in all change sets and packages, including those generated before November 2022, are now always exported as placeholder

values regardless of the value you provide for `sendSecretInApis`. When you import an auth provider, the consumer secret is treated as a plaintext value, even if the value was encrypted when the auth provider was created.

Enable Salesforce as a SAML identity provider for single sign-on

Use the new `IdentityProviderSettings` metadata type.

Control whether the Authorization Code and Credentials Flow is enabled at an org-wide level

Use the `oAuthCdCrdtFlowEnable` field on the `OauthOidcSettings` metadata type. Introduced in API version 57.0, this field has been added to the *Metadata API Developer Guide*.

Service**Recreate Omni Supervisor configurations**

Use the new `OmniSupervisorConfig` metadata type.

Find contact, lead, or employee records that match a search term

Use the new `findMatchingIndividuals` enum of the `actionType` field on the `FlowActionCall` metadata subtype of the `Flow` metadata type.

Add a goal to a bot dialog

Use the new `conversationGoals` field on the `BotVersion` and `BotTemplate` metadata types. Use the new `conversationStepGoalMappings` field and the new `GoalStep` enum of the `type` field on the `BotStep` subtype of the `BotVersion` and `BotTemplate` metadata types.

DEPRECATED: The `logGoalAchieved` enum is deprecated in API version 57.0.

The `logGoalAchieved` enum of the `invocationActionType` field on the `BotInvocation` subtype of the `BotVersion` and `BotTemplate` metadata types, which is the previous method of adding a goal to a bot dialog, has been deprecated.

Send rich content with an enhanced bot

Use the `RichMessage` enum of the `type` field on the `BotStep` subtype of the `BotVersion` metadata type. Introduced in API version 54.0, this enum has been added to the *Metadata API Developer Guide*.

Trigger the Transfer to Agent or End Chat system dialogs in a bot

Use the `SystemMessage` enum of the `type` field on the `BotStep` subtype of the `BotVersion` metadata type. Introduced in API version 43.0, this enum has been added to the *Metadata API Developer Guide*.

Use an external service action with a bot

Use the `externalService` enum of the `invocationActionType` field on the `BotInvocation` subtype of the `BotVersion` metadata type. Introduced in API version 53.0, this enum has been added to the *Metadata API Developer Guide*.

Get feedback on Article Answers knowledge article results in a bot

Use the `logFeedback` enum of the `invocationActionType` field on the `BotInvocation` subtype of the `BotVersion` metadata type. Introduced in API version 51.0, this enum has been added to the *Metadata API Developer Guide*.

Redirect to an object variable in a bot

Use the new `targetVariable` and `targetVariableType` fields on the `BotNavigationLink` subtype of the `BotVersion` and `BotTemplate` metadata types.

Receive a file with an enhanced bot

Use the new `successMessages` field and the new `CollectAttachment` enum of the `type` field on the `BotVariableOperation` subtype of the `BotVersion` and `BotTemplate` metadata types.

Transfer bot conversations to another bot

Use the `BotDefinition` enum of the `sourceType` field on the `BotVariableOperand` subtype of the `BotVersion` metadata type. Introduced in API version 46.0, this enum has been added to the *Metadata API Developer Guide*.

Transfer bot conversations to a queue

Use the `Queue` enum of the `sourceType` field on the `BotVariableOperand` subtype of the `BotVersion` metadata type. Introduced in API version 46.0, this enum has been added to the *Metadata API Developer Guide*.

Transfer enhanced bot conversations to an Omni-Channel flow

Use the `FlowDefinition` enum of the `sourceType` field on the `BotVariableOperand` subtype of the `BotVersion` metadata type. Introduced in API version 52.0, this enum has been added to the *Metadata API Developer Guide*.

Trigger the Error Handler system dialog when an error occurs inside of a bot conversation

Use the `ErrorHandling` enum of the `type` field on the `ConversationSystemDialog` subtype of the `BotVersion` metadata type. Introduced in API version 48.0, this enum has been added to the *Metadata API Developer Guide*.

Trigger the Knowledge Fallback system dialog when an error occurs inside of the Article Answers feature

Use the `KnowledgeFallback` enum of the `type` field on the `ConversationSystemDialog` subtype of the `BotVersion` metadata type. Introduced in API version 51.0, this enum has been added to the *Metadata API Developer Guide*.

REST API

REST API includes changes to the response for `/limits`, a new HTTP status code, and new and changed invocable actions.

IN THIS SECTION:

[New, Changed, and Deprecated Calls](#)

These calls are new, changed, or deprecated in API version 57.0.

[Invocable Actions](#)

Invocable Actions represent the actions that can be accomplished on Salesforce with APIs.

New, Changed, and Deprecated Calls

These calls are new, changed, or deprecated in API version 57.0.

Changed Calls

`/limits`

The `DailyBulkApiBatches`, `DailyGenericStreamingApiEvents`, and `DailyStreamingApiEvents` sections of the `/limits` response body have been simplified. Because the information was incomplete, the response no longer shows usage broken down by the different connected apps. These sections now appear like this:

```
...
  "DailyBulkApiBatches" : {
    "Max" : 15000,
    "Remaining" : 15000
  },
...
  "DailyGenericStreamingApiEvents" : {
    "Max" : 10000,
    "Remaining" : 10000
  },
...
  "DailyStreamingApiEvents" : {
    "Max" : 10000,
    "Remaining" : 10000
  }
```

```
} ,
...
```

428 HTTP Status Code

REST APIs that use [Conditional Request Headers](#) now return the 428 (Precondition Required) HTTP status code if the request could not be executed because it was not conditional.

Documentation

The REST API reference is reorganized to describe one resource per page

To improve the clarity of the *REST API Developer Guide*, each reference page describes one URI and one HTTP method that you can use to access that resource. Previously, several URIs and methods were combined on one page.

To view the changes, see the [Reference](#) page of the *REST API Developer Guide*.

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 changed:

Charge fees when canceling order products

Use the new `changeItemFees` input property on the existing `cancelOrderItemSummariesPreview` and `cancelOrderItemSummariesSubmit` actions.

Charge fees when returning order products

Use the new `changeItemFees` input property on the existing `returnOrderItemSummariesPreview` and `returnOrderItemSummariesSubmit` actions.

When creating an order summary, specify whether it's an Order on Behalf Of process

Use the new `sourceProcess` input property on the existing `createOrderSummary` action.

Send API name of a survey in a live message notification

Use the new `surveyDeveloperName` input property on the existing `liveMessageNotification` action.

Process up to 200 cadence targets per API call with the Sales Engagement invocable actions

Previously, the [Sales Engagement invocable actions](#) were limited to 20 records per call.

For more information on invocable actions, see the [Actions Developer's Guide](#).

Async SOQL Retirement

Async SOQL is scheduled for retirement in all Salesforce orgs in Summer '23.

Where: Async SOQL is used for Big Objects, Field Audit Trail, and the Connect REST API.

How: Use Bulk API and batch Apex to replace Async SOQL queries.

These examples are alternatives for existing Async SOQL queries.

Field Audit Trail

This example shows how to query `FieldHistoryArchive` and analyze a large number of results in a CSV format.

Example URI

```
/services/data/vXX.X/jobs/query
```

Example Post Request

```
{
  "operation": "query",
  "query": "SELECT ParentId, FieldHistoryType, Field, Id, NewValue, OldValueFROM
FieldHistoryArchive WHERE FieldHistoryType = 'Account' AND CreatedDate > LAST_MONTH"
}
```

Use the [Get Results for a Query Job](#) resource.

Example CURL Request

```
curl --include --request GET \
--header "Authorization: Bearer token" \
--header "Accept: text/csv" \
https://instance.salesforce.com/services/data/vXX.X/jobs/query/750R0000000zxr8IAA/results
?maxRecords=50000
```

This request results in a CSV file that can be examined for auditing purposes.

Customer 360 View

Batch Apex is an alternative to ASync SOQL for automated processing on a Big Object or ApiEvent, ReportEvent, or ListViewEvent. This example shows how to add processing that references correlated data.

Run a batch Apex query on a Big Object, and correlate the Contact information associated with that Big Object.

```
public class QueryBigObjectAndContact implements Database.Batchable<sObject> {
    private String key;
    public QueryBigObjectAndContact(String keyParam) {
        key = keyParam
    }

    public Iterable<sObject> start(Database.BatchableContext BC) {
        return [SELECT Big_Object_Field__c, Account__c FROM Big_Object__b WHERE
Big_Object_Primary_Key > key LIMIT 50000]
    }

    public void execute(Database.BatchableContext bc, List<Big_Object__b> bos){
        // process the batch of Big Objects and associate them to Accounts
        Map<Id, Big_Object__b> accountIdToBigObjectMap = new Map<Id, Big_Object__b>();
        for (Big_Object__b bigObject : bos) {
            accountIdToBigObjectMap.put(bigObject.Account__c, bigObject);
            key = bigObject.Big_Object_Primary_Key__c
        }
        Map<Id, Account> accountMap = new Map<Id, Account>([
            SELECT Id, Name, ... FROM Account WHERE Id IN :accountIdToBigObjectMap.keySet()
        ]);
        for (Id accountId : accountMap.keySet()) {
            Big_Object__b bigObject = accountIdToBigObjectMap.get(accountId);
            Account account = accountMap.get(accountId);
            // perform any actions that integrate the Big Object and Account
        }
    }

    public void finish(Database.BatchableContext bc){
        // You can daisy chain additional calls using the primary key of the Big Object
    }
}
```



```

to get around the 50k governor limit
    QueryBigObjectAndContact nextBatch = new QueryBigObjectAndContact(key);
    Database.executeBatch(nextBatch);
}
}

```

Real-Time Event Monitoring

This example shows how to query and analyze an event HBPO using a field's contents.

```

public class EventMatchesObject implements Database.Batchable<sObject> {
    private String lastEventDate;

    public EventMatchesObject(String lastEventDateParam) {
        lastEventDate = lastEventDateParam;
    }

    public Iterable<SObject> start(Database.BatchableContext bc) {
        return [SELECT EventDate, EventIdentifier, QueriedEntities, SourceIp, Username,
UserAgent FROM ApiEvent WHERE EventDate > lastEventDate LIMIT 50000]
    }

    public void execute(Database.BatchableContext bc, List<ApiEvent> events){
        // Process this list of entities if a certain attribute matches
        for (ApiEvent event: events) {
            String objectString = 'Patent__c';
            String eventIdentifier = event.EventIdentifier;
            if (eventIdentifier.contains(objectString) {
                // Perform actions on the event that contains 'Patent__c'
            }
            lastEventDate = format(event.EventDate);
        }
    }

    public void finish(Database.BatchableContext bc){
        // You can daisy chain additional calls using EventDate or other filter fields to
get around the 50k governor limit
        EventMatchesObject nextBatch = new EventMatchesObject(lastEventDate);
        Database.executeBatch(nextBatch);
    }
}

```

Aggregate Queries

This example shows an alternative for aggregate queries similar to the COUNT () method.

```

public class CountBigObjects implements Database.Batchable<sObject> {
    private Integer recordsCounted;
    private String key;

    public CountBigObjects(Integer recordsCountedParam, String keyParam) {
        recordsCounted = recordsCountedParam
        key = keyParam
    }
}

```

```

public Iterable<SObject> start(Database.BatchableContext bc) {
    return [SELECT Custom_Field__c FROM Big_Object__b LIMIT 25000]
}

public void execute(Database.BatchableContext bc, List<Big_Object__b> bos){
    // process the batch of Big Objects and associate them to Accounts
    Map<Id, Big_Object__b> accountIdToBigObjectMap = new Map<Id, Big_Object__b>();
    for (Big_Object__b bigObject : bos) {
        accountIdToBigObjectMap.put(bigObject.Account__c, bigObject);
    }
    Map<Id, Account> accountMap = new Map<Id, Account>(
        [SELECT Id, Name, ... FROM Account WHERE Id IN :accountIdToBigObjectMap.keySet()]
    );
    for (Id accountId : accountMap.keySet()) {
        Big_Object__b bigObject = accountIdToBigObjectMap.get(accountId);
        Account account = accountMap.get(accountId);
        // perform any actions that integrate the Big Object and Account
    }
}

public void finish(Database.BatchableContext bc) {
    // You can daisy chain additional calls using the primary key of the Big Object
    to get around the 50k governor limit
    CountBigObjects nextBatch = new CountBigObjects(recordsCounted, key);
    Database.executeBatch(nextBatch);
}
}

```

Tooling API New and Changed Objects

Access more metadata through these new and changed Tooling API objects.

Salesforce Overall

See the field type of a column in a related list

Use the new `DataType` field on the existing `RelatedListColumnDefinition` object.

Account Engagement (formerly Pardot)

Create and work with Account Engagement business units

Use the `PardotTenant` object to create, query, and update Account Engagement business units.

Customization

Query Delegated Group Admin Access via Tooling API

Use the `DelegatedGroup`, `DelegateGroupMember`, and `DelegateGroupGrant` objects to query on delegate group details.

Create or modify user access policies

Use the new `UserAccessPolicy`, `UserAccessPolicyAction`, and `UserAccessPolicyFilter` objects.



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](#).

Development

Determine if a Package Has Been Transferred

Use the `WasTransferred` field on the `Package2` object.

Specify the Default Language for a Package

Use the `Language` field on the `Package2VersionCreateRequest` object.

View the Default Language for a Package

Use the `Language` field on the `Package2Version` object.

Salesforce Flow

View a process's migrated criteria and the resulting migrated flow

Use the new `ProcessFlowMigration` object.

View the API version that defines the execution behavior of the flow

Use the `ApiVersion` field on the existing Flow object. Introduced in API version 50.0, this field has been added to the *Tooling API Reference and Developer Guide*.

View the ID that defines the time zone in which the flow runs.

Use the `TimeZoneSidKey` field on the existing Flow object. Introduced in API version 56.0, this field has been added to the *Tooling API Reference and Developer Guide*.

Security and Identity

Bypass the public internet

Use the new `PrivateEndpoint` value of the `NamedCredentialType` field on the existing `NamedCredential` metadata type.

Specify an outbound network connection when bypassing the internet

Use the existing `OutboundNetworkConnection` field, as well as the new `OutboundNetworkConnection` value of the `ParameterType` field, both on the `NamedCredentialParameter` type.

Use authentication protocol variants with named credentials

To specify an authentication protocol variant, such as STS for AWS Sig v4 or JWT Bearer Flow for OAuth, use the `AuthProtocolVariant` value of the `ParameterType` field of the `ExternalCredentialParameter` metadata type.

Specify an authentication provider endpoint

To specify an identity provider token URL for OAuth JWT Bearer flow, use the `AuthProviderUrl` value of the `ParameterType` field of the `ExternalCredentialParameter` metadata type.

Specify a signing certificate to be used with an authentication protocol variant

To indicate the signing certificate used with OAuth or AWS Sig v4, use the `SigningCertificate` value of the `ParameterType` field of the `ExternalCredentialParameter` metadata type.

Use body and header JWT claims with named credentials

To specify JWT claims for OAuth authentication, use the `JWTBodyClaim` and `JWTHeaderClaim` values of the `ParameterType` field of the `ExternalCredentialParameter` metadata type. You can use custom and default claims.

Service

Recreate Omni Supervisor configurations

Use the new `OmniSupervisorConfig` object.

User Interface API

Prevent duplication of records with idempotent record writes on more UI API resources, perform quick actions, and do more with related lists. The UI API also supports more objects.

Prevent duplication of records with idempotent record writes (Beta)



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

These `content-documents` resources now support idempotent record writes for the POST method.

- `/ui-api/records/content-documents/content-versions`
- `/ui-api/records/content-documents/{contentDocumentId}/content-versions`

Optimized output representation for file uploads

The Content Document Composite response body has changes.

- The `contentDocument` property now returns the Record type in its response. It no longer uses the Content Document type.
- The `contentVersion` property now returns the Record type in its response. It no longer uses the Content Version type.

The resources `/ui-api/records/content-documents/content-versions` and `/ui-api/records/content-documents/{contentDocumentId}/content-versions` no longer return every field that's defined for the object. Only required fields and fields that are explicitly defined are returned.

Make UI API calls consistently on Lightning Experience across all supported objects

Previously, UI API calls from Lightning Experience for some objects required you to use Apex instead of a Lightning Web Components (LWC) wire adapter or function. For example, you could work with the `ContentDocumentLink` object from an Apex method but not from the `lightning/uiRecordApi` module in LWC if the UI API call was made from Lightning Experience. This restriction is removed, and now you can make UI API calls consistently on Lightning Experience across all supported objects.

Specify fields when retrieving related list metadata

Use the new `fields`, `optionalFields`, and `restrictColumnsToLayout` request parameters when retrieving related list metadata via `/ui-api/related-list-info/`.

Retrieve and update related list user preferences

To retrieve user preferences for a related list, use the GET method with these resources.

- `/ui-api/related-list-preferences/`
- `/ui-api/related-list-preferences/batch/`

To update related list user preferences, use the PATCH method with `/ui-api/related-list-preferences/`.

Get more information about columns in a related list

Use the new `dataType`, `filterable`, `picklistValues`, and `quickFilterOperator` properties on the Related List Column response body.

Perform quick actions

To perform a quick action that creates or updates a record, use the POST method with `/ui-api/actions/perform-quick-action/{actionApiName}`.

Retrieve the actions on related lists

To retrieve the actions on a related list or a batch of related lists for a record without complex URL parameters, use the new POST method with these resources.

- `/ui-api/actions/record/{recordIds}/related-list/`
- `/ui-api/actions/record/{recordIds}/related-list/batch/`

Get the name of the Lightning web component associated with an action

The new `lwcComponent` property on the Platform Action response body returns more information about an action.

Work with more objects

These objects are now supported. List views and most recently used list views don't currently support these objects, unless otherwise noted.

- `AdUsage`
- `AssistantText`
- `BillingPeriodTaxItem`
- `CarePlanDetail`
- `CaseArticle`
- `ContractDocVersionSection`
- `CryptoTransEnvelopeChgLog`
- `DataAction`
- `DataActionTarget`
- `EmpUserProvisionProcessErr`
- `EnablementMeasureDefinition`
- `ExplainabilityMsgTemplate`
- `KnowledgeArticleVersion`—Supported in list views and most recently used list views
- `LeadLineItem`
- `LeadPreferredSeller`
- `LinkedArticle`
- `MarketingAppExtAction`
- `MarketingAppExtActivity`
- `MarketingAppExtAssignment`
- `MarketingAppExtension`
- `MktMLModel`
- `OpportunityPreferredSeller`
- `OrderAction`
- `PaymentIntent`
- `PrivacyReques`
- `ProductComponentGroup`
- `ProductRelatedComponent`
- `ProvisioningTargetGroup`
- `ProvisioningTargetItem`
- `ProvisioningTargetRole`
- `QuoteLinePriceAdjustment`
- `SchedulingConstraint`
- `ServiceAppointmentCapacityUsage`
- `ServiceResourcePreference`
- `SvcCatalogReqRelatedItem`

- TaxRate
- WorkCapacityLimit
- WorkCapacityUsage

GraphQL API

Filter records by location, use GraphQL API in Lightning Web Components, and more.

Run a location-based query

To run a location-based query, use the `orderBy` filter type on a geolocation field on your records.

```
query AccountsByLocation {
  uiapi {
    query {
      Account(orderBy:{
        Location__c:{
          distance:{
            latitude:47.6062
            longitude:122.3321
          },
          order:ASC
        }
      }) {
        edges {
          node {
            Id
            Name {
              value
            },
            Location__Latitude__s {
              value
            },
            Location__Longitude__s {
              value
            }
          }
        }
      }
    }
  }
}
```

The query is similar to this SOQL statement with the `WHERE` clause.

```
SELECT Name, Location__latitude__s, Location__longitude__s
FROM Account
ORDER BY DISTANCE(Location__c, GEOLOCATION(47.606, 122.332), 'mi') ASC
```

Filter a query by relative date

To filter records by relative date, use the `n*_ago` filters.

- `n_days_ago`
- `n_weeks_ago`
- `n_months_ago`

- `n_quarters_ago`
- `n_years_ago`
- `n_fiscal_quarters_ago`
- `n_fiscal_years_ago`

The relative date filters correspond to the [SOQL date literals](#). For example, you can filter records created 2 days ago.

```
query AccountsDaysAgo {
  uiapi {
    query {
      Account (
        where: {
          CreatedDate: {
            eq: { range: { n_days_ago: 2 } }
          }
        }
      ) {
        edges {
          node {
            Id
            CreatedDate {
              value
              displayValue
              format
            }
            Name {
              value
              displayValue
              label
            }
          }
        }
      }
    }
  }
}
```

The query is similar to this SOQL statement with the `WHERE` clause.

```
SELECT Id, CreatedDate, Name
FROM Account
WHERE CreatedDate = N_DAYS_AGO:2
```

Get related list metadata

To get related list metadata, query `relatedListByName` in the `uiapi` field. For example, you can query for the Opportunity related list on the Account object, similar to the

`/ui-api/related-list-info/{parentObjectApiName}/{relatedListId}` UI API resource.

```
{
  uiapi {
    relatedListByName(parentApiName: "Account", relatedListName: "Opportunities") {
      label
      parentApiName
    }
  }
}
```

```
        childApiName
      }
    }
  }
```

Use GraphQL API in Lightning Web Components (Pilot)

Fetch data from your components using the [GraphQL wire adapter](#) on page 185, equipped with client-side caching and data management similar to other Lightning Data Service wire adapters.

Einstein

Use Search Manager to configure searchable fields by profile, including picklists, so users get relevant results. Einstein Discovery stories are now models. Optimize your Einstein Bots conversations with new ways to work with Goals. Get to know your customers with Einstein Conversation Mining, which uses your existing conversation transcripts to identify the top reasons your customers contact you and recommend some for automation.

Salesforce Overall

Einstein Search

Get results geared toward how you work. With Search Manager, you configure your searchable fields, even picklists, to see information related to your work. You can also receive specific answers from a knowledge article to help answer your questions with Einstein Search Answers. With the help of our new Einstein Search Learning Map, you can quickly onboard to what Einstein Search has to offer.

Analytics

Einstein Discovery

Stories are now models. Get Einstein Discovery predictions and recommendations in Revenue Intelligence. Join the Decision Optimization pilot to improve recommendations. See the estimated run time of your models. Use custom text to make Einstein easier to understand.

Industries

Retail Banking and Wealth Management

Get more insightful customer churn predictions by using features created based on customers' responses to surveys and on the sentiment behind the responses.

AI Accelerator

Create use cases with AI Accelerator to get prediction scores in real time and related NBA recommendations. Customize the configuration of feature extractors to extract features in batches or in real time, or upload sample features.

Einstein Relationship Insights

Analyze Einstein's recommended relationships deeply and filter the types of relationships that you want to explore. Get updated when Einstein finds news and job change updates for the records that you follow. View relationship paths that show how you're connected with your prospects. Learn about the updated Einstein Relationship Insights experience. Explore relationships with person and company record objects, as active record objects are soon to be deprecated.

Intelligent Document Reader

Extract information from identity documents and experience the improved UI.

Intelligent Form Reader

Extract information from identity documents and experience the improved UI.

Sales

Einstein Conversation Insights

Einstein Conversation Insights now supports reporting on insights in voice and video calls. Sales managers can embed conversation measures into their Enablement programs. Some forms of personal information are masked from recordings.

Sales Cloud Einstein

Estimate the value your business will see from Einstein Forecasting with the updated Readiness Assessor.

Service

Einstein Classification

Add fields other than Subject and Description when training your Einstein classification model (Pilot), and include encrypted fields when you build your Case Classification model.

Einstein Bots

Manage bot goals and monitor performance all in one place with the new Goals page. Expand your enhanced bot portfolio with cloning and routing improvements, and build richer enhanced bot conversations with support for more structured content types. Quickly build bot dialogs and templates based on your conversation insights with smart integrations with the new Einstein Conversation Mining feature.

Einstein Conversation Mining (Beta)

Einstein Conversation Mining helps you identify key automation opportunities using your Service Cloud conversation data. Build reports in Einstein Conversation Mining and let Einstein identify the top reasons customers contact you, which are the best opportunities to automate. Create a bot or dialog using your report results directly in the Einstein Bot Builder.

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](#)

Accelerate users' proficiency at achieving revenue-impacting business results with more sophisticated enablement programs delivered to users in the flow of work in Salesforce. Add structure to your programs with sections and specific outcomes. Implement Einstein Conversation Insights for program outcomes and milestones to validate that your programs are changing how reps talk to customers. Create program resources more efficiently with new tools for creating measures, cloning existing programs and measures, and including text-based content. And be the maestro of a successful rollout with enhanced analytics.

[Guidance Center and In-App Guidance](#)

Explore new in-app guidance and guidance sets from Salesforce that highlight multiple clouds, products, and features.

[Enablement Sites \(myTrailhead\)](#)

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

Enablement

Accelerate users' proficiency at achieving revenue-impacting business results with more sophisticated enablement programs delivered to users in the flow of work in Salesforce. Add structure to your programs with sections and specific outcomes. Implement Einstein Conversation Insights for program outcomes and milestones to validate that your programs are changing how reps talk to customers. Create program resources more efficiently with new tools for creating measures, cloning existing programs and measures, and including text-based content. And be the maestro of a successful rollout with enhanced analytics.

IN THIS SECTION:

[Clarify and Formalize Enablement Goals with Distinct Program Outcomes](#)

Keep users focused on the most important goal of their program. When Enablement team members turn on the Outcome-Based Program option, users see the outcome at the top of their program and can stay focused on meeting that achievement. Plus, Enablement teams can monitor the efficacy of their programs by using Enablement analytics to track users' progress. Previously, outcomes were defined implicitly using a final milestone that occurred at the end of a program.

[Organize Your Programs with Sections](#)

Help users parse and comprehend the items in an Enablement program by providing more structure, grouping, and predictability to the program experience. Logically arrange milestones and exercises into smaller chunks, which users can expand or collapse in the Guidance Center. Enablement team members can group milestones and exercises based on their subject matter, area of expertise, due date, or anything at all. Plus, Enablement teams get section-specific analytics to compare how users are progressing section by section.

[Add Einstein Conversation Insights in Enablement Programs](#)

Make every conversation count and verify how your reps engage with customers when they're in the field. Enablement teams can coach employees on the KPIs related to voice and video calls that are most important to their company. Embed conversation milestones and outcomes directly into Enablement programs. Teams can measure progress by building custom Einstein Conversation Insights (ECI) measures. Or, teams can get started quickly using a new prebuilt measure.

[Get Step-By-Step Support When Building Enablement Measures](#)

Build measures as if your own enablement expert is helping you every step of the way. When Enablement team members create measures, the new Help with Measures panel provides practical prompts, real-world examples, and handy tips that come directly from our own experienced program builders.

[Show and Manage Text-Based Content in Enablement Programs More Easily](#)

Infuse your Enablement programs with native text-based content that users can view within their flow of work and that content creators can manage with a few clicks in Salesforce. In the Enablement workspace in the Digital Experiences app, the new Rich Text content type guides content creators to create text that follows research-backed guidelines for how users best consume and understand content. Help users plan ahead for their program experience by showing estimated reading times and providing summaries of key concepts in the text. In Program Builder, the new Lesson exercise type delivers rich text content in a program without requiring users to open another browser tab and follow a link.

[Create Enablement Programs and Measures More Efficiently](#)

Build programs faster and more easily. Enablement team members can spin off variations of their high-performing programs and measures quickly by cloning existing programs and measures. Cloned programs retain all outcomes, sections, milestones, and exercises from the original programs, along with the referenced content and measures. Cloned measures retain all details from the original measures.

[See Outcome and Milestone Progress Updates More Frequently](#)

Enablement users and Enablement teams alike get timely insight into program progress. Now outcome and milestone progress is assessed at 6:59 AM, 11:59 AM, 4:59 PM, and 11:59 pm, according to the time zone set in Salesforce. Users get the gratification of seeing their progress reflected more often from the program that they're taking in the Guidance Center. Enablement teams can see more timely progress updates on how users are doing from program analytics. Previously, milestones were assessed twice per day.

Analyze Outcome and Section Performance with Enablement Analytics

Account for the addition of outcomes and sections in Enablement programs in your analytics coverage. By default, viewing analytics for a program shows the latest dashboard and corresponding reports, which include data for sections and outcomes. But, Enablement teams can still retain any custom dashboards and reports that they built using the previous version of the default dashboard and reports.

Other Changes in Enablement

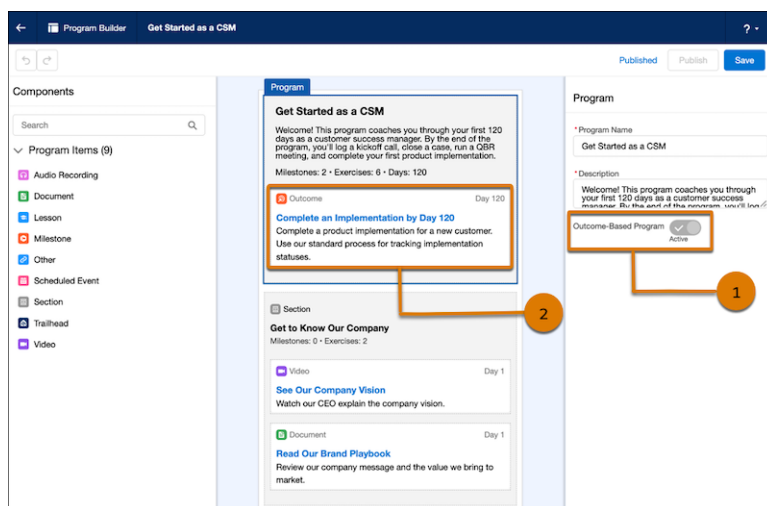
Salesforce admins, Enablement teams, and content creators benefit from other enhancements throughout the Enablement workflow.

Clarify and Formalize Enablement Goals with Distinct Program Outcomes

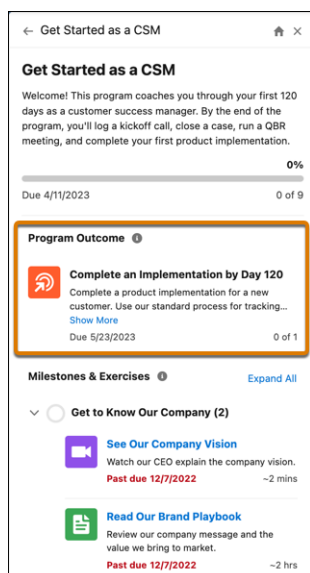
Keep users focused on the most important goal of their program. When Enablement team members turn on the Outcome-Based Program option, users see the outcome at the top of their program and can stay focused on meeting that achievement. Plus, Enablement teams can monitor the efficacy of their programs by using Enablement analytics to track users' progress. Previously, outcomes were defined implicitly using a final milestone that occurred at the end of a program.

Where: This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions with the Enablement add-on license.

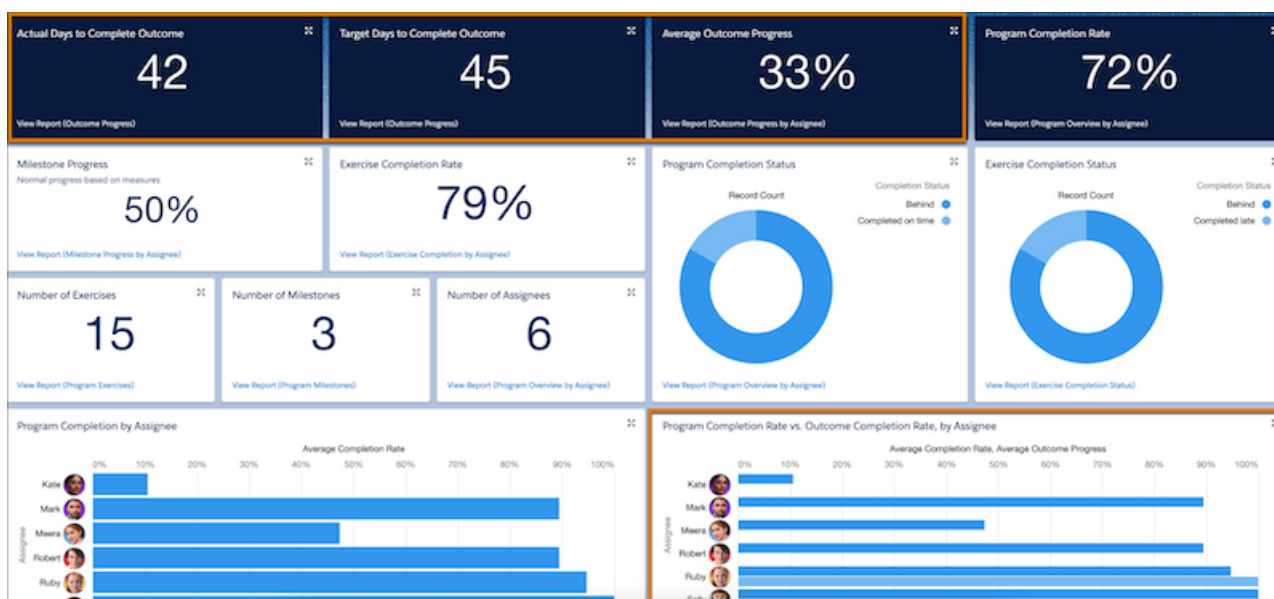
How: Enablement team members turn on the Outcome-Based Program option (1) when they're editing a program in the program builder. Then, team members enter outcome details and add the appropriate measure to track the user behavior or goal they want to follow (2).



Similar to milestones, the outcome title, description, due date, and progress are visible when assigned users take the program in the Guidance Center.



Later, Enablement teams can track outcomes as a standalone data point in the Enablement Dashboard and outcome-specific reports.



Enablement program templates now include outcomes, too. Previously, outcomes in templates were defined implicitly using a milestone that occurred at the end of a program. Programs created from templates before Spring '23 remain unchanged and retain a milestone component to represent the outcome.

SEE ALSO:

[Analyze Outcome and Section Performance with Enablement Analytics](#)

[Salesforce Help: Understanding Outcomes, Milestones, and Measures \(can be outdated or unavailable during release preview\)](#)

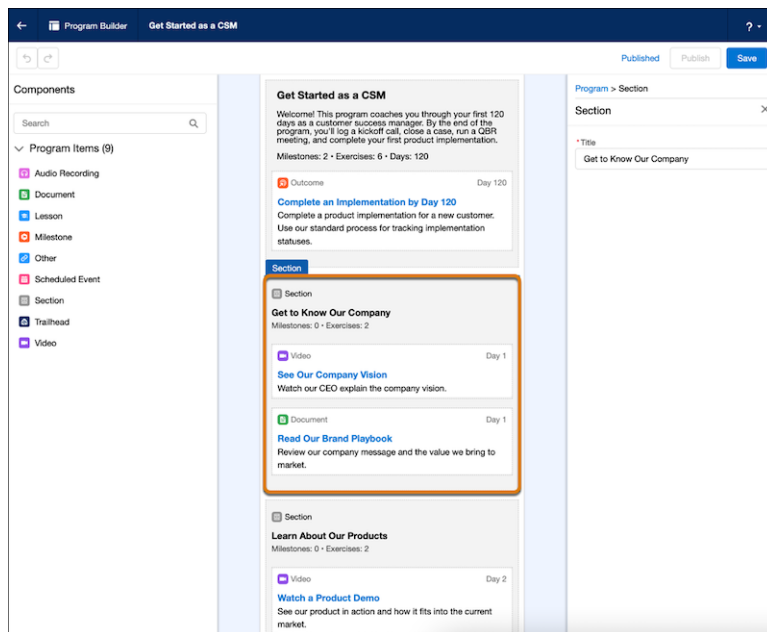
[Salesforce Help: Designing Enablement Programs \(can be outdated or unavailable during release preview\)](#)

Organize Your Programs with Sections

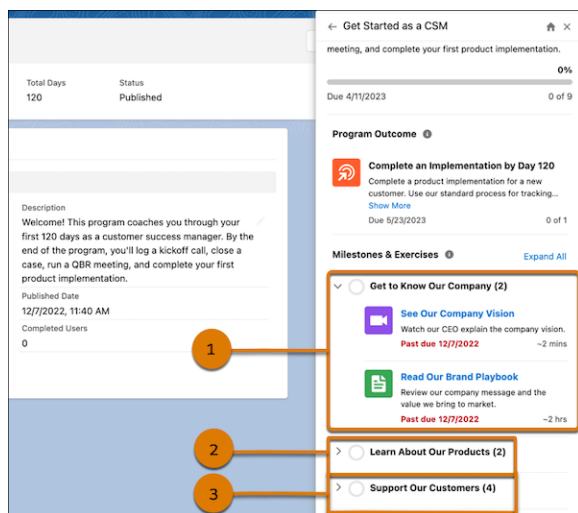
Help users parse and comprehend the items in an Enablement program by providing more structure, grouping, and predictability to the program experience. Logically arrange milestones and exercises into smaller chunks, which users can expand or collapse in the Guidance Center. Enablement team members can group milestones and exercises based on their subject matter, area of expertise, due date, or anything at all. Plus, Enablement teams get section-specific analytics to compare how users are progressing section by section.

Where: This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions with the Enablement add-on license.

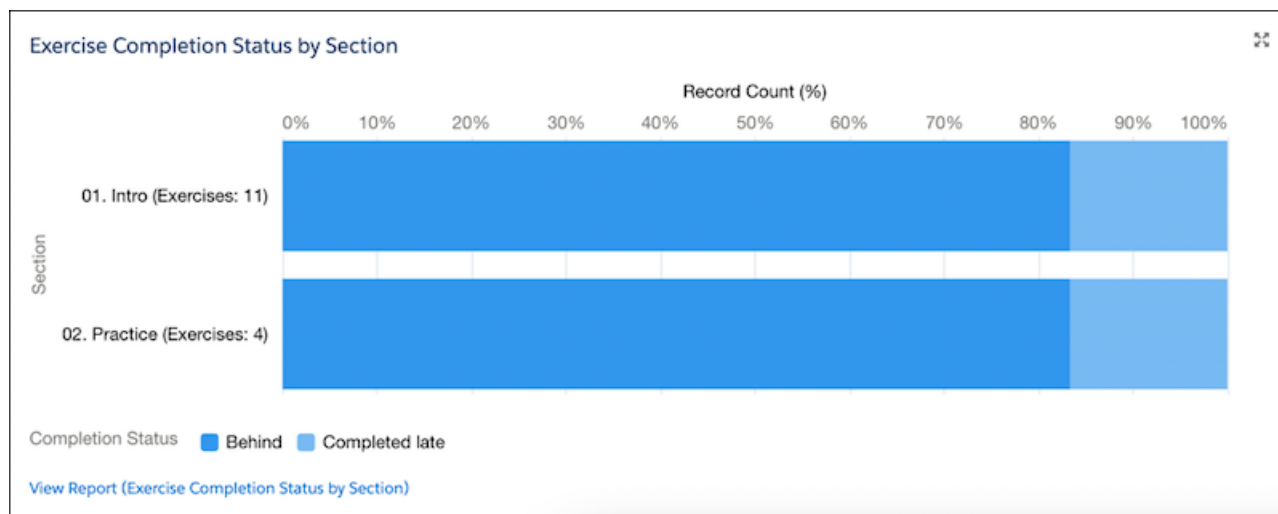
How: To add sections to a program, Enablement team members drag the section component onto the Program Builder canvas and then drag relevant exercises and milestones into the section.



When assigned users take a program in the Guidance Center, they can expand (1) or collapse (2, 3) each section to help them stay focused on one part of the program at a time.



Later, Enablement teams can review section-specific analytics in their Enablement Dashboard and the Exercise Completion Status by Section report.



SEE ALSO:

[Analyze Outcome and Section Performance with Enablement Analytics](#)

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

[Salesforce Help: Add and Organize Items in Enablement Programs \(can be outdated or unavailable during release preview\)](#)

Add Einstein Conversation Insights in Enablement Programs

Make every conversation count and verify how your reps engage with customers when they're in the field. Enablement teams can coach employees on the KPIs related to voice and video calls that are most important to their company. Embed conversation milestones and outcomes directly into Enablement programs. Teams can measure progress by building custom Einstein Conversation Insights (ECI) measures. Or, teams can get started quickly using a new prebuilt measure.

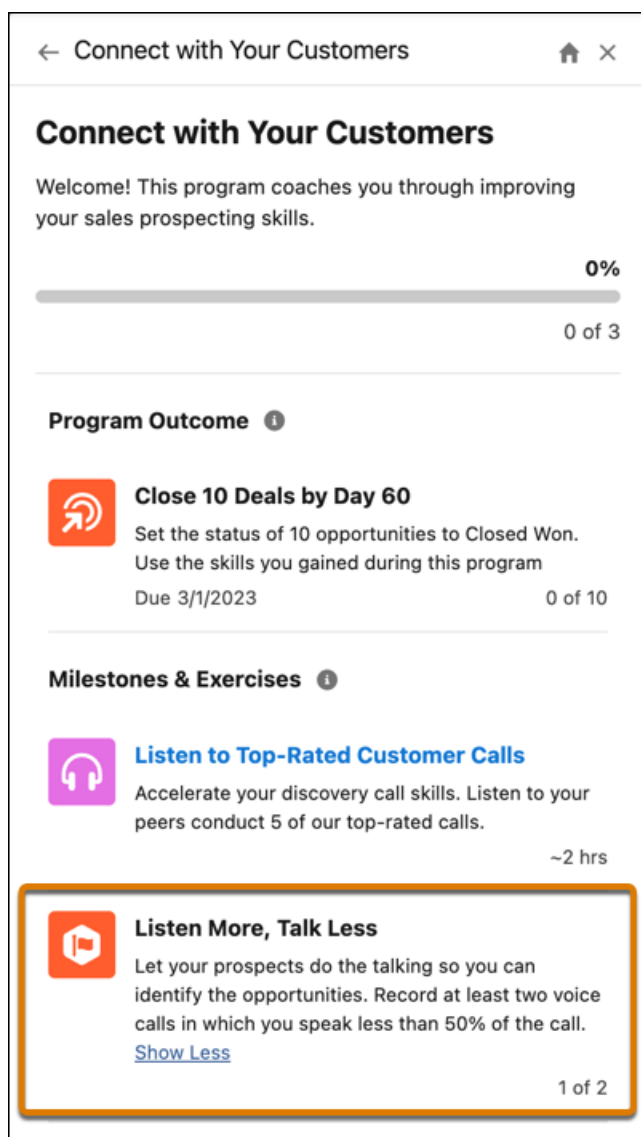
Where: This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions with the Enablement add-on license.

Who: This change applies to these users.

- To build ECI measures, users need the Manage All Enablement Features permission. To build measures for ECI video calls, users need the Conversation Insights for Sales or Conversation Insights for Service permission set.
- To achieve ECI-related outcomes or milestones in an assigned program, users need the Take Enablement Programs permission. Users also need the Conversation Insights for Sales or Conversation Insights for Service permission set.

How: Access ECI setup from the Enablement page in Setup. During setup, turn on Insight Reports and Conversation-related Measures for Enablement to make ECI objects available for use with Enablement. If you want to make the prebuilt ECI measure available for Enablement team members, return to the Enablement page in Setup and click **Create Enablement Measures**.

After you do, Enablement team members can create custom measures that follow users' ECI-recorded voice calls and video calls in Enablement programs. Or, Enablement team members can use the new prebuilt measure to create milestones and outcomes that require users to complete calls where they talk less than 50% of the time.



SEE ALSO:

[Salesforce Help: Set Up Conversation Outcomes and Milestones](#) (can be outdated or unavailable during release preview)

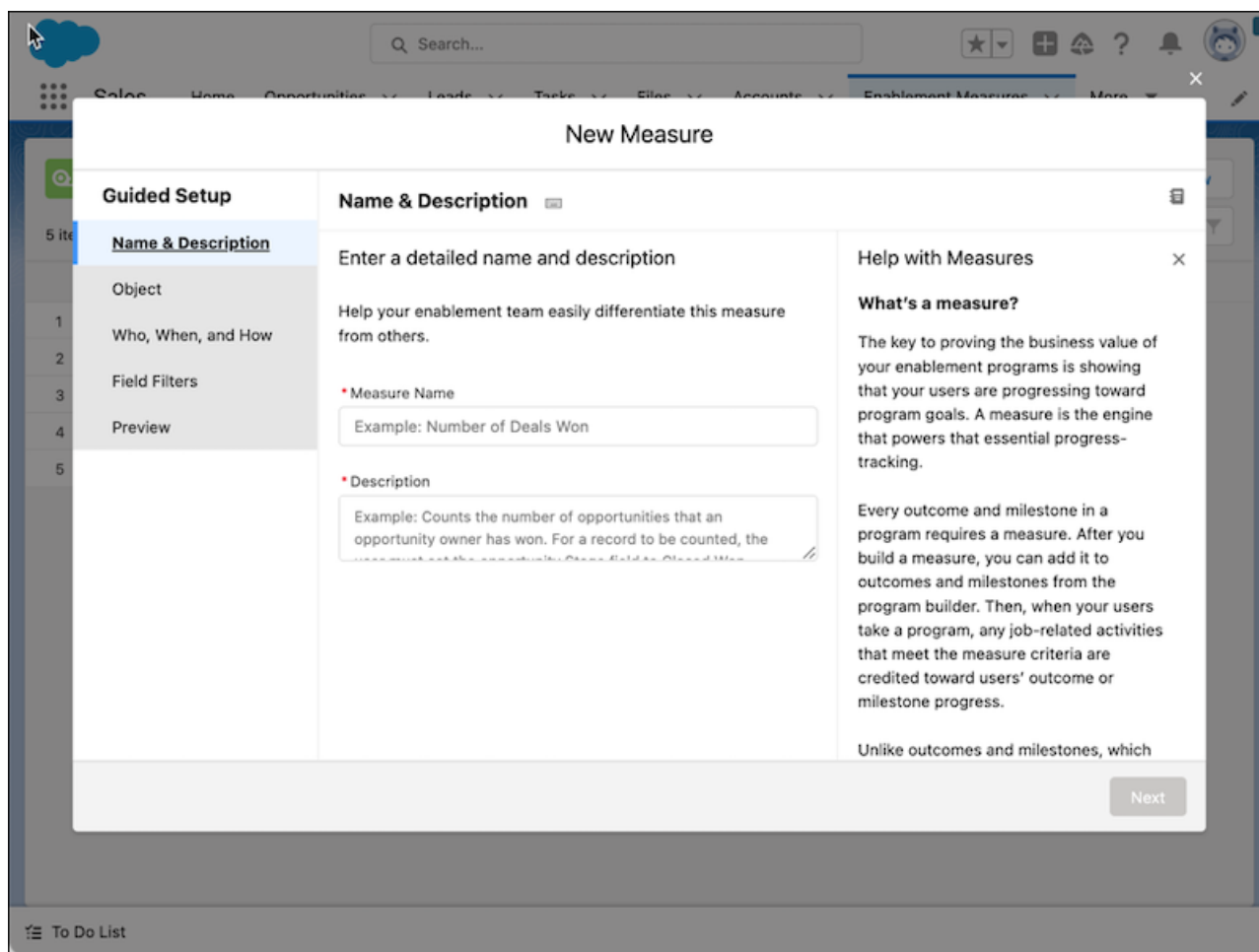
[Salesforce Help: Guidelines for Creating Measures Using Einstein Conversation Insights](#) (can be outdated or unavailable during release preview)

Get Step-By-Step Support When Building Enablement Measures

Build measures as if your own enablement expert is helping you every step of the way. When Enablement team members create measures, the new Help with Measures panel provides practical prompts, real-world examples, and handy tips that come directly from our own experienced program builders.

Where: This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions with the Enablement add-on license.

How: To build a measure, Enablement team members go to the Enablement Measures page and click **New**. As team members progress through building the measure, they see unique guidance for each field.



SEE ALSO:

[Salesforce Help: Understanding Outcomes, Milestones, and Measures \(can be outdated or unavailable during release preview\)](#)

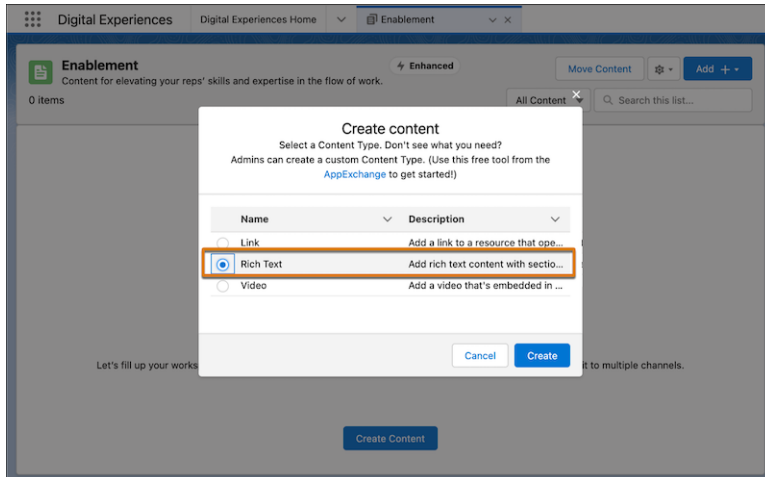
[Salesforce Help: Building Enablement Measures \(can be outdated or unavailable during release preview\)](#)

Show and Manage Text-Based Content in Enablement Programs More Easily

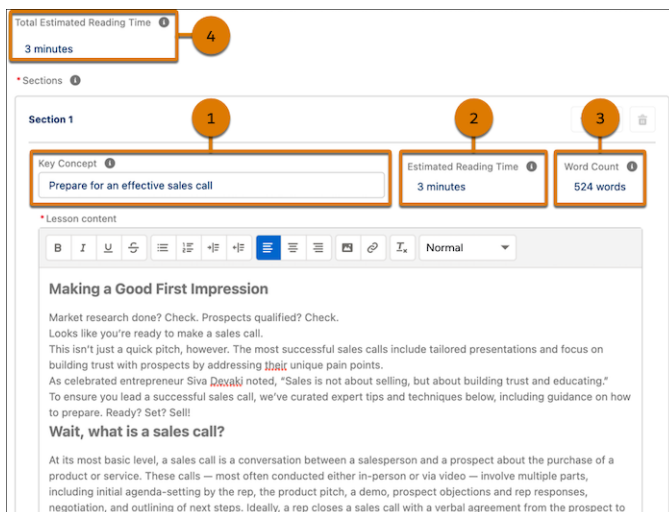
Infuse your Enablement programs with native text-based content that users can view within their flow of work and that content creators can manage with a few clicks in Salesforce. In the Enablement workspace in the Digital Experiences app, the new Rich Text content type guides content creators to create text that follows research-backed guidelines for how users best consume and understand content. Help users plan ahead for their program experience by showing estimated reading times and providing summaries of key concepts in the text. In Program Builder, the new Lesson exercise type delivers rich text content in a program without requiring users to open another browser tab and follow a link.

Where: This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions with the Enablement add-on license.

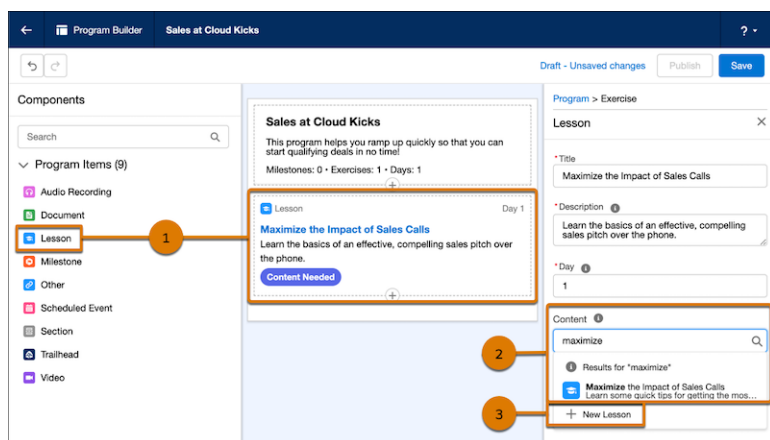
How: The Rich Text content type is available in the Create content window in the Enablement workspace in Digital Experiences.



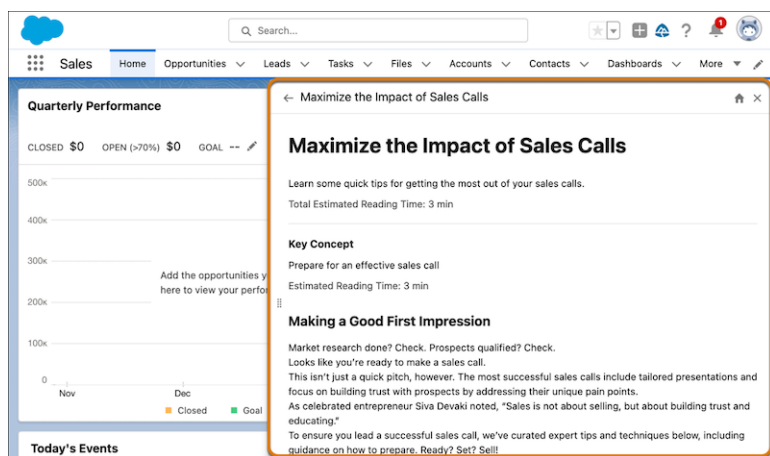
The Rich Text content editor prompts content creators to enter and format text, including links and images, and to break content into sections. For each section, content authors are prompted to summarize the text's key concept (1), and the editor shows an estimated average reading time (2) based on the section's word count (3). The total estimated reading time for all sections is also aggregated (4).



To reference a Rich Text content record in a program, add a Lesson exercise type in Program Builder (1), and then search for an existing record (2). Or use the shortcut (3) to create a Rich Text content record directly from Program Builder.



When a user takes an assigned program that includes a Lesson, the text content displays directly in the Guidance Center, including the key concepts and estimated reading times.



SEE ALSO:

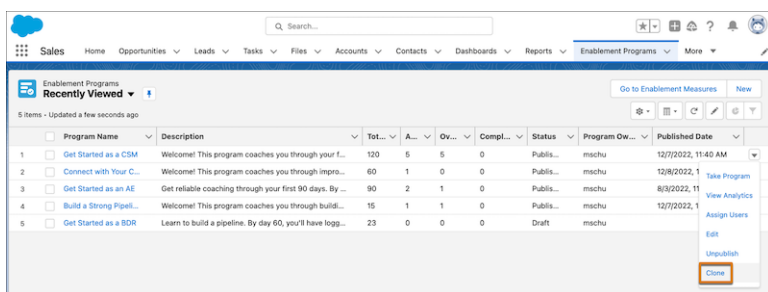
[Salesforce Help: Create Rich Text for an Exercise from Digital Experiences \(can be outdated or unavailable during release preview\)](#)

Create Enablement Programs and Measures More Efficiently

Build programs faster and more easily. Enablement team members can spin off variations of their high-performing programs and measures quickly by cloning existing programs and measures. Cloned programs retain all outcomes, sections, milestones, and exercises from the original programs, along with the referenced content and measures. Cloned measures retain all details from the original measures.

Where: This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions with the Enablement add-on license.

How: On the Enablement Programs or Enablement Measures object pages, click the dropdown on a program or measure and select **Clone**.



SEE ALSO:

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

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

See Outcome and Milestone Progress Updates More Frequently

Enablement users and Enablement teams alike get timely insight into program progress. Now outcome and milestone progress is assessed at 6:59 AM, 11:59 AM, 4:59 PM, and 11:59 pm, according to the time zone set in Salesforce. Users get the gratification of seeing their progress reflected more often from the program that they're taking in the Guidance Center. Enablement teams can see more timely progress updates on how users are doing from program analytics. Previously, milestones were assessed twice per day.

Where: This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions with the Enablement add-on license.

SEE ALSO:

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

[Salesforce Help: Analytics for Enablement Programs \(can be outdated or unavailable during release preview\)](#)

Analyze Outcome and Section Performance with Enablement Analytics

Account for the addition of outcomes and sections in Enablement programs in your analytics coverage. By default, viewing analytics for a program shows the latest dashboard and corresponding reports, which include data for sections and outcomes. But, Enablement teams can still retain any custom dashboards and reports that they built using the previous version of the default dashboard and reports.

Where: This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions with the Enablement add-on license.

Why: These new folders were created to avoid overwriting data.

- Enablement Dashboard Spring '23
- Enablement Dashboard Reports Spring '23

The new Enablement Dashboard is available in the Enablement Dashboard Reports Spring '23 folder.

These new standard reports are available in the Enablement Dashboard Reports Spring '23 folder.

- Outcome Progress
- Outcome Progress by Assignee
- Exercise Completion Status by Section
- Program Exercises
- Program Milestones

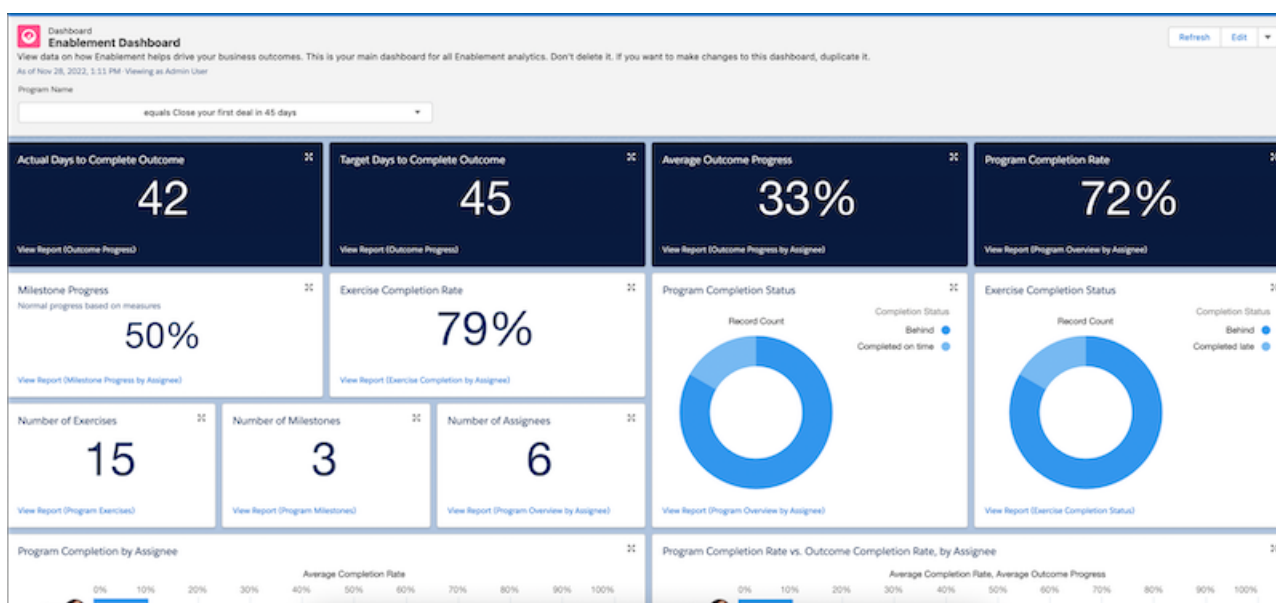
These new custom report types are available.

- Program Definition
- Program Task Progress

These new widgets are available in the Spring '23 Enablement Dashboard.

- Actual Days to Complete Outcome
- Target Days to Complete Outcome
- Average Outcome Progress
- Number of Exercises
- Number of Milestones

How: In the Enablement Programs home page, click **View Analytics** for the latest version of the Enablement Dashboard. To see the previous version, under Dashboard, locate the Enablement Dashboard Winter '23 folder, or under Reports, locate the Enablement Dashboard Reports Winter '23.



SEE ALSO:

[Clarify and Formalize Enablement Goals with Distinct Program Outcomes](#)

[Organize Your Programs with Sections](#)

[Salesforce Help: Tracking and Analyzing Enablement Programs](#)

Other Changes in Enablement

Salesforce admins, Enablement teams, and content creators benefit from other enhancements throughout the Enablement workflow.

Where: This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions with the Enablement add-on license.

How: Salesforce admins can customize the layout of the Enablement Programs record details page from Object Manager.

Enablement teams have more flexibility with fields to create narrower measures. When adding filters for picklist fields, you can filter by multiple picklist values. Plus, the Display Field supports object ID fields and fields that use combo boxes.

Content creators can use these CMS features in the Enablement workspace in the Digital Experiences app.

- Use collections to organize and publish multiple links, videos, or rich text records at one time. But in a program, each exercise can still reference only one published link, video, or rich text record.
- See version history on the detail page of any link, video, rich text, or image referenced in rich text. You can edit published content to create the next version, and you can revert published content to a previously published version. When you publish a new version of content referenced by an exercise in a published program, the program shows the new version automatically. Assigned users receive your updated content right away.
- Assign the Content Author contributor role in addition to other contributor roles in the workspace. Users who are assigned this role can create and save records in the Enablement workspace, but can't publish records for use in programs. Because programs can reference only published content, we recommend that Salesforce admins assign the Content Manager contributor role instead.

SEE ALSO:

- [Trailhead: Customize Record Details with Page Layouts \(can be outdated or unavailable during release preview\)](#)
- [Salesforce Help: Building Enablement Measures \(can be outdated or unavailable during release preview\)](#)
- [Salesforce Help: Guidelines for Digital Experiences Content in Enablement Programs \(can be outdated or unavailable during release preview\)](#)

Guidance Center and In-App Guidance

Explore new in-app guidance and guidance sets from Salesforce that highlight multiple clouds, products, and features.

IN THIS SECTION:

- [Get the Latest In-App Content](#)
Stay up to date on new in-app prompts, welcome mats, and popovers. Review Salesforce content and minimize duplication as you create in-app content.
- [Discover More Guidance Sets for Admins](#)
Access new personalized setup and learning resources that align with your experience level and a specific business journey. Guidance sets include suggested resources. Guidance sets aren't available in sandboxes.

Get the Latest In-App Content

Stay up to date on new in-app prompts, welcome mats, and popovers. 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.

Docked prompt	Introduce Collaborative Forecasts and show how to turn it on.
Floating prompt	Use the Gender Identity and Pronouns fields to capture more inclusive customer data.
Floating prompt	Empower sales teams to close deals faster than ever.
Floating prompt	Offer incentives to Manufacturing Cloud partners when they meet targets.

Floating prompt	Enable Virtual Remote Assistant to deliver seamless service from anywhere and solve customer problems virtually.
Floating prompt	Highlight the Broadcast Communications related list on Incidents for Customer Service Incident Management users.
Floating prompt	Direct customers whose orgs are eligible to upgrade to Hyperforce to use the Hyperforce Assistant.
Floating prompt	Improve the customer service experience from the appointment to mobile worker's arrival.
Walkthrough	Indicate best practices for completing Lightning Sync migration and introduce Einstein Activity Capture setup.

How: To turn off content that isn't applicable to your users, from the In-App Guidance Setup page, click **Settings**, and then deselect **Salesforce Standard In-App Guidance**. Users sometimes still see Salesforce authored in-app guidance in guidance sets or from the direct link.

Discover More Guidance Sets for Admins

Access new personalized setup and learning resources that align with your experience level and a specific business journey. Guidance sets include suggested resources. Guidance sets aren't available in sandboxes.

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.

How: To access the Guidance Center anywhere, anytime, click 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, from Guidance Center Home, select **View More**.

Enablement Sites (myTrailhead)

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

IN THIS SECTION:

[Export All Enablement Site Content with a Few Clicks](#)

Back up the trails and modules on your enablement site more easily, and preserve all the hard work that went into developing your company's enablement experience. Download backpacks of all the content that's been published or archived on your enablement site with one click instead of downloading each backpack individually.

Export All Enablement Site Content with a Few Clicks

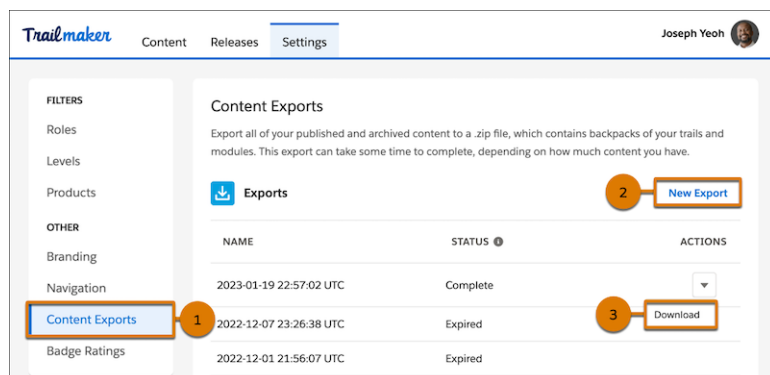
Back up the trails and modules on your enablement site more easily, and preserve all the hard work that went into developing your company's enablement experience. Download backpacks of all the content that's been published or archived on your enablement site with one click instead of downloading each backpack individually.

Where: This change applies to enablement sites (myTrailhead), which are available for Enterprise, Performance, and Unlimited editions.

When: This enhancement is available in January 2023.

Who: This enhancement is available for users with the Manage Site Settings permission.

How: The Trailmaker Settings app on your enablement site includes a new Content Exports tab (1). Click **New Export** (2). After the export is complete, select **Download** from the Actions column (3).



Depending on how much content is published or archived on your enablement site, the export process can take some time to finish. Exports remain available to download for 30 days. You can begin a new export process every seven days.

The export format is a .zip file that contains the backpacks of all your content, including any translations for other supported languages, applied filters, and translated filter values. You can store these backpacks in a version control system or reimport the backpacks individually into Trailmaker Content later. You can also use the backpacks to transfer content to other systems.

SEE ALSO:

[Salesforce Help: Export All Published and Archived Content from an Enablement Site](#)

[Salesforce Help: Backpacks for Trails and Modules](#)

Experience Cloud

Boost SEO for your Aura and Lightning Web Runtime sites with structured data. A wealth of new and updated components in Experience Builder help you make visits to your LWR sites even more enjoyable for your users. Adjust the margin around individual components on enhanced LWR sites for pixel-perfect pages. On your enhanced Mobile Publisher for Experience Cloud apps, delight your users with string properties that respond to their device screen size.

IN THIS SECTION:

[Aura and LWR Sites](#)

Add structured data to your Aura and LWR sites and improve their SEO. CMS content published from enhanced workspaces is searchable on microsites. Cases, accounts, and other CRM records are searchable on sites created with the Build Your Own (LWR) and Microsite templates.

[Components in Experience Builder](#)

New components for LWR sites let your visitors contact support right from your site and catch up on notifications, and let you display a custom set of actions. You can add pagination to the Grid component, and add alt text to images in the Rich Content Editor component. Components in enhanced LWR sites have a new Spacing tab where you can refine the component's padding or margin.

[Developer Productivity](#)

Migrate your Aura sites to Google Analytics 4 and update your tracking IDs. In LWR sites, participate in the developer preview for creating custom property editors and property types for your custom components. With the help of clearer error messages, troubleshoot your ExperienceBundle deployment.

Site Performance

Get improved performance with micro-batching. Let guest users create cases more efficiently with the Contact Support Form component, receive notifications about micro-batching errors, and test the `CreateRecordsAsync` Apex method with micro-batching. Our Customer Identity experience is also getting an upgrade with new headless login and forgot password flows.

Mobile for Experience Cloud

On enhanced LWR sites, string properties in custom Lightning web components respond to screen size. You can also use Experience Builder to set up the bottom navigation bar for your Mobile Publisher for Experience Cloud app.

Security and Sharing

Release updates improve site security and upgrade the Salesforce SAML framework. The user management setting for Hide Personal Information is retired. For API calls in a site with nicknames enabled, the Hide first and last name fields in SOAP API is deprecated.

Aura and LWR Sites

Add structured data to your Aura and LWR sites and improve their SEO. CMS content published from enhanced workspaces is searchable on microsites. Cases, accounts, and other CRM records are searchable on sites created with the Build Your Own (LWR) and Microsite templates.

IN THIS SECTION:

Improve Your Site SEO with Structured Data

Now you can use the `<script>` tag to add structured data to individual site pages. Structured data provides key page details in a standardized format that helps search engines understand the content and meaning of a web page. With better comprehension of your site's content, search engines display your pages in more engaging ways, which can drive higher traffic to your site. You can add structured data to your pages from the Head Tags section of a page's Properties tab in Experience Builder or with ExperienceBundle and DigitalExperienceBundle Metadata API types.

Search for CMS Content in Your Enhanced LWR Microsites

Site visitors can now search your Microsite for CMS content published from enhanced CMS workspaces. Visitors can also search for content within the Rich Content Editor and HTML Editor components, and within page title metadata. Previously, CMS content searches were supported only in enhanced sites created with the Build Your Own (LWR) template.

Search for CRM Records in Your LWR Sites (Beta)

Your site visitors can now search for CRM records, such as cases, accounts, leads, and opportunities, in sites created with the Build Your Own (LWR) and Microsite (LWR) templates. Visitors can filter and sort the search results, making it easier to find what they need. And because you can configure the images and labels on your search page, you can customize the page to complement your company's branding.

Improve Your Site SEO with Structured Data

Now you can use the `<script>` tag to add structured data to individual site pages. Structured data provides key page details in a standardized format that helps search engines understand the content and meaning of a web page. With better comprehension of your site's content, search engines display your pages in more engaging ways, which can drive higher traffic to your site. You can add structured data to your pages from the Head Tags section of a page's Properties tab in Experience Builder or with ExperienceBundle and DigitalExperienceBundle Metadata API types.

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:

[Salesforce Help: SEO Page Properties in Experience Builder](#) (can be outdated or unavailable during release preview)

[Metadata API Developer Guide: ExperienceBundle](#) (can be outdated or unavailable during release preview)

[Metadata API Developer Guide: DigitalExperienceBundle](#) (can be outdated or unavailable during release preview)

Search for CMS Content in Your Enhanced LWR Microsites

Site visitors can now search your Microsite for CMS content published from enhanced CMS workspaces. Visitors can also search for content within the Rich Content Editor and HTML Editor components, and within page title metadata. Previously, CMS content searches were supported only in enhanced sites created with the Build Your Own (LWR) template.

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

SEE ALSO:

[Salesforce Help: Set Up CMS Content Search in an LWR Site](#) (can be outdated or unavailable during release preview)

Search for CRM Records in Your LWR Sites (Beta)

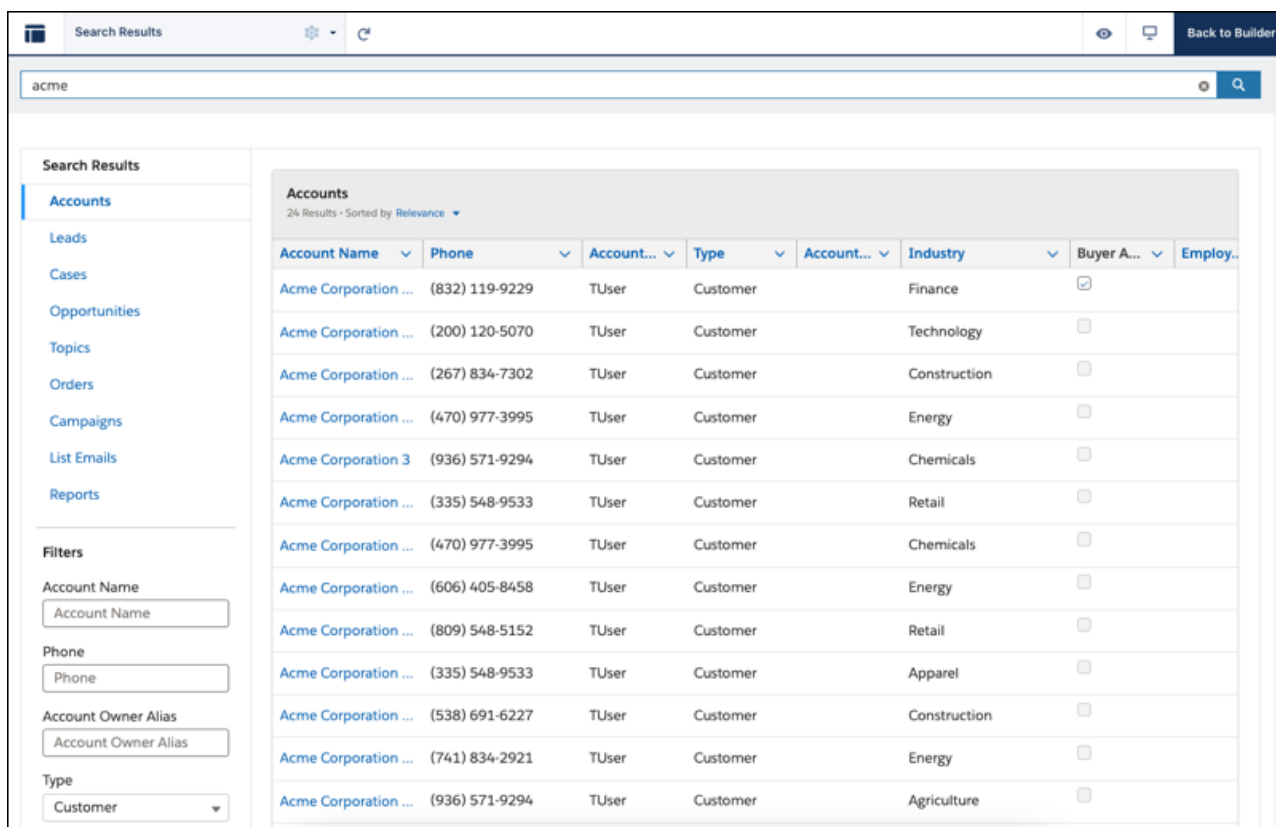
Your site visitors can now search for CRM records, such as cases, accounts, leads, and opportunities, in sites created with the Build Your Own (LWR) and Microsite (LWR) templates. Visitors can filter and sort the search results, making it easier to find what they need. And because you can configure the images and labels on your search page, you can customize the page to complement your company's branding.

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 see CRM Search in action, set up a standard search page, and add the Results Layout component to it. From the Results Source field, select **CRM**, and then choose which objects to include in search. After you publish the changes to your site, your visitors can search for CRM content.



Before you use CRM Search, review these limitations.

- Site visitors can search for any object supported by UI API, except Files and Knowledge objects.
- Sorting isn't supported on mobile devices.
- Filtering isn't supported for all data types.
- For certain objects, such as accounts, cases, contacts, and leads, the search results page displays empty values instead of email addresses. To avoid showing columns with empty data, remove all email fields from the search layout.
- For cases, the hover functionality for the Subject field doesn't work. In Experience Builder's preview mode, an error message appears instead of the expected window with record information. On your live site, no preview appears.

SEE ALSO:

[Salesforce Help: Set Up CRM Search in LWR Sites \(Beta\) \(can be outdated or unavailable during release preview\)](#)

Components in Experience Builder

New components for LWR sites let your visitors contact support right from your site and catch up on notifications, and let you display a custom set of actions. You can add pagination to the Grid component, and add alt text to images in the Rich Content Editor component. Components in enhanced LWR sites have a new Spacing tab where you can refine the component's padding or margin.

IN THIS SECTION:

[Open Support Cases with the Contact Support Form Component in LWR Sites](#)

Use the Contact Support Form in your LWR sites to let users efficiently create cases and easily contact support. The form's preconfigured fields reduce your cost-to-serve by streamlining the collection of information about the user's request. The form contains several custom fields that you can configure to your company's preferences.

[Use Micro-Batching to Process Guest Cases from the Contact Support Form](#)

Guest users can now create cases via the Contact Support Form component using micro-batching. To support high-volume case creation, cases are processed in batches rather than one at a time. Previously, only authenticated users could process records submitted with the Contact Support Form component using micro-batching.

[Create Component Visibility Rules in Enhanced LWR Sites \(Pilot\)](#)

Make your enhanced LWR sites as dynamic as your users. With Expression Based Visibility, you can hide or show individual components based on the conditions you choose. From the new Visibility tab on your components, create rules and apply them based User object fields, such as User > Manager > Department.

[Boost the Accessibility of Images in the Rich Content Editor Component](#)

When you use the Rich Content Editor component to add an image to your site, you can enter descriptive alt text for the image right from the component. Screen readers can read the alt text aloud so that your low-vision site visitors know what the image shows. Previously, you could include alt text only for images added with the Image component.

[Add Next and Previous Buttons to the Grid Component](#)

When you select the **Show pagination** option on the Grid component, you now have two options to allow users to scroll through content. In addition to the **Show More** button, you can now use the **Next** and **Previous** buttons on your site. Change the button labels, alignment, and size to fit your site's needs.

[Adjust the Margin Around Individual Components in Enhanced LWR Sites](#)

To refine the appearance of your enhanced LWR site, use the Margin field to adjust the spacing around any standard or custom component. Some standard and all custom components also have a field to control padding. These fields appear on the new Spacing tab in the property panel for each component. Existing property fields appear on the new Settings tab.

[Create an Actions Bar in LWR Sites \(Beta\)](#)

Give your users access to their most important actions in one convenient bar. Use the Actions Bar component to display a custom set of actions on your object detail pages in LWR sites, and then customize the bar to match your branding.

[View and Edit Records Using the Record Detail Component in LWR Sites \(Beta\)](#)

Customers and partners can view and edit Salesforce records in your Lightning Web Runtime (LWR) site with the Record Detail component. For example, partners can update opportunity records, and customers can access their account information. In the component, users see the page layout that's assigned to their profile. The component inherits the formatting, such as font and color, from the branding settings of your site.

Open Support Cases with the Contact Support Form Component in LWR Sites

Use the Contact Support Form in your LWR sites to let users efficiently create cases and easily contact support. The form's preconfigured fields reduce your cost-to-serve by streamlining the collection of information about the user's request. The form contains several custom fields that you can configure to your company's preferences.

Where: This change applies to [LWR sites](#) accessed through Lightning Experience and Salesforce Classic in Enterprise and Unlimited editions.

Why: Previously, you could use the Contact Support Form component only for [Aura](#) sites.

Use Micro-Batching to Process Guest Cases from the Contact Support Form

Guest users can now create cases via the Contact Support Form component using micro-batching. To support high-volume case creation, cases are processed in batches rather than one at a time. Previously, only authenticated users could process records submitted with the Contact Support Form component using micro-batching.

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

How: In the Site Performance section of the Contact Support Form component settings, select the **Create cases in batches** checkbox.

Create Component Visibility Rules in Enhanced LWR Sites (Pilot)

Make your enhanced LWR sites as dynamic as your users. With Expression Based Visibility, you can hide or show individual components based on the conditions you choose. From the new Visibility tab on your components, create rules and apply them based User object fields, such as User > Manager > Department.

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



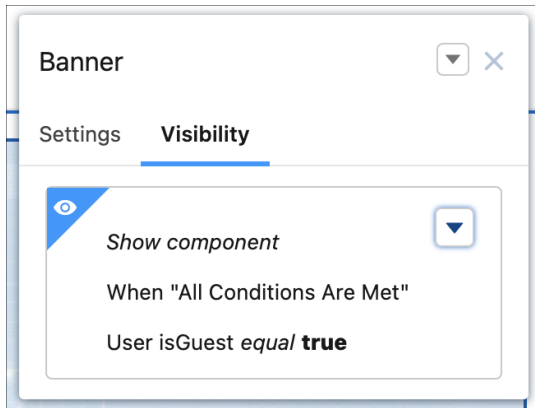
Note: This feature is not generally available and is being piloted with certain Customers subject to additional terms and conditions. It is not part of your purchased Services. This feature is subject to change, may be discontinued with no notice at any time in SFDC's sole discretion, and SFDC may never 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: Create conditions using AND/OR logic and show your components at just the right time to the right people.

Dialog box titled "Edit visibility rule for Banner".

Fields and options:

- Component state:** Hide (dropdown)
- When:** All Conditions Are Met (dropdown)
- Resource:** User > isGuest (text input with search icon)
- Operator:** Equal (dropdown)
- Value:** True (dropdown)
- Buttons:** Add Condition, Cancel, Save



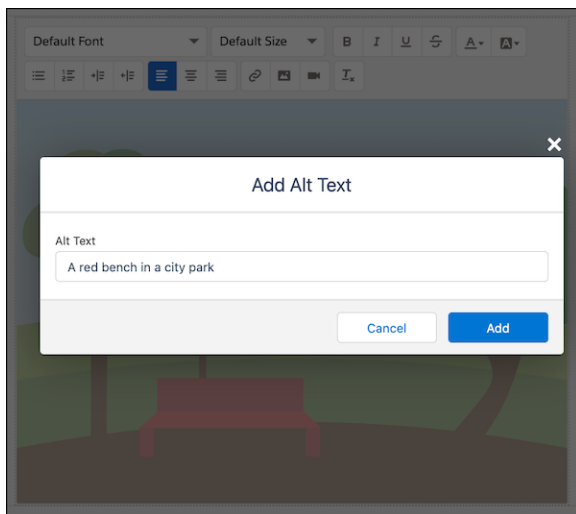
How: To participate in the Expression Based Visibility pilot, contact your Salesforce support representative and ask how you can join. After the feature is turned on, the Visibility tab appears on all components.

Boost the Accessibility of Images in the Rich Content Editor Component

When you use the Rich Content Editor component to add an image to your site, you can enter descriptive alt text for the image right from the component. Screen readers can read the alt text aloud so that your low-vision site visitors know what the image shows. Previously, you could include alt text only for images added with the Image component.

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

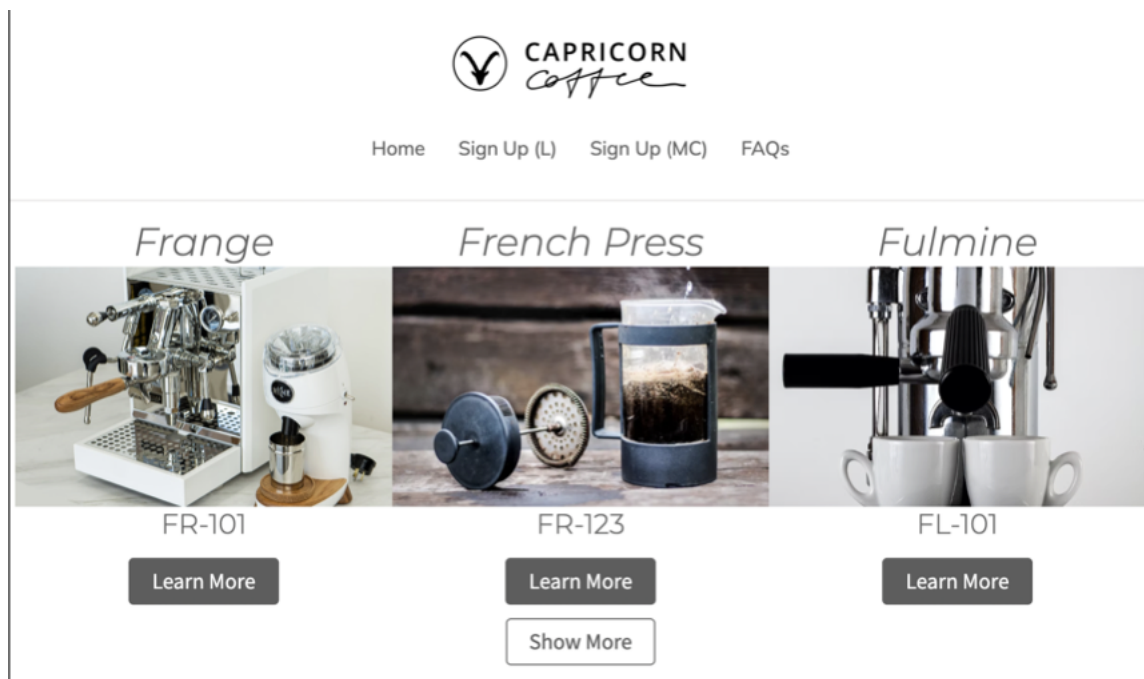
How: Make sure that the Rich Content Editor component is in edit mode. Then right-click the image, select **Add Alt Text**, enter your text, and click **Add**. To make the alt text available to your site visitors, publish the site.



Add Next and Previous Buttons to the Grid Component

When you select the **Show pagination** option on the Grid component, you now have two options to allow users to scroll through content. In addition to the **Show More** button, you can now use the **Next** and **Previous** buttons on your site. Change the button labels, alignment, and size to fit your site's needs.

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



Adjust the Margin Around Individual Components in Enhanced LWR Sites

To refine the appearance of your enhanced LWR site, use the Margin field to adjust the spacing around any standard or custom component. Some standard and all custom components also have a field to control padding. These fields appear on the new Spacing tab in the property panel for each component. Existing property fields appear on the new Settings tab.

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

How: Set a precise spacing value for each side of a component, or select one value to apply to all sides. To specify the margin or padding values, use pixels for fixed values, or percentage or rem units, which adapt to different screen sizes. Margin controls the space around the outside of a component's outer edges. Padding controls the space between a component's outer edges and its inner content.

Columns

Settings **Spacing**

Margin

Unit: rem

Top: 3 Right: 3 Bottom: 3 Left: 3

☒ Make all values equal

Padding

Unit: rem

Top: 10 Right: 5 Bottom: 10 Left: 5

☐ Make all values equal

Create an Actions Bar in LWR Sites (Beta)

Give your users access to their most important actions in one convenient bar. Use the Actions Bar component to display a custom set of actions on your object detail pages in LWR sites, and then customize the bar to match your branding.

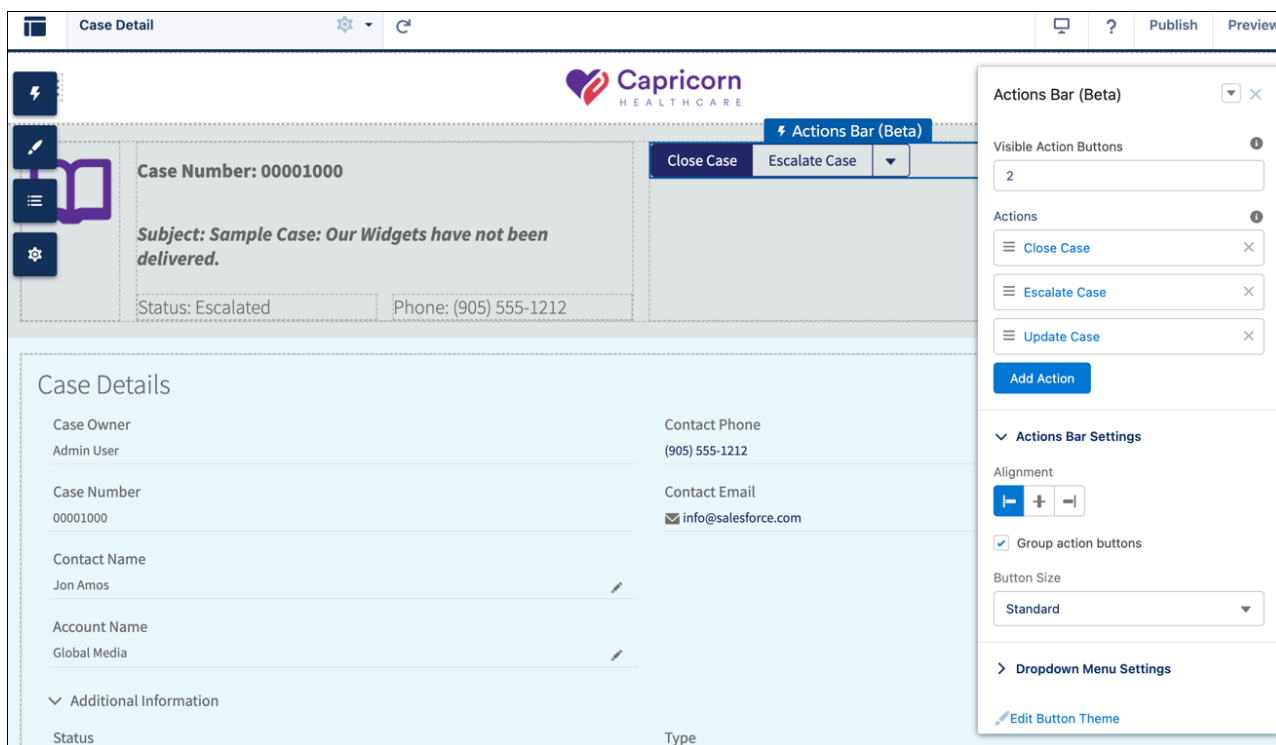
Where: This change applies to [LWR sites](#) accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions. You must have at least [one active community license](#) in your org to use this feature.



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: The Actions Bar component is available by default for Account, Case, Contact, Lead, Opportunity, Product, and custom object detail pages. To see the component on other object detail pages, go to **Experience Builder > Settings > Advanced** and select **Show all components**.

To add actions to your Actions Bar, first create Lightning web component quick actions. Then, in your LWR site, drag the Actions Bar component anywhere on an object detail page and add your actions to the bar. Currently, only headless Lightning web component quick actions are supported.



View and Edit Records Using the Record Detail Component in LWR Sites (Beta)

Customers and partners can view and edit Salesforce records in your Lightning Web Runtime (LWR) site with the Record Detail component. For example, partners can update opportunity records, and customers can access their account information. In the component, users see the page layout that's assigned to their profile. The component inherits the formatting, such as font and color, from the branding settings of your site.

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.



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: The Record Detail component is available for Account, Case, Contact, Lead, Opportunity, Product, and custom object pages. Open the object detail page, and drag the component to the page from the Records section of the component palette.

SEE ALSO:

[Salesforce Help: Standard Components for Use in the Build Your Own \(LWR\) Template \(can be outdated or unavailable during release preview\)](#)

Developer Productivity

Migrate your Aura sites to Google Analytics 4 and update your tracking IDs. In LWR sites, participate in the developer preview for creating custom property editors and property types for your custom components. With the help of clearer error messages, troubleshoot your ExperienceBundle deployment.

IN THIS SECTION:

[Migrate Aura Sites to Google Analytics 4 \(Release Update\)](#)

This update upgrades the JavaScript library for all your Aura sites from analytics.js to gtag.js in preparation for Google Analytics 4 (GA4). After you upgrade your JavaScript libraries, to complete the migration to GA4, manually update the Google Analytics Tracking ID for each Aura site from a UA-ID to a G-ID. To continue collecting analytics data for Aura sites after Google stops processing data through Universal Analytics properties on July 1, 2023, Experience Cloud requires that each Aura site uses the gtag.js library and a G-ID. Previously, Aura sites were permitted to use either the analytics.js library or the gtag.js library, and used a UA-ID to connect to Google Analytics. This update is first available in Spring '23.

[Level Up Your Site Deployments with New Metadata Types \(Generally Available\)](#)

Use the new Metadata API `DigitalExperienceBundle` and `DigitalExperienceConfig` types to programmatically deploy enhanced LWR sites. Formerly beta, both types are now generally available and exposed to SFDX CLI source control commands. Source tracking is enabled and makes it possible to automatically track changes and see all updated and deleted contents of your 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.

[Create Custom Property Editors and Property Types for Lightning Web Components in LWR Sites \(Developer Preview\)](#)

Make component configuration more intuitive at design time for your site builders—add custom property editors and property types to your custom Lightning web components. For example, give your site builders buttons instead of a text-input field to determine the size of an element. On custom property types, you can define validation rules for your custom editors, such as a minimum and maximum for a number field. Without custom property editors, the user interface in a custom Lightning web component is limited to text boxes, dropdown menus, and a few other kinds of fields.

[Troubleshoot Deployment Errors More Easily](#)

To help you identify issues when deploying a site using `ExperienceBundle`, we continue to add clearer explanations in deployment error messages. If you encounter a problem, the error message includes details on the location of the issue and the steps that you can take to resolve it.

Migrate Aura Sites to Google Analytics 4 (Release Update)

This update upgrades the JavaScript library for all your Aura sites from analytics.js to gtag.js in preparation for Google Analytics 4 (GA4). After you upgrade your JavaScript libraries, to complete the migration to GA4, manually update the Google Analytics Tracking ID for each Aura site from a UA-ID to a G-ID. To continue collecting analytics data for Aura sites after Google stops processing data through Universal Analytics properties on July 1, 2023, Experience Cloud requires that each Aura site uses the gtag.js library and a G-ID. Previously, Aura sites were permitted to use either the analytics.js library or the gtag.js library, and used a UA-ID to connect to Google Analytics. This update is first available in Spring '23.

Where: This change applies to [Aura sites](#) accessed through 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: After you apply this update, all your Aura sites use the gtag.js library. If your Aura sites already use the gtag.js library, this update has no impact. After you manually update each Google Analytics Tracking ID from a UA-ID to a G-ID, your Aura sites use GA4 to process site analytics data.

If any of your Aura sites use the analytics.js library, review the impact of the library upgrade on each of those sites in a developer or sandbox org before you apply the update in your production org. When you apply the update, all of your Aura site libraries are upgraded simultaneously. The upgrade to gtag.js libraries can't be undone.

To view this update, from Setup, in the Quick Find box, enter *Release Updates*, and then select **Release Updates**. For Migrate Aura Sites to Google Analytics 4, follow the testing and activation steps.

SEE ALSO:

[Knowledge Article: Migrate Experience Cloud Aura Sites to Google Analytics 4](#)

[External Link: Universal Analytics Will Be Going Away](#)

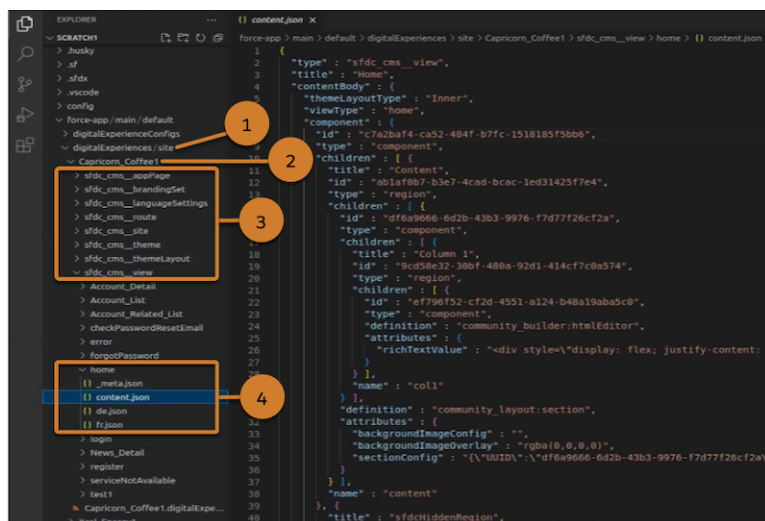
[Release Updates](#)

Level Up Your Site Deployments with New Metadata Types (Generally Available)

Use the new Metadata API DigitalExperienceBundle and DigitalExperienceConfig types to programmatically deploy enhanced LWR sites. Formerly beta, both types are now generally available and exposed to SFDX CLI source control commands. Source tracking is enabled and makes it possible to automatically track changes and see all updated and deleted contents of your 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.

How: To retrieve and deploy DigitalExperienceBundle and DigitalExperienceConfig, use SFDX commands. DigitalExperienceBundle introduces the concept of content as metadata. Each element of your enhanced LWR site is stored on our 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 enhanced LWR site 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 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 \(can be outdated or unavailable during release preview\)](#)

Create Custom Property Editors and Property Types for Lightning Web Components in LWR Sites (Developer Preview)

Make component configuration more intuitive at design time for your site builders—add custom property editors and property types to your custom Lightning web components. For example, give your site builders buttons instead of a text-input field to determine the size of an element. On custom property types, you can define validation rules for your custom editors, such as a minimum and maximum for a number field. Without custom property editors, the user interface in a custom Lightning web component is limited to text boxes, dropdown menus, and a few other kinds of fields.

Where: This change applies to [LWR sites](#) accessed through Lightning Experience and Salesforce Classic in Developer editions.



Note: This feature is available as a developer preview. It isn't generally available unless or until Salesforce announces its general availability in documentation or in press releases or public statements. All commands, parameters, and other features are subject to change or deprecation at any time, with or without notice. Don't implement functionality developed with these commands or tools.

How: Before you create a custom property editor or property type, consider these limitations.

- You can't edit a custom property type after you deploy it to your org.
- You can't use the property types `Color` or `ContentReference` in a component with a custom property editor or property type.

To create a custom property editor, first create a Lightning web component to act as a property editor. Let's say that you create a property editor for postal code. In the `js-meta.xml` file for this editor component, specify the target as `lightning__PropertyEditor`. To use this postal-code editor for a property in a custom Lightning web component, specify `<property type="String" editor="c__postalCodeEditor" name="..." />` in the custom component's `js-meta.xml` file.

To create a custom property type, specify the `schema.json` with an optional `design.json`. Use Metadata API to deploy this custom property type to your org. Let's say that you create a custom property type for background image. To use this property type in a custom Lightning web component, specify `<property type="c__backgroundImage" name="..." />` in the component's `js-meta.xml` file.

For example, here's the `schema.json` for a custom property type called Background Image, which is a composite property type with properties for image, position, and size.

```
{
  "lightning:type": "lightning__objectType",
  "description": "Complex Property representing a background image",
  "title": "Complex background image",
  "properties": {
    "contentKey": {
      "title": "Image",
      "lightning:type": "lightning__textType"
    },
    "bgPosition": {
      "title": "Image Position",
      "lightning:type": "lightning__textType"
    },
    "bgSizeOrRepeat": {
      "title": "Size Or Repeat",
      "lightning:type": "lightning__textType"
    }
  }
}
```

```
}  
}
```

SEE ALSO:

[External Link: Custom Property Types and Property Editors Developer Preview \(can be outdated or unavailable during release preview\)](#)

Troubleshoot Deployment Errors More Easily

To help you identify issues when deploying a site using ExperienceBundle, we continue to add clearer explanations in deployment error messages. If you encounter a problem, the error message includes details on the location of the issue and the steps that you can take to resolve it.

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

How: If you receive an error message that's still unclear or unhelpful, let us know by opening a case with Salesforce Customer Support. Include the prefix `[exp-bundle-error]` in the subject line. For example:

`[exp-bundle-error] Null Pointer Exception`

Site Performance

Get improved performance with micro-batching. Let guest users create cases more efficiently with the Contact Support Form component, receive notifications about micro-batching errors, and test the `CreateRecordsAsync` Apex method with micro-batching. Our Customer Identity experience is also getting an upgrade with new headless login and forgot password flows.

IN THIS SECTION:

[Exceed Person Account Ownership Limit](#)

Large-scale B2C implementations often require a high volume of Salesforce users to act as person account user owners. Now selected users can exceed the Salesforce portal user limit without negatively impacting the site's performance.

[Get Notified About Micro-Batching Errors](#)

You now receive email notifications that outline which errors occurred and which records weren't successfully created. Previously, you ran a query to determine why a case, custom object, or lead failed to process when it was created using micro-batching.

[Validate the Micro-Batching Apex Method with Tests](#)

Developers can now add Apex tests for the `createRecordAsync` method, which allows sites to create cases, leads, and custom objects more efficiently using micro-batching.

[Control Your Identity Experiences with Headless Login and Forgot Password Flows](#)

With the new Authorization Code and Credentials Flow and Headless Forgot Password Flow, you can rely on Salesforce Headless Identity APIs for authentication while maintaining control over your users' experience in a third-party app. Users log in to your app, access protected Salesforce data, and reset their passwords without leaving the app.

[Improve Component Caching in Aura Sites in Sandboxes](#)

To improve performance and cache stability, Experience Cloud now uses the same component loading and caching mechanism on Aura sites as on Lightning Experience. The mechanism can improve site performance when serving static content for the Lightning Component framework, since it can use a content delivery network (CDN). This change is only available in sandboxes, so test your Aura sites to ensure that they perform as expected. Contact Salesforce Customer Support if the Aura sites in your sandbox behave unexpectedly.

Exceed Person Account Ownership Limit

Large-scale B2C implementations often require a high volume of Salesforce users to act as person account user owners. Now selected users can exceed the Salesforce portal user limit without negatively impacting the site's performance.

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

Why: To ensure performance, the current Salesforce limit is 50,000 person account users or business account with ARO enabled users, per Salesforce user. This number can be doubled by Salesforce Support. Now selected users can exceed this limit without negatively impacting the site's performance, so fewer Salesforce users are needed to support the number of portal account users required by your site. Users who are configured as person account owner power users are unable to perform major role changes, such as reparenting and changing roles.

How: Create a PersonAccountOwnerPowerUser object via API. Enter the user ID of the Salesforce user and the type of users that they can own, Customer or Partner.

PersonAccountOwnerPowerUser objects can't be created if deferred sharing is turned on for your org. Turn off deferred sharing to create the PersonAccountOwnerPowerUser object.

Person account owner power users must be at the highest level of a hierarchy.

Get Notified About Micro-Batching Errors

You now receive email notifications that outline which errors occurred and which records weren't successfully created. Previously, you ran a query to determine why a case, custom object, or lead failed to process when it was created using micro-batching.

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

Validate the Micro-Batching Apex Method with Tests

Developers can now add Apex tests for the createRecordAsync method, which allows sites to create cases, leads, and custom objects more efficiently using micro-batching.

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

How: To verify that micro-batching is working as expected via Apex, test the createRecordAsync method in the Apex class by adding the test class definition. For example:

This is the apex class:

```
public class MicrobatchCreateRecord {
    public string microbatchCreateCase(String subject) {
        Case c = new Case();
        c.subject = subject;
        String uuid = Network.createRecordAsync('GENERIC', c);
        return uuid;
    }
}
```

This is the apex test class:

```
@IsTest
public class MicrobatchCreateRecord_Test {
    @IsTest
```

```

public static void testMicrobatchCreateCase() {
    string newCaseSubject = 'ApexTestCase1';
    MicrobatchCreateRecord controller = new MicrobatchCreateRecord();

    Test.startTest();

    string uuid = controller.microbatchCreateCase(newCaseSubject);
    Assert.IsNotNull(uuid);

    Test.getEventBus().deliver();
    Test.stopTest();

    // Assert that the Case was created and has the expected subject
    List<Case> testCases = [Select Id, Subject from Case];
    Assert.AreEqual(1, testCases.size());
    Assert.AreEqual(newCaseSubject, testCases[0].subject);
}
}

```

Control Your Identity Experiences with Headless Login and Forgot Password Flows

With the new Authorization Code and Credentials Flow and Headless Forgot Password Flow, you can rely on Salesforce Headless Identity APIs for authentication while maintaining control over your users' experience in a third-party app. Users log in to your app, access protected Salesforce data, and reset their passwords without leaving the app.

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

SEE ALSO:

[Take Charge of Your Identity Experiences with Headless Login and Forgot Password Flows](#)

Improve Component Caching in Aura Sites in Sandboxes

To improve performance and cache stability, Experience Cloud now uses the same component loading and caching mechanism on Aura sites as on Lightning Experience. The mechanism can improve site performance when serving static content for the Lightning Component framework, since it can use a content delivery network (CDN). This change is only available in sandboxes, so test your Aura sites to ensure that they perform as expected. Contact Salesforce Customer Support if the Aura sites in your sandbox behave unexpectedly.

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

Mobile for Experience Cloud

On enhanced LWR sites, string properties in custom Lightning web components respond to screen size. You can also use Experience Builder to set up the bottom navigation bar for your Mobile Publisher for Experience Cloud app.

IN THIS SECTION:

[Set Up the Navigation Tab Bar Declaratively for Mobile Enhanced LWR Sites \(Beta\)](#)

For Mobile Publisher for Experience Cloud enhanced LWR sites, you can now use Experience Builder to set up the bottom navigation tab bar of your app—no coding required.

[Assign Unique String Property Values for Different Devices in Custom Lightning Web Components \(Beta\)](#)

String properties in custom Lightning web components can now respond to device-screen size for Mobile Publisher for Experience Cloud enhanced LWR sites. Previously, only integer property values could be screen-size responsive. With screen-size responsive properties, custom Lightning web components use the property value that best matches the end user's screen size. You must programmatically declare the properties that you want to be screen-size responsive. Then use Experience Builder to assign the property values for the desktop, tablet, and mobile view modes. Smaller screen sizes inherit property values, unless you assign them a different value.

Set Up the Navigation Tab Bar Declaratively for Mobile Enhanced LWR Sites (Beta)

For Mobile Publisher for Experience Cloud enhanced LWR sites, you can now use Experience Builder to set up the bottom navigation tab bar of your app—no coding required.

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:

[Configure the Navigation Tab Bar for Mobile Publisher for Experience Cloud Enhanced LWR Sites \(Beta\)](#)

Assign Unique String Property Values for Different Devices in Custom Lightning Web Components (Beta)

String properties in custom Lightning web components can now respond to device-screen size for Mobile Publisher for Experience Cloud enhanced LWR sites. Previously, only integer property values could be screen-size responsive. With screen-size responsive properties, custom Lightning web components use the property value that best matches the end user's screen size. You must programmatically declare the properties that you want to be screen-size responsive. Then use Experience Builder to assign the property values for the desktop, tablet, and mobile view modes. Smaller screen sizes inherit property values, unless you assign them a different value.

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:

[Use Unique String Property Values for Mobile Devices in Custom Lightning Web Components \(Beta\)](#)

Security and Sharing

Release updates improve site security and upgrade the Salesforce SAML framework. The user management setting for Hide Personal Information is retired. For API calls in a site with nicknames enabled, the Hide first and last name fields in SOAP API is deprecated.

IN THIS SECTION:

[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 made available in Winter '23 and is enforced in 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 and Experience Cloud External User profiles in new orgs. In Spring '23, Salesforce removes Run Flows from the Guest User profile in all orgs. The change improves site security by requiring explicit guest user permissions to run Flows. To avoid future access issues, update your sites to the new permission structure before the release update is enforced. This update was first available in Summer '22 and was scheduled for the beginning of Spring '23. However, enforcement is postponed to later in Spring '23.

[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.

[Manage Access to Personally Identifiable Information](#)

The Hide Personal Information user management setting is now retired, but you can use Enhanced Personal Information Management to secure personally identifiable information (PII) fields. Customize the user fields that are concealed from external and guest users by adding them to or removing them from the `PersonalInfo_EPIM` field set.

[Restrict Emails Sent from the Guest User \(Release Update\)](#)

This update restricts organizations from sending emails from an unverified email address in the guest user record. Orgs with a verified organization-wide email address aren't affected by this release update, since the "sent from" email address defaults to the org's verified email address. This update is enforced with the Summer '23 release.

[Hide First and Last Name Fields in the SOAP API Is Being Retired](#)

The Hide first and last name fields in the SOAP API for site users when making API calls from within a site with nicknames setting is now retired. To secure the first and last name fields when your users make API calls, enable Enhanced Personal Information Management. Use the instructions at Manage Personal User Information Visibility for External Users to classify personal information fields.

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 made available in Winter '23 and is enforced in Spring '23.

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

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: When this update is enforced, 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.

To review 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](#)

Require Granular Flow Permissions for Experience Cloud Guest Users (Release Update)

In Winter '22, Salesforce discontinued the Run Flows permission for the Guest User and Experience Cloud External User profiles in new orgs. In Spring '23, Salesforce removes Run Flows from the Guest User profile in all orgs. The change improves site security by requiring explicit guest user permissions to run Flows. To avoid future access issues, update your sites to the new permission structure before the release update is enforced. This update was first available in Summer '22 and was scheduled for the beginning of Spring '23. However, enforcement is postponed to later in Spring '23.

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

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: To review and test this update before it's enforced, from Setup, in the Quick Find box, enter *Release Updates*, and then select **Release Updates**. Follow the testing and activation steps for Require Granular Flow Permissions for Experience Cloud Guest Users.

After this update is enforced, to give your guest users access to a specific flow, select **Override default behavior and restrict access to enabled profiles or permission sets** on the flow. Then add that flow to the Enabled Flows list on the Guest User profile.

SEE ALSO:

[Release Updates](#)

[Salesforce Help: Allow Guest Users to Access Flows \(can be outdated or unavailable during release preview\)](#)

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.

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

When: This update was first made available in Summer '22 and is enforced 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.

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.

Manage Access to Personally Identifiable Information

The Hide Personal Information user management setting is now retired, but you can use Enhanced Personal Information Management to secure personally identifiable information (PII) fields. Customize the user fields that are concealed from external and guest users by adding them to or removing them from the PersonalInfo_EPIM field set.

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

How: For customers who enabled the Hide Personal Information setting, but haven't enabled the Enhanced Personal Information setting, Salesforce hides these personal information fields in user records from external users in Spring '23.

- Alias
- EmployeeNumber
- FederationIdentifier
- SenderEmail
- Signature
- Username
- Division
- Title
- Department
- Extension

When the Show Nicknames preference is enabled, these fields are also hidden.

- Name
- First Name (component of the Name field)
- Last Name (component of the Name field)

Conceal a user field by adding it to a field set in the Object Manager. Drag the field into the PersonalInfo_EPIM field set. Classify only fields that contain user PII. Don't classify fields that don't contain PII, such as [system fields](#).

SEE ALSO:

[Enable Stronger Protection for Your Users' Personal Information \(Release Update\)](#)

[Salesforce Help: Manage Personal User Information Visibility for External Users \(can be outdated or unavailable during release preview\)](#)
[Release Updates](#)

Restrict Emails Sent from the Guest User (Release Update)

This update restricts organizations from sending emails from an unverified email address in the guest user record. Orgs with a verified organization-wide email address aren't affected by this release update, since the "sent from" email address defaults to the org's verified email address. This update is enforced with the Summer '23 release.

Where: This change applies to orgs that have a guest user in Lightning Experience or Salesforce Classic.

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: When this update is enforced, emails sent from the org using a guest user's unverified email address are blocked.

To review this update, from Setup, in the Quick Find box, enter *Release Updates*, and then select **Release Updates**. Follow the steps for Restrict Emails Sent from the Guest User.

SEE ALSO:

[Release Updates](#)

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

The Hide first and last name fields in the SOAP API for site users when making API calls from within a site with nicknames setting is now retired. To secure the first and last name fields when your users make API calls, enable Enhanced Personal Information Management. Use the instructions at Manage Personal User Information Visibility for External Users to classify personal information fields.

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

SEE ALSO:

[Enable Stronger Protection for Your Users' Personal Information \(Release Update\)](#)

[Salesforce Help: Manage Personal User Information Visibility for External Users \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Show Nicknames Instead of Full Names in an Experience Cloud Site \(can be outdated or unavailable during release preview\)](#)

Field Service

Customize the mobile app to suit your business needs, and drive mobile worker productivity with Offline Mobile UI Extensibility and Lightning web components. Easily schedule multiday appointments, and then check schedule accuracy with Enhanced Scheduling and Optimization. Set attributes for your assets that let you know when it's time for a checkup or repair. Improve communication and fix rates by using mobile screen sharing between customers and technicians, and make the most of Visual Remote Assistant with reports to guide your mobile workers. No need to juggle apps—work more efficiently on iPad with split-screen functionality and an improved user experience.

IN THIS SECTION:

[Field Service Resource Management](#)

Get more capabilities from Enhanced Scheduling and Optimization. Schedule appointments over multiple days, relocate service resources, define a service resource's capacity for improved schedule optimization, and create more robust scheduling dependencies. Examine the impact of in-day optimization.

[Field Service Asset Management](#)

Manage repairs more efficiently by defining asset attributes. Create manual or automatic work orders by using a rolling window to get consistent results. Reduce time to value by having addresses automatically added to your work orders. Prepare for the retirement of the frequency fields by updating your maintenance plans to use maintenance work rules.

[Field Service Customer Engagement](#)

Enhance Visual Remote Assistant by screen sharing with a mobile device during video meetings, replacing your background with an image, and gaining insights on usage with reports. Streamline the Appointment Assistant experience by enabling additional settings.

[Field Service Mobile](#)

Get more productive with Offline Mobile UI Extensibility and quick actions built with Lightning web components. Upload and annotate images to better solve problems, use Locate Nearby Records and find needed inventory to efficiently complete work, and let mobile workers reschedule follow-up appointments directly with customers. More productivity enhancements let you easily shift between tasks with split-screen capabilities for iPad. You can also filter out unavailable items to simplify your inventory list.

[Spotlight on Field Service Content](#)

Let the Enhanced Scheduling and Optimization learning map be your guide! Find resources to navigate setup tasks and get going on the road to adopting and implementing Enhanced Scheduling and Optimization. Watch videos about our new Field Service features.

Field Service Resource Management

Get more capabilities from Enhanced Scheduling and Optimization. Schedule appointments over multiple days, relocate service resources, define a service resource's capacity for improved schedule optimization, and create more robust scheduling dependencies. Examine the impact of in-day optimization.

IN THIS SECTION:

[Enhanced Scheduling and Optimization](#)

Schedule multiday appointments with Enhanced Scheduling and Optimization. Relocate resources temporarily to a different territory during specific dates to cover for higher demand. Avoid overbooking resources and limit work hours or appointments in a set time period by defining capacity-based resources. Create Same Start dependencies for up to five service appointments when scheduling complex work. And examine in-day optimization improvements in a unified hub.

[Get More Details When Manually Bundling Appointments](#)

See the details of all your bundles at a glance in the Bundle Appointments window. Make sure that you have all the details you need for selecting the most optimal bundle. Previously, you selected a bundle from a list without seeing any details.

Enhanced Scheduling and Optimization

Schedule multiday appointments with Enhanced Scheduling and Optimization. Relocate resources temporarily to a different territory during specific dates to cover for higher demand. Avoid overbooking resources and limit work hours or appointments in a set time period by defining capacity-based resources. Create Same Start dependencies for up to five service appointments when scheduling complex work. And examine in-day optimization improvements in a unified hub.

IN THIS SECTION:

[Get Additional Supported Features with Enhanced Scheduling and Optimization](#)

Schedule multiday appointments using drag and drop, Get Candidates (shows only the time that the multiday work can begin), from the Gantt or using quick actions, and then validate using Check Rules. Relocate service resources temporarily using the Relocation service territory membership type. For example, a mobile worker sometimes needs to cover for increased demand in a particular territory for a specific time period. And define service resources as capacity-based so they aren't overbooked during schedule optimization. For example, mark your contractors as capacity-based resources so that they stay within the number of hours defined in their contract.

[Schedule Complex Work More Efficiently with Expanded Same Start Capabilities](#)

Create Same Start dependencies for up to five service appointments when scheduling complex work among service territories using Enhanced Scheduling and Optimization. Previously, you could schedule Same Start dependencies for only up to two appointments in a dependency group.

[Improve Resource Utilization and Scheduling Quality by Sliding Service Appointments with Dependencies](#)

Free up time for more service appointments when using appointment booking and scheduling operations by enabling service appointment sliding for complex work. Service appointments with dependencies on the Gantt that are scheduled to the same resource can move to an earlier or later time, within the resource's availability. Sliding provides more time slot availability and faster SLA compliance and enables the scheduling of longer service appointments by reducing white spaces. Service appointment sliding is available only with Enhanced Scheduling and Optimization.

[Get the Impact of In-Day Optimization With the Optimization Hub Dashboards](#)

In-day optimization requests continuously optimize your team's schedule, for one or more service territories, during the day of service. When rapidly responding to last-minute schedule upsets, use the Optimization Hub dashboards to measure improvements in the organizational KPIs following the in-day optimization changes. For example, track improvements in response time to service appointments and in the mobile workers' workload.

Get Additional Supported Features with Enhanced Scheduling and Optimization

Schedule multiday appointments using drag and drop, Get Candidates (shows only the time that the multiday work can begin), from the Gantt or using quick actions, and then validate using Check Rules. Relocate service resources temporarily using the Relocation service territory membership type. For example, a mobile worker sometimes needs to cover for increased demand in a particular territory for a specific time period. And define service resources as capacity-based so they aren't overbooked during schedule optimization. For example, mark your contractors as capacity-based resources so that they stay within the number of hours defined in their contract.

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: Service Territory Fields for Field Service \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Work Rule Type: Count Rule \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Define a Service Resource's Capacity \(can be outdated or unavailable during release preview\)](#)

[Salesforce Video: What's new in Enhanced Scheduling and Optimization \(Spring '23\)](#)

Schedule Complex Work More Efficiently with Expanded Same Start Capabilities

Create Same Start dependencies for up to five service appointments when scheduling complex work among service territories using Enhanced Scheduling and Optimization. Previously, you could schedule Same Start dependencies for only up to two appointments in a dependency group.

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 and set up the service territories that use enhanced scheduling. Then create scheduling dependencies between service appointments.

Field Service Home Reports Field Service Accounts Work Orders Service Appointments

Service Appointment SA-0026

Scheduling Dependencies

Add Dependencies

Let users create scheduling dependencies between service appointments. For example, ensure that a particular appointment can't start until a related appointment is complete.

First Appointment Second Appointment

Dependency Type

☐ Assign appointments to the same service resource

Create Dependency

+ SA-0025

+ SA-0026

Visual Dependency Diagram:

```

graph TD
    subgraph TopRow [ ]
        direction LR
        SA0025[SA-0025  
None]
        SA0024[SA-0024  
None]
    end
    SA0025 -- "same day" --> SA0026[SA-0026  
None]
  
```

SEE ALSO:

[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)

Improve Resource Utilization and Scheduling Quality by Sliding Service Appointments with Dependencies

Free up time for more service appointments when using appointment booking and scheduling operations by enabling service appointment sliding for complex work. Service appointments with dependencies on the Gantt that are scheduled to the same resource can move to an earlier or later time, within the resource's availability. Sliding provides more time slot availability and faster SLA compliance and enables the scheduling of longer service appointments by reducing white spaces. Service appointment sliding is available only with Enhanced Scheduling and Optimization.

Where: This feature is available in Lightning Experience and Salesforce Classic in Enterprise, Unlimited, and Developer editions with the Field Service managed package installed.

How: Turn on **Enhanced Scheduling and Optimization** in Field Service Settings. Select **Scheduling > General Logic**, and then select **Enable service appointment sliding**.

SEE ALSO:

[Salesforce Help: Enable Service Appointment Sliding](#) (can be outdated or unavailable during release preview)

Get the Impact of In-Day Optimization With the Optimization Hub Dashboards

In-day optimization requests continuously optimize your team's schedule, for one or more service territories, during the day of service. When rapidly responding to last-minute schedule upsets, use the Optimization Hub dashboards to measure improvements in the organizational KPIs following the in-day optimization changes. For example, track improvements in response time to service appointments and in the mobile workers' workload.

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: Learn About Optimization Hub](#) (can be outdated or unavailable during release preview)

[Salesforce Video: Optimization Hub \(Spring '23\)](#) (can be outdated or unavailable during release preview)

Get More Details When Manually Bundling Appointments

See the details of all your bundles at a glance in the Bundle Appointments window. Make sure that you have all the details you need for selecting the most optimal bundle. Previously, you selected a bundle from a list without seeing any details.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions with the Field Service managed package installed and Appointment Bundling enabled.

Why: Here's what the change looks like.

The screenshot shows the 'Bundle Appointments' window. At the top, it says '1 Service Appointments'. Below this is a table with columns: SA Number, Duration in Minutes, Address, Early Start, Due Date, Work Type, Account, and Required Skills. The table contains one row with SA-0102, 60 minutes, and dates 11/25/2022 4:18 AM and 2/25/2023 4:18 AM. Below the table is a modal window titled 'Create Bundle' with a tab 'Add to Existing Bundle'. Inside the modal is a search bar 'Search bundle service appointments...' and a table with the same columns as the main table. This table contains three rows: SA-0263, SA-0264 (selected), and SA-0267, all with 60 minutes and the same dates. At the bottom of the modal are 'Cancel' and 'Save' buttons.

SEE ALSO:

[Salesforce Help: Create a Bundle Manually](#) (can be outdated or unavailable during release preview)

Field Service Asset Management

Manage repairs more efficiently by defining asset attributes. Create manual or automatic work orders by using a rolling window to get consistent results. Reduce time to value by having addresses automatically added to your work orders. Prepare for the retirement of the frequency fields by updating your maintenance plans to use maintenance work rules.

IN THIS SECTION:

[Track Asset Performance with Asset Attributes](#)

Improve asset management and help your mobile workers efficiently repair and maintain assets by defining attributes that represent asset health and performance. Enable asset managers to shift to proactive, and ultimately predictive, service models that promote higher equipment uptime and compliance. Track and analyze multiple asset attributes by defining thresholds using recordset filter criteria. For example, define a threshold based on attribute values, such as engine temperature, engine pressure, engine oil level, engine air influx, and engine RPM. You can then check the engine for faults by monitoring these attributes. Customers who participated in the pilot and beta program must re-create attribute definitions, asset attributes, and recordset filter criteria monitors.

[Create Appointments with Auto-Populated Addresses](#)

Reduce time to value when work orders are automatically created with addresses based on how you manage your assets. Work orders can pull either the asset address, the visitor address on the asset's location, or shipping address on the maintenance plan account. That address is then added to any subsequent service appointments.

[Get Consistent Results with Standardized Work Order Generation](#)

Implement work order generation with confidence! Work orders created manually for calendar-based maintenance plans now use a rolling window. The window starts on the current date and extends over the generation horizon and generation timeframe. Previously, only the automated method used the rolling window. With the alignment of both methods, manual generation can provide a preview of your automated process.

[Migrate from Maintenance Plan Frequency Fields to Maintenance Work Rules \(Release Update\)](#)

The Frequency and Frequency Type fields on Maintenance Plan began 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. The retired frequency fields will impact work order generation. Complete the migration before Spring '24.

Track Asset Performance with Asset Attributes

Improve asset management and help your mobile workers efficiently repair and maintain assets by defining attributes that represent asset health and performance. Enable asset managers to shift to proactive, and ultimately predictive, service models that promote higher equipment uptime and compliance. Track and analyze multiple asset attributes by defining thresholds using recordset filter criteria. For example, define a threshold based on attribute values, such as engine temperature, engine pressure, engine oil level, engine air influx, and engine RPM. You can then check the engine for faults by monitoring these attributes. Customers who participated in the pilot and beta program must re-create attribute definitions, asset attributes, and recordset filter criteria monitors.

Where: This feature is available in Lightning Experience in Enterprise, Unlimited, and Developer editions with the Field Service managed package installed.

SEE ALSO:

[Salesforce Video: Asset Attributes \(Spring '23\) \(can be outdated or unavailable during release preview\)](#)

Create Appointments with Auto-Populated Addresses

Reduce time to value when work orders are automatically created with addresses based on how you manage your assets. Work orders can pull either the asset address, the visitor address on the asset's location, or shipping address on the maintenance plan account. That address is then added to any subsequent service appointments.

Where: This feature is available in Lightning Experience and Salesforce Classic in Enterprise, Unlimited, and Developer editions.

Who: This feature is available to maintenance work rules users.

How: To set up auto-complete addresses, go to the Field Service Settings page in Setup, and then select **Populate Address for Work Orders or Work Order Line Items**.

SEE ALSO:

[Salesforce Video: Auto-populate Addresses for Maintenance Work Orders](#)

Get Consistent Results with Standardized Work Order Generation

Implement work order generation with confidence! Work orders created manually for calendar-based maintenance plans now use a rolling window. The window starts on the current date and extends over the generation horizon and generation timeframe. Previously, only the automated method used the rolling window. With the alignment of both methods, manual generation can provide a preview of your automated process.

Where: This feature is available in Lightning Experience and Salesforce Classic in Enterprise, Unlimited, and Developer editions.

Who: This feature is available to maintenance work rules users.

How: Although the rolling window is now the default method, you can still use a batch window for manual generation. To set up batch generation, go to the Field Service Settings page in Setup, and then select **Use Batch Generation to Create Work Orders Manually**.

SEE ALSO:

[Salesforce Video: Standardized Calendar-based Maintenance Work Order Generation](#)

Migrate from Maintenance Plan Frequency Fields to Maintenance Work Rules (Release Update)

The Frequency and Frequency Type fields on Maintenance Plan began 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. The retired frequency fields will impact work order generation. Complete the migration before Spring '24.

Where: This feature is available in Lightning Experience and Salesforce Classic in Enterprise, Unlimited, and Developer editions.

When: This release update is enforced in Spring '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: Recent changes to Maintenance Work Rules replace and improve the functionality provided by the frequency fields. Maintenance work rules provide exclusive access to features such as auto-populated addresses on maintenance work orders.

How: In Spring '24, the retired frequency fields will impact work order generation.

For all impacted maintenance plans, select a maintenance plan that uses the frequency fields without the maintenance work rules. 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

Enhance Visual Remote Assistant by screen sharing with a mobile device during video meetings, replacing your background with an image, and gaining insights on usage with reports. Streamline the Appointment Assistant experience by enabling additional settings.

IN THIS SECTION:

[Visual Remote Assistant](#)

Improve troubleshooting by sharing your screen with mobile customers during video meetings, look professional by replacing your video background with an image, and gain insights on Visual Remote Assistant usage with reports.

[Streamline the Appointment Assistant Experience](#)

Let your customers cancel and reschedule their appointment even when the mobile worker is on the way, then notify the mobile worker of the change to the schedule. And let customers edit their address when confirming their upcoming appointment.

Visual Remote Assistant

Improve troubleshooting by sharing your screen with mobile customers during video meetings, look professional by replacing your video background with an image, and gain insights on Visual Remote Assistant usage with reports.

IN THIS SECTION:

[Benefit from Screen Sharing on a Mobile Device 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 and the customer can share their desktop screens to easily troubleshoot and solve customer issues. The mobile worker can view the shared screen on their company mobile device.

[Replace Your Video Background with an Image During a Remote Visual Session](#)

Secure your privacy, promote your brand, and make your video calls look more professional by using a background image during a two-way video session.

[Improve Efficiency with Visual Remote Assistant Reports](#)

Guide agents on how to increase and improve Visual Remote Assistant usage with insights from reports. For example, get information on the number of sessions per user.

Benefit from Screen Sharing on a Mobile Device 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 and the customer can share their desktop screens to easily troubleshoot and solve customer issues. The mobile worker can view the shared screen on their company mobile device.

Where: This feature is available in Lightning Experience in Enterprise, Unlimited, and Developer editions.

Replace Your Video Background with an Image During a Remote Visual Session

Secure your privacy, promote your brand, and make your video calls look more professional by using a background image during a two-way video session.

Where: This feature is available in Lightning Experience in Enterprise, Unlimited, and Developer editions.

Improve Efficiency with Visual Remote Assistant Reports

Guide agents on how to increase and improve Visual Remote Assistant usage with insights from reports. For example, get information on the number of sessions per user.

Where: This feature is available in Lightning Experience in Enterprise, Unlimited, and Developer editions.

Streamline the Appointment Assistant Experience

Let your customers cancel and reschedule their appointment even when the mobile worker is on the way, then notify the mobile worker of the change to the schedule. And let customers edit their address when confirming their upcoming appointment.

Where: This feature is available in Lightning Experience in Enterprise, Unlimited, and Developer editions with the Field Service managed package and Appointment Assistant installed.

How: Enable the settings in the Self-Service Scheduling and Real-Time Location components. Set up the notifications in the Self-Service Scheduling Custom Notifications flow.

Self-Service Scheduling

Operating Hours

Gold Appointments Calendar

Scheduling Policy

Customer First

Show Appointment Slots As

Arrival Windows

Scheduling Horizon Units

Days

Number of Scheduling Horizon Units

10

Show customer's name

Show customer's address

Let customers edit the address

Let customers add notes

Let customers reschedule appointments

Status After Rescheduling

Scheduled

Statuses That Allow Rescheduling

Hours Before Appointment to Disable Rescheduling

3

Let customers cancel appointments

Status After Canceling

Canceled

Statuses That Allow Canceling

Cancellation Reason Picklist

None

Let customers confirm appointments

Status After Confirmation

Appointment Confirmed

Real-Time Location

Show time estimate

Show map

Show team member's exact location

URL for the Team Member's Marker

URL for the Customer's Marker

Show team member's info

Show team member's image

Show Call button

Amazon Connect Phone Number

Let customers reschedule appointments

Let customers cancel appointments

URL for Self-Service Scheduling

SEE ALSO:

[Salesforce Help: Let Customers Reschedule and Cancel Appointments \(can be outdated or unavailable during release preview\)](#)

[Salesforce Video: Streamline the Appointment Assistant Experience \(Spring '23\)](#)

Field Service Mobile

Get more productive with Offline Mobile UI Extensibility and quick actions built with Lightning web components. Upload and annotate images to better solve problems, use Locate Nearby Records and find needed inventory to efficiently complete work, and let mobile workers reschedule follow-up appointments directly with customers. More productivity enhancements let you easily shift between tasks with split-screen capabilities for iPad. You can also filter out unavailable items to simplify your inventory list.

IN THIS SECTION:[Lightning Web Components](#)

Use Lightning web components to shape the mobile app to work best for your business.

[Shift Between Tasks Easily with Field Service Mobile for iPad](#)

Multitask and navigate the mobile app more easily on iPad with a fresh user experience. Mobile workers who need multiple applications to complete jobs can now see two apps at the same time using split-screen functionality. The navigation bar is now on the left side for improved ergonomics and optimized workspace.

[See Only the Inventory You Need](#)

Filter out unavailable inventory items to simplify your list and eliminate time-consuming guesswork when transferring products.

[Ease Priming Tasks with Native Display of Primed Records](#)

The priming process just got simpler. You can now access records primed via a briefcase directly in the app, without first creating a flow or using the Mobile Extension Toolkit (MET). Previously, metadata for records primed via a briefcase was not primed by the app, so you couldn't display those records directly in the app. Now the app primes metadata for briefcase records, so those records can be displayed as lookup fields or related lists on the app's Details page, even when you're offline.

[Limit Mobile Workers' Location Tracking More Easily for Appointment Assistant](#)

The Limited Tracking setting is now in Field Service Mobile Settings. Previously, this setting was enabled from Connected Apps. Limited location tracking is useful for companies that comply with strict regulations when monitoring their mobile workers' whereabouts.

[Guide Your Mobile Workers at the Right Place and the Right Time \(Pilot\)](#)

Give your mobile workers the best next step when they're arriving or leaving the appointment site. For example, when the mobile worker arrives at the appointment, suggest that they fill out the site arrival checklist. That way they have all the information they need to get started.

Lightning Web Components

Use Lightning web components to shape the mobile app to work best for your business.

IN THIS SECTION:[Customize the Field Service Mobile App with Mobile Offline Extensibility \(Generally Available\)](#)

Build offline-capable experiences for your mobile app users with Lightning web components (LWCs). Use standard components to craft an interface suited to your company's needs, and bring your brightest ideas to life by creating custom components to help your workers be more productive. This feature, now generally available, includes some changes since the last release.

[Upload and Annotate Images in the Field Service Mobile App](#)

Configure the Upload and Annotate Images Lightning web component (LWC) to let your mobile workers add images to their work orders or service appointments. Mobile workers can then crop or draw on the image to emphasize certain areas. For example, the mobile worker can add an image of a part that must be fixed and draw an arrow to emphasize the broken area. You can set the size of the images in your configuration.

[Locate Records in the Area to Get the Job Done](#)

Configure the Find Nearby Lightning web component (LWC) to help your mobile workers figure out which records are close by. For example, mobile workers can search for service appointments to see where to go next. Or, they can search for a part they need to complete the task.

[Reschedule Appointments from the Field](#)

Configure the Reschedule Appointments Lightning web component (LWC) to let your mobile workers reschedule appointments for customers directly from the mobile app, without contacting customer services.

Customize the Field Service Mobile App with Mobile Offline Extensibility (Generally Available)

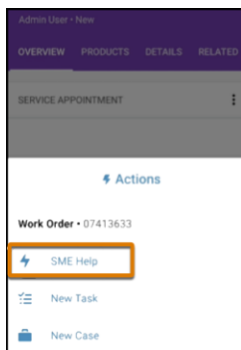
Build offline-capable experiences for your mobile app users with Lightning web components (LWCs). Use standard components to craft an interface suited to your company's needs, and bring your brightest ideas to life by creating custom components to help your workers be more productive. This feature, now generally available, includes some changes since the last release.

Where: This feature is available in the Field Service mobile app for Android and iOS.

Why: Here are just a few of the many things you can do with LWCs.

- Capture data with a custom UI built to suit your use case
- Show relevant data and calculated metrics in a dashboard
- Create robust guided procedures
- Self-assign appointments based on current location
- Build curated help content, including offline capable images

Here's an example where SME Help is built from a custom LWC.



How: Create offline-capable quick actions using custom Lightning web components and add them to the Actions menu.

SEE ALSO:

[Salesforce Help: Customize and Extend the Field Service Mobile App with Lightning Web Components \(can be outdated or unavailable during release preview\)](#)

[Salesforce Developer: Mobile and Offline Developer Guide \(can be outdated or unavailable during release preview\)](#)

[Salesforce Developer: Lightning Web Components Developer Guide \(can be outdated or unavailable during release preview\)](#)

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

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Where: This feature is available in the Field Service mobile app for Android and iOS.

How: Adapt the provided code as needed and deploy the LWC to your org. Then, create a new quick action using the LWC.

**SEE ALSO:**

[Salesforce Video: SFS Mobile Lightning Web Components: Samples and Quick Actions \(Spring '23\)](#)

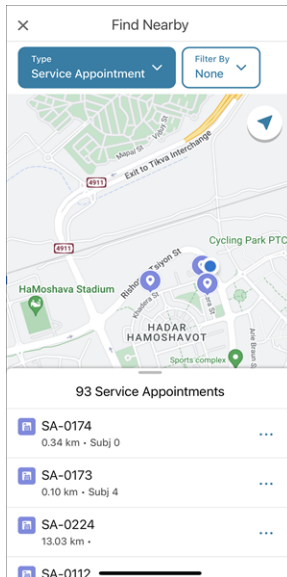
[GitHub: LWC-Mobile-Samples \(can be outdated or unavailable during release preview\)](#)

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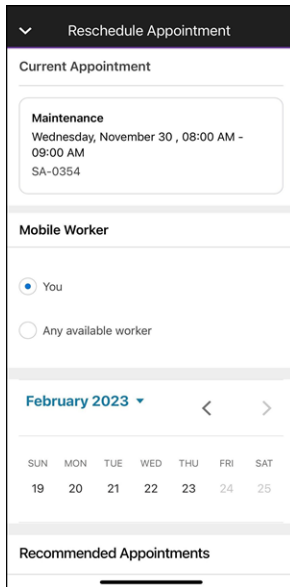
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Reschedule Appointments from the Field

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How: Adapt the provided code as needed and deploy the LWC to your org. Then, create a new quick action using the LWC.



SEE ALSO:

[Salesforce Video: SFS Mobile Lightning Web Components: Samples and Quick Actions \(Spring '23\)](#)

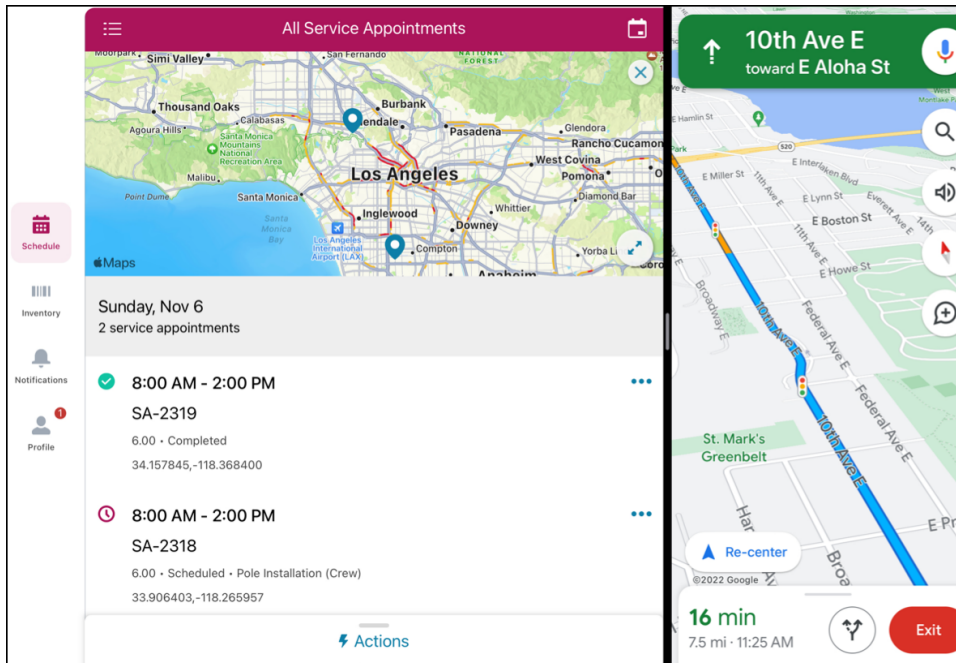
[GitHub: LWC-Mobile-Samples \(can be outdated or unavailable during release preview\)](#)

Shift Between Tasks Easily with Field Service Mobile for iPad

Multitask and navigate the mobile app more easily on iPad with a fresh user experience. Mobile workers who need multiple applications to complete jobs can now see two apps at the same time using split-screen functionality. The navigation bar is now on the left side for improved ergonomics and optimized workspace.

Where: This feature is available in the Field Service mobile app for iPad iOS.

Why: Here's how split-view looks with the Field Service Mobile App and Google Maps.



How: Activate split-view and slide-over multitasking types for iPad from the Multitasking menu, the Dock, and Spotlight. Check Apple support for instructions.

SEE ALSO:

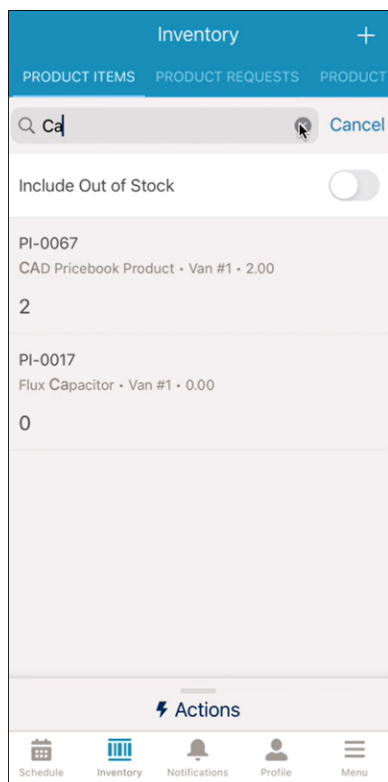
[Salesforce Video: Shift Between Tasks Easily with Field Service Mobile for iPad](#)

See Only the Inventory You Need

Filter out unavailable inventory items to simplify your list and eliminate time-consuming guesswork when transferring products.

Where: This feature is available in the Field Service mobile app for Android and iOS.

How: By default, unavailable inventory isn't returned in a search. To view all inventory, click **Include Out of Stock**.



Ease Priming Tasks with Native Display of Primed Records

The priming process just got simpler. You can now access records primed via a briefcase directly in the app, without first creating a flow or using the Mobile Extension Toolkit (MET). Previously, metadata for records primed via a briefcase was not primed by the app, so you couldn't display those records directly in the app. Now the app primes metadata for briefcase records, so those records can be displayed as lookup fields or related lists on the app's Details page, even when you're offline.

Where: This feature is available in the Field Service mobile app for Android and iOS.

SEE ALSO:

[Salesforce Help: Offline Priming in the Field Service Mobile App \(can be outdated or unavailable during release preview\)](#)

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

Limit Mobile Workers' Location Tracking More Easily for Appointment Assistant

The Limited Tracking setting is now in Field Service Mobile Settings. Previously, this setting was enabled from Connected Apps. Limited location tracking is useful for companies that comply with strict regulations when monitoring their mobile workers' whereabouts.

Where: This change applies to the Field Service mobile app for Android and iOS.

SEE ALSO:

[Salesforce Help: Limit Mobile Workers' Location Tracking for Appointment Assistant \(can be outdated or unavailable during release preview\)](#)

Guide Your Mobile Workers at the Right Place and the Right Time (Pilot)

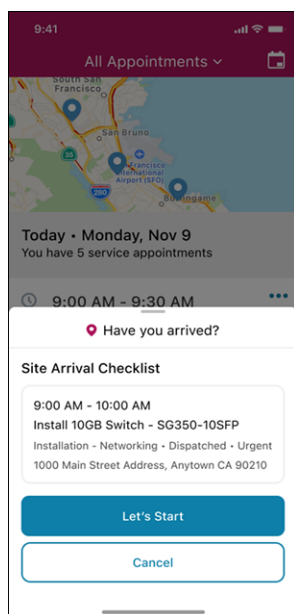
Give your mobile workers the best next step when they're arriving or leaving the appointment site. For example, when the mobile worker arrives at the appointment, suggest that they fill out the site arrival checklist. That way they have all the information they need to get started.

Where: This change applies to the Field Service mobile app for Android and iOS.



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: Refer to the related documentation on Salesforce Help.



SEE ALSO:

[Salesforce Help: Set Up Location-Based Actions for the Field Service Mobile App \(Pilot\) \(can be outdated or unavailable during release preview\)](#)

Spotlight on Field Service Content

Let the Enhanced Scheduling and Optimization learning map be your guide! Find resources to navigate setup tasks and get going on the road to adopting and implementing Enhanced Scheduling and Optimization. Watch videos about our new Field Service features.

IN THIS SECTION:

[Plot a Path to Success with the Enhanced Scheduling and Optimization Learning Map](#)

Start your journey to Enhanced Scheduling and Optimization with curated resources from Salesforce experts for every step of your way. The learning map guides you through setting up optimization, creating optimization jobs, exploring optimization metrics, getting scheduling recommendations, monitoring your optimization, and more.

Watch Videos

New instructional videos help your users learn about new and improved Field Service features.

Plot a Path to Success with the Enhanced Scheduling and Optimization Learning Map


Start your journey to Enhanced Scheduling and Optimization with curated resources from Salesforce experts for every step of your way. The learning map guides you through setting up optimization, creating optimization jobs, exploring optimization metrics, getting scheduling recommendations, monitoring your optimization, and more.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Unlimited, and Developer editions with the Field Service managed package installed.

How: Access the learning map in Salesforce Help to find relevant topics, videos, and other resources. Click through each stage of the learning map to learn more.

Adopt and Implement Enhanced Scheduling and Optimization

Enhanced Scheduling and Optimization replaces the optimization functionality and associated manual and semiautomatic scheduling services you've been using. The new architecture and services are more efficient and improve scalability, performance, and schedule quality. Built on the Hyperforce platform, Enhanced Scheduling and Optimization has performance and scale like never before and provides a framework to host innovative new functionality to take Salesforce Field Service to the next level. Learn more about setting up optimization and creating optimization jobs, explore optimization metrics, and get scheduling recommendations. Start your journey to Enhanced Scheduling and Optimization, with resources for every step of your way.



Your Guide to Enhanced Scheduling and Optimization








Get Started	Set Up Enhanced Scheduling and Optimization	Create a Scheduled Optimization Job
<ul style="list-style-type: none"> Get Ready for Enhanced Scheduling and Optimization What's Available in Enhanced Scheduling and Optimization What's Schedule Optimization? Video: Enhanced Scheduling and Optimization What's the Fate of Existing Salesforce Customizations? 	<ul style="list-style-type: none"> Enable Enhanced Scheduling and Optimization Create the Field Service Integration Permission Set Configure Remote Site Settings (Enable Point-to-Point Routing) Set Up Routing for Travel Time Calculations Considerations for Point-to-Point Predictive Routing 	<ul style="list-style-type: none"> Set Up and Run Enhanced Optimization JobsModel

SEE ALSO:

[Salesforce Help: Enhanced Scheduling and Optimization Learning Map](#) (can be outdated or unavailable during release preview)

Watch Videos

New instructional videos help your users learn about new and improved Field Service features.

-  [SFS Mobile Lightning Web Components: Samples and Quick Actions](#) shows how Lightning web components can let your mobile workers find nearby records, add images to a record, and reschedule an appointment directly from the Field Service mobile app.
-  [What's New in Enhanced Scheduling and Optimization](#) gives an overview of additional features now supported, such as multiday appointment scheduling, resource relocation, capacity-based resources, and improved complex work capabilities.
-  [Optimization Hub](#) demonstrates how to use the Optimization Hub dashboard to gain insights into how scheduling optimization improves your business metrics.
-  [Standardized Calendar-based Maintenance Work Order Generation](#) shows how a rolling window is now the standard method for creating work orders manually and automatically.
-  [Asset Attributes](#) demonstrates using asset attributes to track asset health and performance.
-  [Auto-populate Addresses for Maintenance Work Orders](#) describes how addresses are automatically added to work orders.
-  [Streamline the Appointment Assistant Experience](#) shows how your customers can edit their addresses when confirming their appointments. Your customers can also cancel and reschedule their appointments even when the mobile worker is on the way.

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 global 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.

[Migrate to Hyperforce with Hyperforce Assistant](#)

You can now upgrade to Hyperforce with help from Hyperforce Assistant. To use the assistant, you must be eligible for an upgrade to Hyperforce. You can launch Hyperforce Assistant via in-app prompts, or you can select it manually from the setup menu.

Access Salesforce in More Regions with Hyperforce

With Hyperforce, you can deploy Salesforce apps and services in a growing number of global regions by using the scale and agility of the public cloud. Hyperforce is already available in many regions so that you can benefit from the power of the public cloud.

Where: The Salesforce Customer 360 application suite, including Sales Cloud, Service Cloud, B2B Commerce, Platform, and Industries Cloud, is automatically available via Hyperforce in Australia, Canada, France, Germany, India, Japan, Singapore, the United Kingdom, and the United States. The Salesforce Customer 360 application suite is available on Hyperforce by request in South Korea and Sweden. 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, India, United States
Marketing	Marketing Cloud Engagement	Marketing Cloud Engagement helps build customer	India

Cloud	Product or Feature	Description	Available In
		relationships efficiently with personalized marketing messages and automated journeys.	
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, South Korea, Sweden, United Kingdom, United States

Migrate to Hyperforce with Hyperforce Assistant

You can now upgrade to Hyperforce with help from Hyperforce Assistant. To use the assistant, you must be eligible for an upgrade to Hyperforce. You can launch Hyperforce Assistant via in-app prompts, or you can select it manually from the setup menu.

Where: Hyperforce Assistant is available in Lightning Experience and Salesforce Classic in all editions.

Why: With the Hyperforce Assistant, you can access this information from the app.

- The Learn tab adds comprehensive information about Hyperforce benefits, including infographics and a global map of existing Hyperforce regions.
- The Prepare phase adds a check that reports on all Apex classes that have hard-coded URLs.
- A new Upgrade tab provides information to customers who are scheduled for org migrations. The information includes the upgrade date and the org's new region.

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 mass org migration (MOM), manually launch the assistant. From Setup, in the Quick Find Box, enter *Hyperforce Assistant* and then select **Hyperforce Assistant**.

Industries

Industries solutions are tailored to what you do, so you don't have to customize Salesforce on your own. Automotive Cloud provides a template for connecting with stakeholders through Experience Cloud sites. In Health Cloud, the Crisis Support Center Management app helps counselors provide mental and behavioral health support, and authorization requests get better. Loyalty Management has a new wizard that makes it easier to manage promotions. Manufacturing Cloud offers improved sales agreements and forecasting. Public Sector Solutions make it easier to capture referrals and provide financial aid to constituents. Consumer Goods Cloud has a new Analytics app. Net Zero Cloud supports more fuel types and improved carbon accounting. We've also enhanced the data processing engine, added decision tables to flows, and much more.

IN THIS SECTION:

[Automotive Cloud](#)

Develop meaningful relationships with partners and customers with the Automotive template for Experience Cloud. Dealers can get visibility into vehicles and services, visits and claims, forecasts and agreements, and stakeholder relationships using the Experience Cloud sites. Create complex household relationships and define roles to get a complete view of customers. Create asset participants directly from Account and Contact records. Use the Bundle Tree to visualize parent and child products. Get newer insights into leads and vehicle portfolio with CRM Analytics. Make the most of service excellence enhancements to Identity Verification and Action Launcher. Connect with customers in a streamlined manner with actionable lists.

[Consumer Goods Cloud](#)

Get greater visibility into your business efficiency with the new Analytics for Consumer Goods - Advanced Data Model app. Capture customer-reported issues accurately and improve customer satisfaction by configuring the new mobile app domain in mobility framework. Additionally, set the default initial response in a picklist to empty or blank using the new attribute in Consumer Goods Modeler.

[Financial Services Cloud](#)

Improve efficiencies with automation and integration capabilities built in Financial Services Cloud.

[Health Cloud](#)

Health Cloud has new features to help engage better with patients and provide improved care services. Integrated Care Management introduces a new care plan solution that supports assessments and action plans. Virtual Care connects with more participants and has improved moderation capabilities. The Contact Center for Health Cloud app helps agents verify caller identities and quickly resolve questions. Crisis support counselors can use the Crisis Support Center Management app to help their clients with mental and behavioral crises. Utilization Management streamlines authorization request submissions with support for concurrent reviews and enhanced business rules. Advanced Therapy Management supports partial rescheduling for appointments in a series.

[Loyalty Management](#)

Create promotions and define their eligibility and rewards in three simple steps by using the Quick Promotion wizard. Ensure customer service reps can easily engage with members and provide contextual support. Automate the process of generating voucher codes and member referral codes. Allow customer service reps to merge memberships with ease. Track the changes in the statuses and subscriptions of members. Easily style widgets with your company's branding and add new widgets on third-party sites.

[Manufacturing Cloud](#)

Do more with enhancements to Sales Agreements and Advanced Account Forecasting. Empower service reps to deliver prompt service to customers and protect customer information with enhancements to Manufacturing for Service features.

[Public Sector Solutions](#)

Understand your constituents better by gaining deeper insights into their relationships. Capture referrals with ease using guided flows. Extend monetary assistance to eligible constituents. Deliver services to constituents using programs. Set up more of your org with ease with new assistants in Guided Setup.

[Net Zero Cloud](#)

You can now offer more fuel types, manage social and governance data, and consolidate emissions from your subsidiaries and business units by extending carbon accounting in your Net Zero Cloud org. You can also generate disclosures and compliance reports using a guided process.

[Salesforce for Education](#)

Salesforce for Education includes products that connect insights across recruitment, admissions, and student success for a unified view of every learner's journey—from prospective students to engaged alumni.

[Salesforce for Nonprofits](#)

Salesforce for Nonprofits includes products that meet the unique needs of nonprofits. These products empower organizations to go from siloed data to actionable insights, transforming constituent engagements into lifelong relationships.

[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, added decision tables to flows, and much more.

Automotive Cloud

Develop meaningful relationships with partners and customers with the Automotive template for Experience Cloud. Dealers can get visibility into vehicles and services, visits and claims, forecasts and agreements, and stakeholder relationships using the Experience Cloud sites. Create complex household relationships and define roles to get a complete view of customers. Create asset participants directly from Account and Contact records. Use the Bundle Tree to visualize parent and child products. Get newer insights into leads and vehicle portfolio with CRM Analytics. Make the most of service excellence enhancements to Identity Verification and Action Launcher. Connect with customers in a streamlined manner with actionable lists.

IN THIS SECTION:

[Collaborate with Dealers and Customers Better with Experience Cloud](#)

Create a partner or customer portal using the Automotive template for Experience Cloud. You can share vehicle and asset details, work orders and warranties, visits and action plans, and customer details with dealer user groups. Dealers can manage leads and opportunities, engage with customers more effectively, and track key milestones and stakeholders related to their vehicles using the site. For customers, you can create an external portal to manage vehicle sales and services.

[Track Complex Household Roles and Relationships](#)

Visualize a customer's multiple relationships in the updated Household data model. You can record the groups and households that a customer is a member of, the different accounts and contacts that they're related to, and their roles in each of these relationships. As a dealer or manufacturer, you can drive personalized sales and services based on the enhanced household information.

[View Asset Participants Directly in Account and Contact Records](#)

Relate assets, such as vehicles, parts, and accessories, with accounts or contacts directly from an Account or Contact page. Add the Asset Account Participants and Asset Contact Participants related lists to the Account and Contact page layouts, respectively. You can now create asset account participants and asset contact participants from the related lists of an Account or Contact record respectively.

[Create Product Bundles with Parent and Child Products](#)

Create product bundles to specify which products can be sold together. Now you can create Product records with type as Bundle and create Product Relationship Type records to define the relation between a parent and component products. Use the Bundle Tree component on the Product page to visualize the hierarchy of parent and child products. The Compatible Parts & Accessories related list on a Vehicle record shows all the child products related to the parent Vehicle product record.

Manage Automotive Dealers Effectively with Branch Management

Track your dealer's performance better by using Branch Management in Automotive Cloud. Create branch units and associate dealer users and customers to the branches. And add additional details such as operating hours and service territory for a branch.

Assign Leads, Cases, and Opportunities Quickly to Automotive Dealers

Use Record Association Builder to define the criteria for creating, updating, and automatically assigning records to a dealer's branch unit. Define your own criteria to relate records such as customer accounts, leads, opportunities, and cases to a dealer's branch. For example, define a criterion to automatically assign qualified leads of a specific rating to a dealer's user's selected branch unit.

Take Advantage of Enhancements to Sales Agreements and Advanced Account Forecasting

Collaborate better on long-term business negotiations with your dealers with sales agreements which now support up to five decimal points for revenue metrics, and metric groupings. You can now also forecast your business numbers based on dimensions other than account, such as dealer location, or business brand. You can also control user access on actions like Mass Update and Import CSV for advanced account forecasts, and on Masss Update for sales agreements.

Get Insights into Leads and Prioritize Your Vehicle Portfolio

Analyze your lead conversion rates, and identify high-value leads with the new Leads Intelligence dashboard. Use the Vehicle Portfolio Management dashboard to prioritize your vehicle portfolio based on warranty expiry, work order details, and recalls. Get started in Analytics Studio by using the Analytics for Automotive template.

Service Experience Enhancements for Automotive

A customer service representative can now verify the identity of a customer and their authorized representative over messaging. Add up to 10 frequently used actions to the Action Launcher. Select action deployments easily from a filtered list in Lightning App Builder based on the object record page that you're editing. Service agents can launch a flow orchestration to quickly resolve customer requests.

Actionable Segmentation for Automotive (Beta)

Create actionable lists for your automotive sales and service teams so that they can quickly engage with outbound customers and prospects. Enable your list creators to meet business goals by assigning prioritized actionable lists to sales or service reps and providing guidance on prospect or customer engagement.

Collaborate with Dealers and Customers Better with Experience Cloud

Create a partner or customer portal using the Automotive template for Experience Cloud. You can share vehicle and asset details, work orders and warranties, visits and action plans, and customer details with dealer user groups. Dealers can manage leads and opportunities, engage with customers more effectively, and track key milestones and stakeholders related to their vehicles using the site. For customers, you can create an external portal to manage vehicle sales and services.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Automotive Cloud and Digital Experiences are enabled.

Who: Depending on the objects that you want to provide access to, users must have the Automotive Foundation For Experience Cloud, Partner Visit Management For Experience Cloud, Partner Lead Management for Experience Cloud, and Partner Performance Management for Experience Cloud permission sets.

How: From Setup, go to Feature Settings. Under Digital Experiences, select **All Sites**. Click **New** and select the **Automotive** template. Click **Get Started** to create a site.

Neogen Auto

Search

Home Customers Prospects Actions and Visits Services Vehicles and Parts Sales Business Planning

Welcome!
Explore deals, vehicles,
and more.

ALL VEHICLES

[Abhilash's NeoGen Electra](#)
5LMFU27R24LJ20426 · ENG24LJ20426 · Abhilash Jena · At Customer Location · 5,729.00

[Dimple's NeoGen Delta](#)
2T1BU4EE7BC542360 · ENGBC542360 · Dimple Singh · In Repair · 15,943.00

[Harry's NeoGen Alpha](#)
1FTFW1ET38FD00875 · ENGBFD00875 · Harry Kapoor · At Dealer Location · 10.00

[Simran's NeoGen Sigma](#)
WDCGG5GB9CF715613 · ENGCF715613 · Simran Kaur · At Customer Location · 8,102.00

[View All](#)

Leads

Sarah Loehr
System Administrator · MedLife, Inc. · (555) 555-1212 · info@salesforce.com [Accept](#)

Mr. John Gardner
Exec VP · 3C Systems · (555) 555-1212 · info@salesforce.com [Accept](#)

Mr. Andy Smith
Vice President · Universal Technologies · (555) 555-1212 · info@salesforce.com [Accept](#)

Jim Steele
Senior VP · BigLife Inc. · (555) 555-1212 · info@salesforce.com [Accept](#)

Phil Collins
NeoGen Alpha [Accept](#)

[View All Open Leads](#)

MY OPPORTUNITIES

[Acme - 1,200 Widgets](#)
Acme · 8/31/2020 · \$140,000.00 · Abhilash Jena

[Acme - 200 Widgets](#)
Acme · 12/30/2020 · \$20,000.00 · Abhilash Jena

[Acme - 600 Widgets](#)
Acme · 10/27/2020 · \$70,000.00 · Abhilash Jena

[George Newton - NeoGen Alpha](#)
National Motors · Hyderabad · 12/10/2022 · \$60,000.00 · Abhilash Jena

[Global Media - 400 Widgets](#)
Global Media · 9/29/2020 · \$40,000.00 · Abhilash Jena

[Penny Jackson - NeoGen Delta](#)
National Motors · Hyderabad · 12/15/2022 · \$28,000.00 · Abhilash Jena

[salesforce.com - 1,000 Widgets](#)
salesforce.com · 8/31/2020 · \$100,000.00 · Abhilash Jena

[salesforce.com - 2,000 Widgets](#)
salesforce.com · 10/29/2020 · \$20,000.00 · Abhilash Jena

[View All](#)

MY OPEN CASES

[Sample Case: Our Widgets have not been delivered.](#)
High · Escalated · 00001000

[Sample Case 2: The widgets we received are the wrong size.](#)
High · New · 00001001

[Sample Case 3: Cannot track our order.](#)
Low · On Hold · 00001002

[Need help on how to use the MID](#)
Medium · New · 00001003

[Car home pick-up for 1st servicing](#)

SEE ALSO:

[Salesforce Help: Set Up Experience Cloud Sites for Automotive \(can be outdated or unavailable during release preview\)](#)

Track Complex Household Roles and Relationships

Visualize a customer's multiple relationships in the updated Household data model. You can record the groups and households that a customer is a member of, the different accounts and contacts that they're related to, and their roles in each of these relationships. As a dealer or manufacturer, you can drive personalized sales and services based on the enhanced household information.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Automotive Cloud and Group Membership are enabled.

Who: This feature is available only to users who have the Automotive Foundation User and Group Membership permission sets.

How:

- To relate a contact with multiple accounts, click **Add Relationship** on the Related Contacts related list on an Account record page. Specify the details of the record.
- To relate two business accounts, from the App Launcher, find and select **Account Account Relationships**, and then click **New**. Specify the details of the record.
- To relate two contacts or two person accounts, from the App Launcher, find and select **Contact Contact Relationships**, and then click **New**. Specify the details of the record.
- To define the roles of two people in a relationship, find and select **Party Role Relationships**, and then click **New**. Specify the details of the record.

Account Account Relationship
AAR-000000001

Account: [National Motors - Hyderabad](#) Related Account: [National Motors](#) Party Role Relationship: [PRR-000000001](#) Active: ☒ Start Date:

Details

Account Account Relationship (mode=View, version=RRH)

Account Relationship Id	AAR-000000001	Related Account	National Motors
Account	National Motors - Hyderabad	Active	<input checked="" type="checkbox"/>
Party Role Relationship	PRR-000000001	End Date	
Start Date		Hierarchy Type	Parent
Related Inverse Record			

SEE ALSO:

[Salesforce Help: Groups and Households in Automotive Cloud \(can be outdated or unavailable during release preview\)](#)

View Asset Participants Directly in Account and Contact Records

Relate assets, such as vehicles, parts, and accessories, with accounts or contacts directly from an Account or Contact page. Add the Asset Account Participants and Asset Contact Participants related lists to the Account and Contact page layouts, respectively. You can now create asset account participants and asset contact participants from the related lists of an Account or Contact record respectively.

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 sets.

Create Product Bundles with Parent and Child Products

Create product bundles to specify which products can be sold together. Now you can create Product records with type as Bundle and create Product Relationship Type records to define the relation between a parent and component products. Use the Bundle Tree component on the Product page to visualize the hierarchy of parent and child products. The Compatible Parts & Accessories related list on a Vehicle record shows all the child products related to the parent Vehicle product record.

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: Add Components to Product Bundles in Automotive Cloud \(can be outdated or unavailable during release preview\)](#)

Manage Automotive Dealers Effectively with Branch Management

Track your dealer's performance better by using Branch Management in Automotive Cloud. Create branch units and associate dealer users and customers to the branches. And add additional details such as operating hours and service territory for a branch.

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:

- To create a branch unit, from the App Launcher, find and select **Branch Units**, and then click **New**.
- To add a dealer user to a branch unit, click **New** on the Branch Unit Business Members related list on the Related tab of a Branch Unit record.
- To add customers to a branch unit, click **New** on the Branch Unit Customers related list on the Related tab of a Branch Unit record.

The screenshot displays the Salesforce interface for a Branch Unit. At the top, the breadcrumb trail shows 'BC-00000002' and 'Dream S...'. Below this, the header section identifies the 'Branch Unit' as 'Dream Service California'. A summary bar contains the following fields: 'Branch Code' (B002), 'Branch Manager', 'Type' (Physical), 'Active' (checked), 'Parent Branch', and 'Operating Hours' (Operating Hours USA). The main content area is divided into 'Related' and 'Details' tabs, with 'Details' currently selected. Under the 'Details' tab, there is an 'Information' section with a list of fields and their values, each with an edit icon (pencil):

Information	
Name	Dream Service California
Account	Dream Autoservice California
Branch Manager	
Start Date	1/1/2005
Active	<input checked="" type="checkbox"/>
Operating Hours	Operating Hours USA
Parent Branch	
Branch Code	B002
Type	Physical
Operational State	
End Date	
Service Territory	

Assign Leads, Cases, and Opportunities Quickly to Automotive Dealers

Use Record Association Builder to define the criteria for creating, updating, and automatically assigning records to a dealer's branch unit. Define your own criteria to relate records such as customer accounts, leads, opportunities, and cases to a dealer's branch. For example, define a criterion to automatically assign qualified leads of a specific rating to a dealer's user's selected branch unit.

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: To add and define a criterion, from Setup, go to and then turn on Record Association Builder. Click **New Criteria**.

Record Association Builder

Track your team's productivity using the Record Association Builder. Define criteria to automatically create association records in response to data creation or update events.

Association Criteria

Reference Object: All Status: All

New Criteria Delete Criteria

1 items, 0 selected, sorted by Last Modified Date

Label	Asso...	Refer...	Event...	Prec...	Desc...	Status
Lead Association	BranchMa...	Lead	Create	ISPICKVA...	Test	Active

Take Advantage of Enhancements to Sales Agreements and Advanced Account Forecasting

Collaborate better on long-term business negotiations with your dealers with sales agreements which now support up to five decimal points for revenue metrics, and metric groupings. You can now also forecast your business numbers based on dimensions other than account, such as dealer location, or business brand. You can also control user access on actions like Mass Update and Import CSV for advanced account forecasts, and on Masss Update for sales agreements.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Automotive Cloud, Sales Agreements, and Advanced Account Forecasting are enabled.

Who: This feature is available only to users who have the Automotive Foundation User, Manufacturing Sales Agreements, and Manufacturing Advanced Account Forecast permission sets.

Get Insights into Leads and Prioritize Your Vehicle Portfolio

Analyze your lead conversion rates, and identify high-value leads with the new Leads Intelligence dashboard. Use the Vehicle Portfolio Management dashboard to prioritize your vehicle portfolio based on warranty expiry, work order details, and recalls. Get started in Analytics Studio by using the Analytics for Automotive template.

Where: This change applies to CRM Analytics in Lightning Experience in Enterprise, Unlimited, and Performance 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.

Service Experience Enhancements for Automotive

A customer service representative can now verify the identity of a customer and their authorized representative over messaging. Add up to 10 frequently used actions to the Action Launcher. Select action deployments easily from a filtered list in Lightning App Builder based on the object record page that you're editing. Service agents can launch a flow orchestration to quickly resolve customer requests.

IN THIS SECTION:

[Verify Caller Identity Over Messages](#)

Customer service representatives or service agents can now verify the identity of a customer or their authorized representative when the preferred channel of communication is in-app messaging, web chat, or WhatsApp.

[Improve Accessibility by Showing Business Names of OmniScripts](#)

Assist your customer service representatives in launching OmniScripts quickly from Action Launcher by showing business names that clarify what the OmniScripts are meant to achieve. Use the Console Tab Title field in OmniStudio to specify the business name of an OmniScript.

[Find Action Launcher Deployments Quickly](#)

Select an Action Launcher deployment from a filtered list based on the object record page you're editing in Lightning App Builder.

[Help Customers Faster by Launching Flow Orchestration Quickly](#)

Customer service representatives can now launch flow orchestrations directly from Action Launcher and provide prompt customer service.

[Boost the Productivity of Customer Service Representatives](#)

Give your customer service representatives easy access to up to 10 frequently used actions on Action Launcher. Frequently used actions help service reps respond quickly to repetitive customer requests and save time on searching for actions.

[Provide Localized Experience to Global Customer Service Representatives](#)

Provide your global customer service representatives localized names for OmniScripts in Action Launcher. Create a custom label with translated text. Then, add the custom label to the Console Tab Title field in OmniStudio to display the localized business name for an OmniScript in Action Launcher.

[Provide Enhanced Action Launcher Search Experience](#)

Customer service representatives can experience improved readability and enhanced search results. The search keywords appear in bold in the name and description of actions, which show up in Action Launcher search results.

[Streamline Automotive Service Operations with Service Process Studio](#)

Design and create unique service processes by using an intuitive wizard or customize a service process template. Define data attributes, relate an input request form, add business logic, relate an integration configuration to communicate with your external vehicle or dealer management systems, and link to a fulfillment process.

[Changed Objects for Engagement Interaction](#)

Do more with the updated Engagement Interaction objects.

[Changes in the RecordActionDeployment Metadata Type](#)

Make the most of the changed Action Launcher metadata type.

Verify Caller Identity Over Messages

Customer service representatives or service agents can now verify the identity of a customer or their authorized representative when the preferred channel of communication is in-app messaging, web chat, or WhatsApp.

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.

How: Set up Omni-Channel for in-app, web, and WhatsApp messaging. Assign the Messaging User permission set to users of in-app and web messaging. Assign the Messaging User permission set and the Messaging User permission set license to users of Whatsapp messaging. Customize the Messaging Session Lightning record page per your requirements and add the identity verification flow to it.

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Assist your customer service representatives in launching OmniScripts quickly from Action Launcher by showing business names that clarify what the OmniScripts are meant to achieve. Use the Console Tab Title field in OmniStudio to specify the business name of an OmniScript.

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.

Find Action Launcher Deployments Quickly

Select an Action Launcher deployment from a filtered list based on the object record page you're editing in Lightning App Builder.

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.

How: Add the Action Launcher component to a Lightning record page in Lightning App Builder. In the Properties panel, view the filtered list of deployments based on the object record page you're editing. Select the required deployment.

Help Customers Faster by Launching Flow Orchestrations Quickly

Customer service representatives can now launch flow orchestrations directly from Action Launcher and provide prompt customer service.

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.

How: On the Action Launcher page in Setup, create a deployment by selecting the **Flows and quick actions** checkbox. Then, select the associated flow orchestrations that you want to include in Action Launcher. Next, add the **Action Launcher** component to a Lightning record page in Lightning App Builder. In the Properties panel, select a deployment.

Boost the Productivity of Customer Service Representatives

Give your customer service representatives easy access to up to 10 frequently used actions on Action Launcher. Frequently used actions help service reps respond quickly to repetitive customer requests and save time on searching for actions.

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.

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, select up to 10 frequently used actions to display on Action Launcher. Next, add the Action Launcher component to a Lightning record page in Lightning App Builder. In the Properties panel, select the deployment.

Provide Localized Experience to Global Customer Service Representatives

Provide your global customer service representatives localized names for OmniScripts in Action Launcher. Create a custom label with translated text. Then, add the custom label to the Console Tab Title field in OmniStudio to display the localized business name for an OmniScript in Action Launcher.

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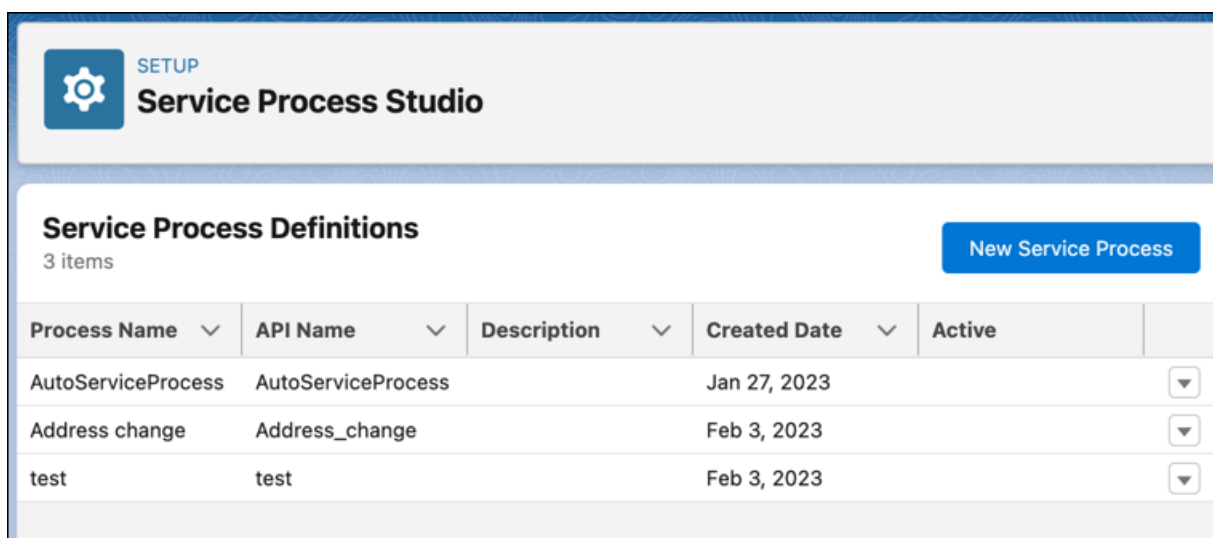
Streamline Automotive Service Operations with Service Process Studio

Design and create unique service processes by using an intuitive wizard or customize a service process template. Define data attributes, relate an input request form, add business logic, relate an integration configuration to communicate with your external vehicle or dealer management systems, and link to a fulfillment process.

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.

How: To create a service process, from Setup, in the Quick Find box, enter *Service Process Studio*, and then select **Service Process Studio**. Click **New Service Process**.



Process Name	API Name	Description	Created Date	Active
AutoServiceProcess	AutoServiceProcess		Jan 27, 2023	
Address change	Address_change		Feb 3, 2023	
test	test		Feb 3, 2023	

To make your service processes readily accessible to your service agents, deploy the service processes on record pages or the Service Console for Automotive using Action Launcher.

Changed Objects for Engagement Interaction

Do more with the updated Engagement Interaction objects.

Connect an engagement attendee to a messaging session

Use the updated `EngagementId` field on the EngagementAttendee object.

Save the caller's phone number to understand the context of a subsequent call without revealing the caller's identity

Use the new `PhoneNumber` field on the EngagementInteraction object.

Connect an engagement topic to a messaging session

Use the updated `EngagementId` field on the EngagementTopic object.

Specify a TransactionJournal, or a custom object record as a topic of engagement

Use the updated `TopicId` field on the EngagementTopic object.

Changes in the RecordActionDeployment Metadata Type

Make the most of the changed Action Launcher metadata type.

Indicate whether an action is frequently accessed by users

Use the new `IsFrequentAction` field of the RecordActionSelectableItem subtype on the RecordActionDeployment metadata type.

Store the sequence number of a frequently used action that's shown on Action Launcher

Use the new `FrequentActionSequenceNbr` field of the RecordActionSelectableItem subtype on the RecordActionDeployment metadata type.

Actionable Segmentation for Automotive (Beta)

Create actionable lists for your automotive sales and service teams so that they can quickly engage with outbound customers and prospects. Enable your list creators to meet business goals by assigning prioritized actionable lists to sales or service reps and providing guidance on prospect or customer engagement.



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](#).

IN THIS SECTION:

[Help Your Sales and Service Team Meet Their Targets \(Beta\)](#)

Provide your sales or service agents with a prioritized and consolidated list of prospects, including existing customers, they can contact. Make the Outreach List tab (beta) available for sales or service agents in the navigation menu of the Automotive app.

[Help List Creators Improve Their Sales and Service Team's Success \(Beta\)](#)

Sales and service team leads can assign an actionable list to reps so they can engage with prospects. List creators can determine which prospects, including existing customers, can be contacted first by reps. To further enhance prospect engagement, list creators can also assign an OmniScript for providing guidance to reps. In Lightning App Builder, add the Actionable List Members component (beta) to the Account or Contact record page.

[Improve Engagement Abilities of Your Sales and Service Teams \(Beta\)](#)

Provide your customer service representatives and sales representatives timely and contextual guidance on prospect outreach and promotion of products and services. In Lightning App Builder, add the Actionable List Engagement component (beta) to the Account or Contact record page.

Actionable List Members Connect API (Beta)

Use the Actionable List Members Connect API (beta) to get actionable list members and update the priority, OmniScript key, and assignees of actionable lists.

Help Your Sales and Service Team Meet Their Targets (Beta)

Provide your sales or service agents with a prioritized and consolidated list of prospects, including existing customers, they can contact. Make the Outreach List tab (beta) available for sales or service agents in the navigation menu of the Automotive app.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Automotive Cloud is enabled.



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

Who: This feature is available only to users who have the Automotive Foundation User and the Industry Sales Excellence permission sets.

Help List Creators Improve Their Sales and Service Team's Success (Beta)

Sales and service team leads can assign an actionable list to reps so they can engage with prospects. List creators can determine which prospects, including existing customers, can be contacted first by reps. To further enhance prospect engagement, list creators can also assign an OmniScript for providing guidance to reps. In Lightning App Builder, add the Actionable List Members component (beta) to the Account or Contact record page.

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

Get a list of actionable list members in the context of filter criteria

Make a POST request to the new

`/services/data/{version}/connect/sales-excellence/actionable-list-members`

New request body: Search Actionable List Member Input

New response body: Search Actionable List Members

Retrieve the actionable list members for the specified actionable list ID

Make a POST request to the new

`/services/data/{version}/connect/sales-excellence/actionable-list-members/${actionableListId}`

New request body: Search Actionable List Member Input

New response body: Search Actionable List Members

Update the priority and OmniScript key in the ActionableList entity and assignee in the ActionableListMember entity

Make a POST request to the new

`/services/data/{version}/connect/sales-excellence/actionable-list/assignment/${actionableListId}`

New request body: Assign Actionable List Input

New response body: Assign Actionable List

Consumer Goods Cloud

Get greater visibility into your business efficiency with the new Analytics for Consumer Goods - Advanced Data Model app. Capture customer-reported issues accurately and improve customer satisfaction by configuring the new mobile app domain in mobility framework. Additionally, set the default initial response in a picklist to empty or blank using the new attribute in Consumer Goods Modeler.

EDITIONS

Available in: Developer, Enterprise, Performance, and Professional editions.

IN THIS SECTION:

[Implement Trade Promotion Management Faster with MuleSoft Accelerator](#)

Integrate your baseline data easily and quickly from a middleware with CG Cloud Processing Service. Integrating the baseline data helps you to enhance your customer business planning processes.

[Track Performance Using Analytics for Consumer Goods - Advanced Data Model App](#)

Get greater visibility into your business efficiency by analyzing the performance of your products, product categories, brands, and assortments. Using the new Analytics for Consumer Goods - Advanced Data Model app, identify the high-performers in each segment, compare the performance to the previous year, and track the performance of newly launched products. Also, evaluate the effectiveness of a specific promotion in improving the performance of a product, category, brand, and assortment.

[Record Customer Tasks Accurately with the New Mobile App Domain](#)

With the new mobile app domain, your sales reps can now capture customer-reported issues accurately and improve customer satisfaction. You can show the correct classification options for a customer task on the Task UI of the Consumer Goods Offline Mobile app.

[Other Enhancements in Consumer Goods Cloud](#)

Learn about other small but important improvements to Consumer Goods Cloud.

[Changed Objects in Consumer Goods Cloud](#)

Do more with updated Consumer Goods Cloud objects.

Implement Trade Promotion Management Faster with MuleSoft Accelerator

Integrate your baseline data easily and quickly from a middleware with CG Cloud Processing Service. Integrating the baseline data helps you to enhance your customer business planning processes.

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

Track Performance Using Analytics for Consumer Goods - Advanced Data Model App

Get greater visibility into your business efficiency by analyzing the performance of your products, product categories, brands, and assortments. Using the new Analytics for Consumer Goods - Advanced Data Model app, identify the high-performers in each segment, compare the performance to the previous year, and track the performance of newly launched products. Also, evaluate the effectiveness of a specific promotion in improving the performance of a product, category, brand, and assortment.

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.

Record Customer Tasks Accurately with the New Mobile App Domain

With the new mobile app domain, your sales reps can now capture customer-reported issues accurately and improve customer satisfaction. You can show the correct classification options for a customer task on the Task UI of the Consumer Goods Offline Mobile app.

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.

How: When you configure your mobile app domain, map the customer task object, `Task__type`, to the new mobile app domain, `DomTaskType`.

If you're upgrading to Spring '23, import your domain configuration records by uploading the CSV files from Static Resources to Salesforce. Then make the new domain available in the Mobile App Picklist Repository of an upgraded instance by running the Picklist Attribute Mapping Batch process.

SEE ALSO:

[Salesforce Help: Additional Steps To Upgrade Managed Packages to Spring '23 \(can be outdated or unavailable during release preview\)](#)

Other Enhancements in Consumer Goods Cloud

Learn about other small but important improvements to Consumer Goods Cloud.

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

Configure Toggle Items to Set Initial Response as Blank

Now, you can set the default initial response in a picklist or toggle item, such as `LoQuestion`, as empty or blank by using the `allowInitialValueEmpty` attribute. Sales reps can select an appropriate option from the picklist to record a response to the activity question. Append the attribute to the dynamic type of list binding in the `SelectionBox` UI control section. For example,

```
<Binding target="SomeSelectionBox" type="Dynamic" allowInitialValueEmpty="true"
binding=".someToggleField" typeField="dataType" />
```

Changed Objects in Consumer Goods Cloud

Do more with updated Consumer Goods Cloud objects.

Get better performance on data replication to Consumer Goods Offline Mobile App by using these fields in

CP_Pricing_Condition:

Use the new `Replication_Account` and `Replication_Sales_Organization` fields.

SEE ALSO:

[Salesforce Help: Configure Replication Fields in CP_Pricing_Condition \(can be outdated or unavailable during release preview\)](#)

Financial Services Cloud

Improve efficiencies with automation and integration capabilities built in Financial Services Cloud.

IN THIS SECTION:

[Actionable Relationship Center](#)

Customize an ARC graph with enhancements to show fields from multiple objects, use OmniScripts and Flexcards, view ARC error messages for custom metadata changes, view ARC graphs vertically, and customize fields and action labels.

[Interaction Summaries](#)

Bankers can benefit from the latest enhancements to the Interaction Summaries feature. They can keep interactions data up-to-date, explore all accounts in an interaction in a single page, and use rich text formatting and a larger notes-taking canvas to capture notes more effectively.

[Data Consumption Framework in Financial Services Cloud](#)

Connect to core banking systems faster by using integrations built for scale.

[Discovery Framework in Financial Services Cloud](#)

Give your customers an improved user experience when filling in an assessment form.

[Integration Definitions](#)

Quickly set up integrations with different external endpoints and leverage the integration definitions across Salesforce Industries.

[Retail Banking and Wealth Management](#)

Get more insightful customer churn predictions by using features created based on customers' responses to surveys and on the sentiment behind the responses.

[Address Update Service Process](#)

Use the Service Process Studio to create a process for your users to update client addresses.

[Fee Reversal Service Process](#)

Use the Service Process Studio to create a process for your users to reverse fees on client accounts.

[Retail Banking](#)

See real-time financial account details and financial account transaction details.

[Actionable Segmentation \(Beta\)](#)

Segment similar client profiles and curate them, and design timely and personalized client outreach programs with Actionable Segmentation (beta).

[New and Changed Financial Services Cloud Object Fields](#)

Do more with new and updated Financial Services Cloud objects.

[New and Changed Tooling Objects in Financial Services Cloud](#)

The claim financial settings for insurance claim financial services.

Actionable Relationship Center

Customize an ARC graph with enhancements to show fields from multiple objects, use OmniScripts and Flexcards, view ARC error messages for custom metadata changes, view ARC graphs vertically, and customize fields and action labels.

IN THIS SECTION:

[Show Fields from Multiple Objects on an ARC Node](#)

On an ARC Graph node, you can now show fields from objects that have a lookup relationship to the node object. When configuring an ARC graph on the Display tab, you can add the objects and fields that have a lookup relationship to the node object. Previously, you showed only fields from the node object.

[Streamline Processes Using OmniScripts in an ARC Graph](#)

Give your users quick access to the actions and processes they do often by adding OmniScripts to your ARC nodes. OmniScripts offer a guided path for completing business processes and serve as a configurable way of creating a seamless experience for your users.

[Prevent Deletion of Custom Metadata Used in an ARC Graph](#)

Error handling now prevents you from deleting custom metadata used in an ARC graph. If you delete custom metadata referenced in an ARC graph, such as a custom object or label, your ARC graph no longer loads. Now, when you try to delete custom metadata, an error message appears preventing you from deleting the custom metadata, and telling you in which ARC graph the metadata is used.

[Include Custom Metadata When Packaging an ARC Graph](#)

When you package an ARC graph that contains custom metadata, such as custom objects or labels, all of the custom metadata is saved in the package. When you install the package into a different Salesforce org, the custom metadata is also installed.

[Customize ARC Nodes Using FlexCards](#)

Bring the power of FlexCards to your ARC graph. Using FlexCards, you're no longer limited in how your users view and interact with nodes on an ARC graph. In OmniStudio, the drag-and-drop elements let you build FlexCards quickly to show your users at-a-glance contextual information and provide them with access to relevant tasks for the data in an ARC graph.

[View ARC Graphs Vertically](#)

Customize the view of an ARC graph to show cards vertically. When you select Vertical Hierarchy, now your users can view new cards top to bottom when they interact with an ARC graph on a record page. The default graph view is Horizontal Hierarchy, which populates cards left to right.

[Customize Field Labels on an ARC Graph](#)

Show your users field labels that are most relevant to them by customizing the field label names. Custom field labels also save space on cards. For example, the field, Total Financial Accounts Primary Owner, on the Account object takes up a lot of space. Now you can shorten the label to fit better on the card.

Customize Action Labels in an ARC Graph

Show your users labels in the Action menu that are most relevant to them by customizing the action labels in an ARC graph. In the ARC graph builder, on the Actions tab, the section headings, such as Record Actions and Peer Record Actions, show you to which records the actions apply. These headings can be confusing to your users. Now you can customize them to labels that are relevant to your users.

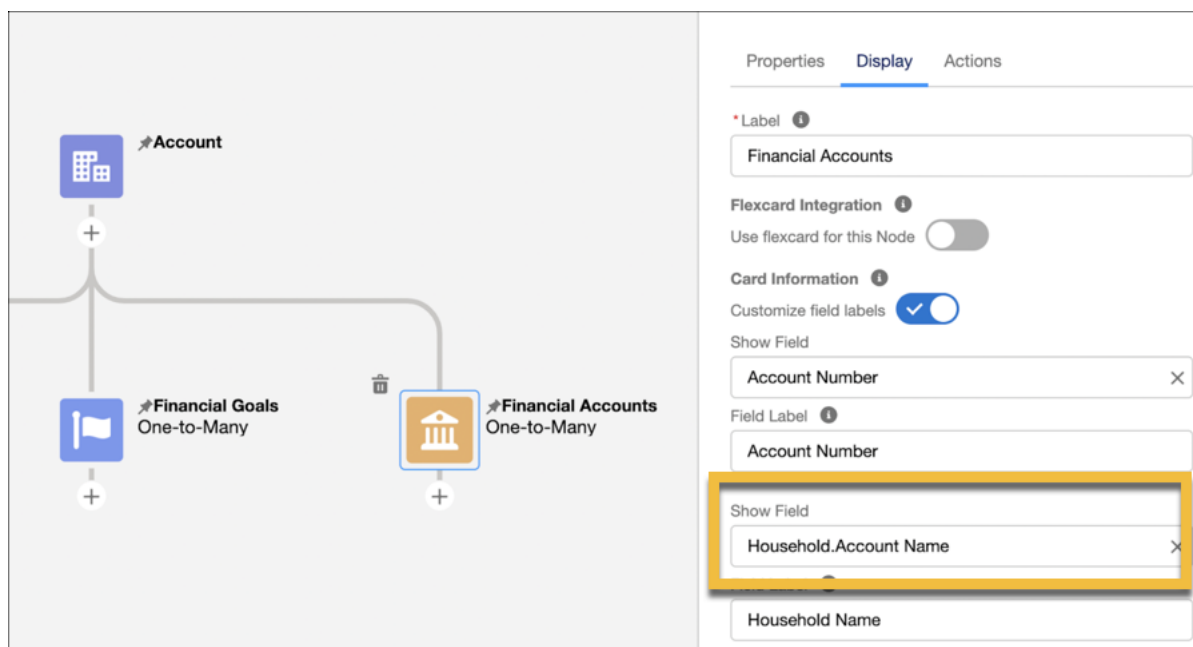
Show Fields from Multiple Objects on an ARC Node

On an ARC Graph node, you can now show fields from objects that have a lookup relationship to the node object. When configuring an ARC graph on the Display tab, you can add the objects and fields that have a lookup relationship to the node object. Previously, you showed only fields from the node object.

Where: This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

Who: To use this feature, users need the Financial Services Cloud Extension permission set.

Why: Customize your ARC graph nodes to show fields most relevant to your users. For example, create an ARC graph to show your users important details about the person account, and add a node that shows the financial accounts for the person. To show your users to which household each financial account is related, on the Financial Account node, select the **Household** object, and then select **Account Name**.



How: On an ARC graph, create a node or select an existing node. Ensure that the node object, such as Account, has a lookup relationship to other objects, such as Contact. Click the **Display** tab. In the show field picklist, select an object, such as Contact. In the list of fields, select a field from the object to show on the node, such as email address.

Streamline Processes Using OmniScripts in an ARC Graph

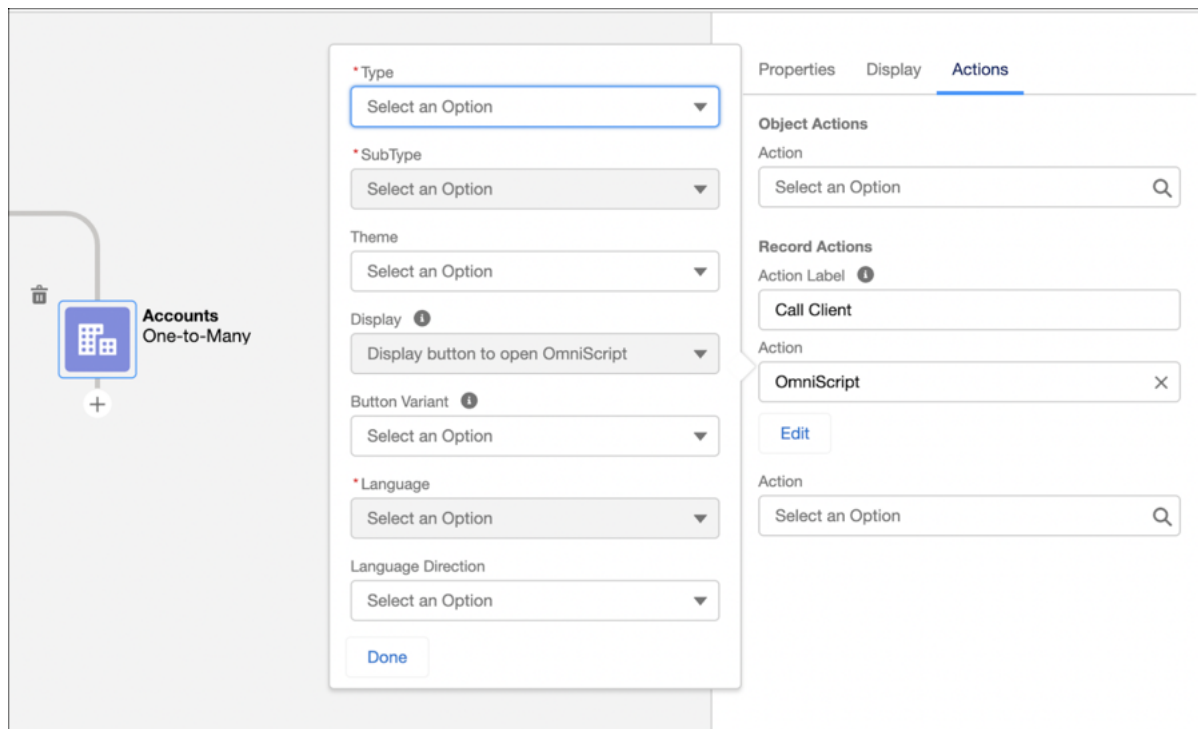
Give your users quick access to the actions and processes they do often by adding OmniScripts to your ARC nodes. OmniScripts offer a guided path for completing business processes and serve as a configurable way of creating a seamless experience for your users.

Where: This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

Who: To use this feature, users need the Financial Services Cloud Foundations or the Financial Services Cloud Extension permission set and OmniStudio User and OmniStudio Admin permission sets.

Why: Embed an OmniScript in an ARC graph to streamline day-to-day tasks for your users. For example, Financial Account Managers need quick access to updating household members. Create an OmniScript for adding a person account to a household and add it to a household node in your ARC graph.

How: In OmniStudio, configure an OmniScript. Then, in an ARC graph, on the Actions tab, select **OmniScript** in the Action menu. Configure the OmniScript and save your changes.



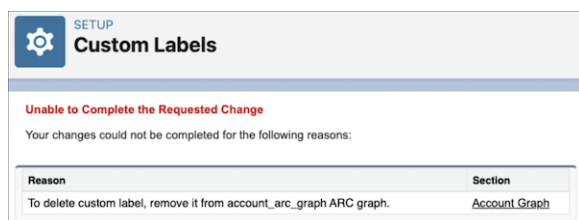
Prevent Deletion of Custom Metadata Used in an ARC Graph

Error handling now prevents you from deleting custom metadata used in an ARC graph. If you delete custom metadata referenced in an ARC graph, such as a custom object or label, your ARC graph no longer loads. Now, when you try to delete custom metadata, an error message appears preventing you from deleting the custom metadata, and telling you in which ARC graph the metadata is used.

Where: This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

When: Users need the Financial Services Cloud Extension permission set to use this feature.

Why: Error messages when deleting custom metadata used in an ARC graph prevent unnecessary Salesforce changes for companies with more than one Salesforce Admin. For example, if you create an ARC graph using the custom label, Case_Name, and add the label to an ARC graph, another Salesforce admin is prevented from deleting the custom label until the label is removed from the ARC graph. The delete restrictions exist for custom objects, labels, and actions. Custom fields can be deleted even if they are used in an ARC graph. If a custom field is deleted, the ARC graph still shows on the record page. However, that field is removed from the ARC graph builder and on the ARC graph on a record page.



How: In Setup, when you try to delete custom metadata that is referenced in an ARC graph, an error message is shown. To delete the custom metadata, delete the metadata from the ARC graph first.

Include Custom Metadata When Packaging an ARC Graph

When you package an ARC graph that contains custom metadata, such as custom objects or labels, all of the custom metadata is saved in the package. When you install the package into a different Salesforce org, the custom metadata is also installed.

Where: This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

When: To use this feature, users need the Financial Services Cloud Extension permission set.

Why: This time-saving feature lets you fully customize an ARC graph in one Salesforce org, and install it into another Salesforce org without recreating custom metadata. For example, if you're building an ARC graph in a sandbox org, you can create custom labels and add them to your ARC graph. When you package and install the ARC graph into your production org, all of the custom labels appear in the ARC graph.

Customize ARC Nodes Using FlexCards

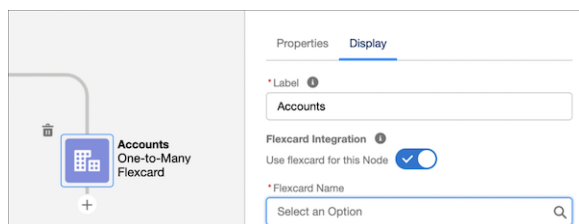
Bring the power of FlexCards to your ARC graph. Using FlexCards, you're no longer limited in how your users view and interact with nodes on an ARC graph. In OmniStudio, the drag-and-drop elements let you build FlexCards quickly to show your users at-a-glance contextual information and provide them with access to relevant tasks for the data in an ARC graph.

Where: This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

Who: To use this feature, users need the Financial Services Cloud Foundations or the Financial Services Cloud Extension permission set and OmniStudio User and OmniStudio Admin permission sets.

Why: FlexCards improve the experience of your users with client information. For example, show data from multiple data sources, actions that are relevant to the context of the card, and show more detail on demand with flyouts. Any component that you can add to a FlexCard to show on a record in Lightning App Builder can be added to an ARC node FlexCard.

How: In OmniStudio, create a FlexCard. Then, in Setup, edit an ARC graph and select a node. On the Display tab, select **Use flexcard for this Node** and select the FlexCard. When you show a node using a FlexCard, the other configuration options on the Display and Actions tabs are hidden.



View ARC Graphs Vertically

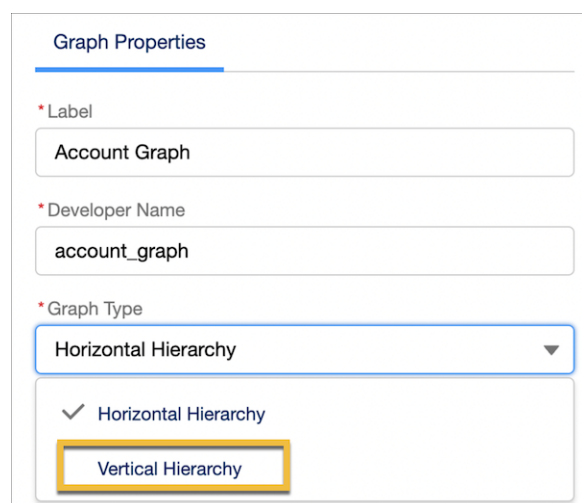
Customize the view of an ARC graph to show cards vertically. When you select Vertical Hierarchy, now your users can view new cards top to bottom when they interact with an ARC graph on a record page. The default graph view is Horizontal Hierarchy, which populates cards left to right.

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 an ARC graph vertically allows easier navigation to view large hierarchies, such as parent and account hierarchies, showing a full view of multiple lists on one screen.

How: In Setup, edit an existing ARC graph or create a new graph. On the Graph Properties tab, for Graph Type, select **Vertical Hierarchy**.



The screenshot shows the 'Graph Properties' configuration page. It includes three required fields: 'Label' (set to 'Account Graph'), 'Developer Name' (set to 'account_graph'), and 'Graph Type'. The 'Graph Type' dropdown menu is open, showing two options: 'Horizontal Hierarchy' (which is currently selected and has a checkmark) and 'Vertical Hierarchy' (which is highlighted with a yellow border, indicating it is the option to be selected).

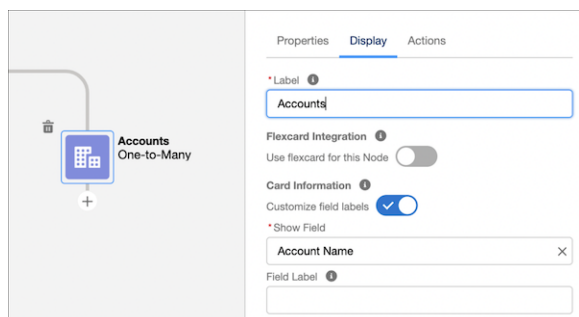
Customize Field Labels on an ARC Graph

Show your users field labels that are most relevant to them by customizing the field label names. Custom field labels also save space on cards. For example, the field, Total Financial Accounts Primary Owner, on the Account object takes up a lot of space. Now you can shorten the label to fit better on the card.

Where: This change applies to Lightning Experience in Professional, Enterprise, and Unlimited Editions where Financial Services Cloud is enabled.

Who: To use this feature, users need the Financial Services Cloud Extension permission set.

How: In Setup, edit an ARC graph and select a node. On the Display tab, select **Customize field labels**, and then customize the name of the field in Field Label.



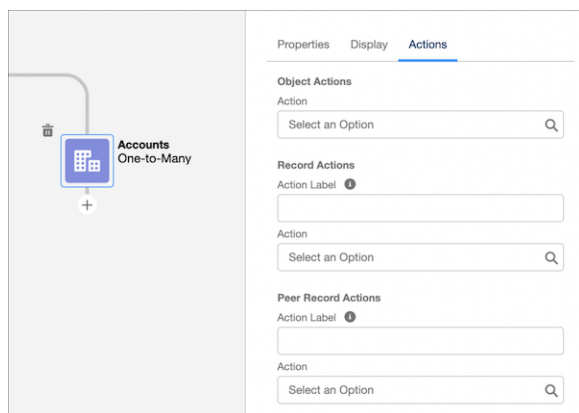
Customize Action Labels in an ARC Graph

Show your users labels in the Action menu that are most relevant to them by customizing the action labels in an ARC graph. In the ARC graph builder, on the Actions tab, the section headings, such as Record Actions and Peer Record Actions, show you to which records the actions apply. These headings can be confusing to your users. Now you can customize them to labels that are relevant to your users.

Where: This change applies to Lightning Experience in Professional, Enterprise, and Unlimited Editions where Financial Services Cloud is enabled.

Who: To use this feature, users need the Financial Services Cloud Extension permission set.

How: In Setup, edit an ARC graph and select a node. On the Actions tab, in the Action Label field, customize the name of the action section. You can customize the label for Record Actions, Junction Actions, and Peer Record Actions.



Interaction Summaries

Bankers can benefit from the latest enhancements to the Interaction Summaries feature. They can keep interactions data up-to-date, explore all accounts in an interaction in a single page, and use rich text formatting and a larger notes-taking canvas to capture notes more effectively.

IN THIS SECTION:

[Sync Interaction Data from Email and Calendar Applications by Using Einstein Activity Capture](#)

Keep interactions data in Salesforce up-to-date and prioritize interactions that drive deal flow. By using Einstein Activity Capture for Financial Services Cloud, you can automatically sync events from connected email and calendar applications to Salesforce as interaction and interaction attendee records.

[Get Interaction Summaries Up and Running With Ease](#)

Help bankers and financial advisors build and deepen customer relationships with the interaction summaries data model and Lightning components. A new guided setup walks you through setting up and configuring interaction summaries, configuring sharing settings for interaction summaries, and more.

[Explore Accounts Associated With an Interaction](#)

Use the new Interaction Related Account junction object to view all accounts for an interaction. Interaction Related Account is a junction between Interaction and Account objects. For each interaction, based on the interaction attendee details, the new junction automatically captures all accounts participating in that interaction. Then you can associate a role for each account, for example, Primary, Legal, or Audit.

[Capture Meeting Notes More Easily by Using the Rich Text Editor](#)

Bankers can enjoy an improved experience when taking notes for an interaction. Rich text formatting and a larger canvas make it easier to capture notes about an interaction.

Sync Interaction Data from Email and Calendar Applications by Using Einstein Activity Capture

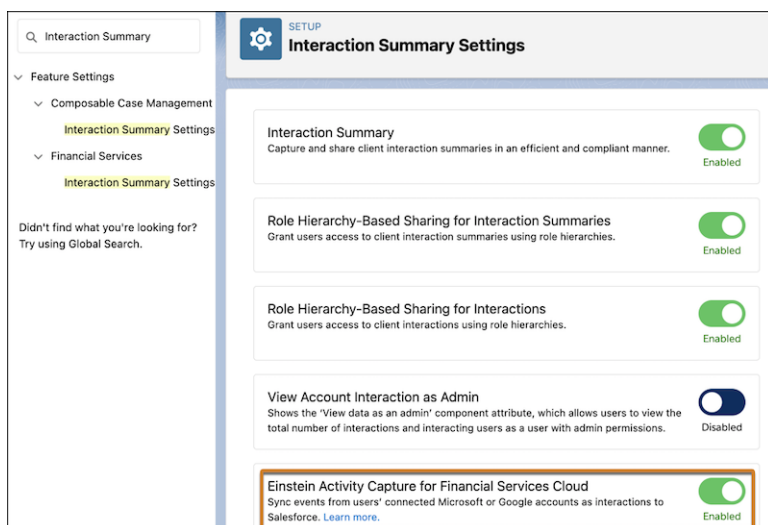
Keep interactions data in Salesforce up-to-date and prioritize interactions that drive deal flow. By using Einstein Activity Capture for Financial Services Cloud, you can automatically sync events from connected email and calendar applications to Salesforce as interaction and interaction attendee records.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Financial Services Cloud and Einstein Activity Capture are enabled.

Why: Using Einstein Activity Capture for Financial Services Cloud, your users can seamlessly sync interactions data and view interactions related to specific clients. They can automatically sync client meeting data from their calendars and capture call reports with minimum manual data entry.

How:

From Setup, in the Quick Find box, enter *Interaction Summary*, and then under Financial Services, select **Interaction Summary Settings**. Enable **Einstein Activity Capture for Financial Services Cloud**.

**SEE ALSO:**

[Enable Einstein Activity Capture for Financial Services Cloud \(can be outdated or unavailable during release preview\)](#)

[Review Considerations for Working With Einstein Activity Capture for Financial Services Cloud \(can be outdated or unavailable during release preview\)](#)

Get Interaction Summaries Up and Running With Ease

Help bankers and financial advisors build and deepen customer relationships with the interaction summaries data model and Lightning components. A new guided setup walks you through setting up and configuring interaction summaries, configuring sharing settings for interaction summaries, and more.

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.

Explore Accounts Associated With an Interaction

Use the new Interaction Related Account junction object to view all accounts for an interaction. Interaction Related Account is a junction between Interaction and Account objects. For each interaction, based on the interaction attendee details, the new junction automatically captures all accounts participating in that interaction. Then you can associate a role for each account, for example, Primary, Legal, or Audit.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Financial Services Cloud is enabled.

How: Add the Interaction Related Account related list to Interaction or Account page layouts.

SEE ALSO:

[Explore Accounts Associated With an Interaction \(can be outdated or unavailable during release preview\)](#)

[Enable and Configure Interaction Summaries \(can be outdated or unavailable during release preview\)](#)

[InteractionRelatedAccount \(can be outdated or unavailable during release preview\)](#)

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Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Financial Services Cloud is enabled.

SEE ALSO:

[Enable and Configure Interaction Summaries \(can be outdated or unavailable during release preview\)](#)

[Create an Interaction \(can be outdated or unavailable during release preview\)](#)

Data Consumption Framework in Financial Services Cloud

Connect to core banking systems faster by using integrations built for scale.

IN THIS SECTION:

[Connect to Core Banking Systems with Integrations Built for Scale](#)

With Data Consumption Framework, your agents can access complete and current data from external systems without leaving Salesforce. The framework extends the Continuations framework in FlexCards and OmniScripts by providing them with integration definition capabilities for better real-time performance. In addition, agents can use the framework to initiate asynchronous flows that call APIs at scale to support more simultaneous users.

Connect to Core Banking Systems with Integrations Built for Scale

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Where: This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

SEE ALSO:

[Connect to External Systems with Integrations Built for Scale](#)

Discovery Framework in Financial Services Cloud

Give your customers an improved user experience when filling in an assessment form.

IN THIS SECTION:

[Discovery Framework](#)

Adopt the new enhancements to the Discovery Framework feature to give your customers an improved user experience when filling in an assessment form. Easily build and configure forms with the new QR code or Signature Discovery Framework OmniScript elements. Create forms with prefilled data from previous assessments and cut down the time needed to fill in an assessment.

Discovery Framework

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Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Financial Services Cloud is enabled.

SEE ALSO:

[Discovery Framework \(can be outdated or unavailable during release preview\)](#)

Integration Definitions

Quickly set up integrations with different external endpoints and leverage the integration definitions across Salesforce Industries.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Financial Services Cloud and Standard OmniStudio Runtime are enabled.

SEE ALSO:

[Integration Definitions](#)

Retail Banking and Wealth Management

Get more insightful customer churn predictions by using features created based on customers' responses to surveys and on the sentiment behind the responses.

IN THIS SECTION:

[Improve Churn Prediction Accuracy for Retail Banking Customers](#)

Get more insightful customer churn predictions by using features that are based on customer satisfaction (CSAT) and Net Promoter Score (NPS) survey responses and the sentiment behind these responses. To reduce customer churn, and increase loyalty and spend, focus on customers who are likely to churn.

[Improve Churn Prediction Accuracy for Wealth Management Customers](#)

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Get more insightful customer churn predictions by using features that are based on customer satisfaction (CSAT) and Net Promoter Score (NPS) survey responses and the sentiment behind these responses. To reduce customer churn, and increase loyalty and spend, focus on customers who are likely to churn.

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. The Feedback Management & Sentiment Insights Features template is available to users with the Feedback Management - Starter or Feedback Management - Growth license, and the Sentiment Insights license.

How: Go to CRM Analytics Studio, and then create your app:

- To create example and prediction sets (training and scoring sets) with Feedback Management and Sentiment Insights features, create an app by using the Feedback Management & Sentiment Insights Features template.
- To predict customer churn, create an app by using the Customer Churn Risk for Retail Banking template and use it instead of the existing app created with the same template.

The Churn Prediction for Retail Banking Customers dashboard shows more insightful details of customers who are likely to churn based on prediction scores.

SEE ALSO:

[Financial Services Cloud Administrator Guide: Retail Banking Customer Churn Predictions Using Feedback Management and Sentiment Insight Features \(can be outdated or unavailable during release preview\)](#)

Improve Churn Prediction Accuracy for Wealth Management Customers

Get more insightful customer churn predictions by using features that are based on customer satisfaction (CSAT) and Net Promoter Score (NPS) survey responses and the sentiment behind these responses. To reduce customer churn, and increase loyalty and spend, focus on customers who are likely to churn.

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. The Feedback Management & Sentiment Insights Features template is available to users with the Feedback Management - Starter or Feedback Management - Growth license, and the Sentiment Insights license.

How: Go to CRM Analytics Studio, and then create your app:

- To create example and prediction sets (training and scoring sets) with Feedback Management and Sentiment Insights features, create an app by using the Feedback Management & Sentiment Insights Features template.
- To predict customer churn, create an app by using the Customer Churn Risk for Wealth Management template and use it instead of the existing app created with the same template.

The Churn Prediction for Wealth Management Customers dashboard shows more insightful details of customers who are likely to churn based on prediction scores.

SEE ALSO:

[Financial Services Cloud Administrator Guide: Wealth Management Customer Churn Predictions Using Feedback Management and Sentiment Insight Features \(can be outdated or unavailable during release preview\)](#)

Address Update Service Process

Use the Service Process Studio to create a process for your users to update client addresses.

IN THIS SECTION:

[Streamline Client Address Updates Using Service Process Studio](#)

Let your users seamlessly update customer addresses with the Address Update service process. Use the Service Process Studio to configure the Address Update service process to give your users an easy-to-follow process for updating client addresses.

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Where: This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

Who: To use the Address Update Service Process, users need Industries Service Process, Industries Service Excellence, OmniStudio, Document Checklist, Rule Engine Runtime, and Financial Services Cloud Extension, or Financial Services Cloud Basic, or Financial Services Cloud Standard Permission Set Licenses.

Why: Use the Address Update service process to streamline address updates for your users. For example, when a client moves from one home to another, they contact your customer service department to ensure their banking details are up to date. Using the Service Process Studio, your customer service representatives gather client address details in an intake form. After completing an approval process for the client address change, the address details are updated in Salesforce and across multiple core banking systems.

How:

- In Setup, connect to MuleSoft and create an Integration Definition.
- Clone the Address Update Salesforce flow and add your Integration Definition.
- Create an Address Update Service Process Definition and make note of the API name.
- Add the API name to the Address Update OmniScript, Salesforce Flow, and FlexCard.
- Create a Decision Matrix and Expression Set to provide a list of document types that a user can request from a client to validate the client's new address.
- Add the Address Update OmniScript to your Action Launcher and add the Action Launcher to the person account record page layout.
- Confirm and activate the Address Update service process definition.

SEE ALSO:

[Streamline Updating Client Addresses Using Service Process Studio](#)
[Service Process Studio](#)

Fee Reversal Service Process

Use the Service Process Studio to create a process for your users to reverse fees on client accounts.

IN THIS SECTION:

[Reverse Fees for Clients Using Fee Reversal Service Process](#)

When clients dispute a fee on their financial account, your users can now reverse fees using the Fee Reversal service process. Use the Service Process Studio to configure the Fee Reversal service process. You can streamline the workflow to select an available transaction and require validation for the fee reversal request through a multi-process orchestration. You can also define policies for fee waivers to ensure your users are objective when deciding to waive fees.

Reverse Fees for Clients Using Fee Reversal Service Process

When clients dispute a fee on their financial account, your users can now reverse fees using the Fee Reversal service process. Use the Service Process Studio to configure the Fee Reversal service process. You can streamline the workflow to select an available transaction and require validation for the fee reversal request through a multi-process orchestration. You can also define policies for fee waivers to ensure your users are objective when deciding to waive fees.

Where: This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

Who: To use the Fee Reversal service process, users need Industries Service Process, Industries Service Excellence, OmniStudio, and Financial Services Cloud Extension, or Financial Services Cloud Basic, or Financial Services Cloud Standard Permission Set Licenses.

Why: Use the Fee Reversal service process to streamline reversing client fees for your users. For example, when a client has an unexpected charge on their bank account, they contact your customer service department to help reverse the fee. Your customer service representatives gather client details in an intake form. After completing an approval process for the client's fee reversal request, the fee is reversed in Salesforce and the core banking system.

How:

- In Setup, connect to MuleSoft and create an Integration Definition.
- Clone the Fee Reversal Salesforce flow and add your Integration Definition.
- In Service Process Studio, create a Fee Reversal Service Process Definition and make note of the API name.
- Add the Fee Reversal Service Process Definition to the OmniScript, Salesforce Flow, and FlexCard.
- Add the Fee Reversal OmniScript to your Action Launcher and add the Action Launcher to the person account record page layout.
- Confirm and activate the Fee Reversal service process definition.

SEE ALSO:

[Reverse Fees on Client Accounts Using Service Process Studio](#)
[Service Process Studio](#)

Retail Banking

See real-time financial account details and financial account transaction details.

IN THIS SECTION:

[View Real-Time Account and Financial Account Information in Salesforce](#)

Get real-time updates for a client's financial account details and transaction details. Using the Data Consumption Framework, connect Salesforce to your core banking system via MuleSoft. Enhancements to the FSCFinancialAccountsSummary, FSCFinancialAccountDetails, and FSCFinancialAccountTransactionDetails components include refreshing the financial account and transaction details, and searching and filtering for transactions.

View Real-Time Account and Financial Account Information in Salesforce

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Where: This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

Who: To use this feature, users need the Financial Services Cloud Extension permission set.

How: In Setup, enable the setting Turn On Real-Time Financial Account Information Enable and connect Salesforce to Mulesoft. Create integration definitions for financial account details and financial account transaction details.

SEE ALSO:

[Financial Services Cloud Administrator Guide: Provide a Comprehensive View of Customers' Financial Account Details \(can be outdated or unavailable during release preview\)](#)

Actionable Segmentation (Beta)

Segment similar client profiles and curate them, and design timely and personalized client outreach programs with Actionable Segmentation (beta).



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

IN THIS SECTION:

[Enable Sales Executives to Build Actionable Lists \(Beta\)](#)

Actionable list definitions and actionable lists are the key elements of the Actionable Segmentation (beta) feature. Actionable list definitions enable you to create datasets containing records having information across multiple related objects according to your business requirements. Actionable lists help you to create and curate meaningful client segments filtering on datasets associated with actionable list definitions. For example, if you plan to socialize a wealth plan designed for high net worth individuals in the Bay area, create an actionable list of high net worth individuals and plan your outreach initiatives.

[Improve Your Sales Team's Success with Actionable List Members \(Beta\)](#)

In Lightning App Builder, add the Actionable List Members component to help sales agents determine which prospects to contact first. To further enhance prospect engagement, let list creators assign an OmniScript for providing guidance to sales agents.

[Help Your Sales Agents Reach Their Targets with an Outreach List \(Beta\)](#)

Provide your sales agents with a prioritized and consolidated list of prospects, including existing customers, who they can contact. In the navigation menu, make the new Outreach List tab available for sales agents.

[Improve Engagement Abilities of Your Sales Teams \(Beta\)](#)

Provide your sales agents timely and contextual guidance on prospect outreach and promotion of products and services. In Lightning App Builder, add the Actionable List Engagement component to the Account or Contact record page.

Enable Sales Executives to Build Actionable Lists (Beta)

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Where: This feature is available in Lightning Experience in Enterprise and Unlimited editions where Financial Services Cloud Growth license is enabled.



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

Who: To use this feature, users need the Industries Sales Excellence add-on with Actionable Segmentation permission set.


SEE ALSO:

[Actionable Segmentation \(Beta\)](#)

Improve Your Sales Team's Success with Actionable List Members (Beta)

In Lightning App Builder, add the Actionable List Members component to help sales agents determine which prospects to contact first. To further enhance prospect engagement, let list creators assign an OmniScript for providing guidance to sales agents.

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SEE ALSO:

[Actionable List Engagement \(Beta\)](#)

New and Changed Financial Services Cloud Object Fields

Do more with new and updated Financial Services Cloud objects.

Insurance

Configure settings for the Insurance Claim Financial Services.

Use the new `ClaimFinancialSettings` object.

The maximum monetary amount a user can authorize for a given financial type and product.

Use the new `UserFinancialAuthority` object.

Specify the financial authority status of a claim.

Use the new `FinancialAuthorityStatus` field of the `Claim` object.

Interaction Summary

Explore Accounts Associated With an Interaction

Use the new `InteractionRelatedAccount` junction object.

New and Changed Tooling Objects in Financial Services Cloud

The claim financial settings for insurance claim financial services.

Configure the claim financial settings for insurance claim financial services

Use the new `ClaimFinancialSettings` object.

Health Cloud

Health Cloud has new features to help engage better with patients and provide improved care services. Integrated Care Management introduces a new care plan solution that supports assessments and action plans. Virtual Care connects with more participants and has improved moderation capabilities. The Contact Center for Health Cloud app helps agents verify caller identities and quickly resolve questions. Crisis support counselors can use the Crisis Support Center Management app to help their clients with mental and behavioral crises. Utilization Management streamlines authorization request submissions with support for concurrent reviews and enhanced business rules. Advanced Therapy Management supports partial rescheduling for appointments in a series.

IN THIS SECTION:

[Integrated Care Management](#)

Help your care managers create more comprehensive care plans and provide their patients with a higher level of care by using Integrated Care Management in Health Cloud. Integrated Care Management gives you a new care plan solution, built directly on the core Salesforce platform. Unlike with the older care plans feature, there is no dependency on the Health Cloud managed package.

[Contact Center for Health Cloud](#)

Address a member's concerns quickly and securely using the 360 degree member view in the new contact center. Verify a caller's identity and capture engagement details. View engagement events and topics on the timeline, glance through the member's health data in the advanced patient card, deploy pre-configured actions from the Action Launcher, and check insurance-related information in the Member Plan.

[Crisis Support Center Management](#)

Make it easy for your users to provide crisis support services to clients by using the new Crisis Support Center Management app. Answer calls using Open CTI Softphone integrated with the app and record call participants, engagement topics, and duration of calls. Quickly capture notes and view a client's complete engagement history on the Timeline component. Easily share provider contact information and Knowledge articles with clients via email and phone call. Launch frequently-used assessments and actions directly from the case record page.

[Advanced Therapy Management Enhancements](#)

Easily perform a partial reschedule of appointment slots. Get a detailed view of the enrollee count in advanced therapies. Also Book New Slots, Reschedule Slots, and Cancel Slots button visibility rules have been updated. The guided setup for Advanced Therapy Management has a new section that helps you quickly configure field-level security settings.

Virtual Care

Let's get everyone on the call! Virtual care now connects more people in a highly secure video calling environment. Configure multiple AWS region types to choose the location of your healthcare data and use robust moderation feature to let only the right people into a call.

Intelligent Appointment Management

Schedulers now have expanded functionality in the Intelligent Appointment Management console to find the best appointment for a patient.

Utilization Management Enhancements

Deliver a connected platform for payers and providers to collaborate that allows for uninterrupted information exchange, and enhances payers' and providers' ability to make quick, informed decisions about authorization requests. Health Cloud's Utilization Management includes new and enhanced OmniStudio components and business rules that help users to manage authorization requests more efficiently. Reduce decision time by gathering information all from one place, optimize cost of care, and foster smoother collaboration between the payers and providers handling authorization requests.

Health Cloud for Life Sciences

We're bringing more features to Health Cloud for Life Sciences to help your company engage more meaningfully with its customers and patients.

Intelligent Document Automation

Simplify the document management process, reduce manual data entry, and get patients the right care and services faster by managing patient and member forms all in one place, from intake through processing. Differentiate record types of uploaded documents to get the most accurate automation results.

Identity Verification Enhancements

Customer service representatives and contact center agents now have more options to verify the identities of their customers.

Action Launcher

You can now search for and launch a flow orchestration from Action Launcher to quickly resolve customer requests. Configure up to 10 frequently used actions to shorten response time. Select deployments easily from a filtered list in Lightning App Builder based on the object record page you're editing.

Unified Health Scoring Enhancements

We've made it easier for you to get started with Unified Health Scoring by using the new Salesforce Customer Data Platform data kit for Unified Health Scoring.

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 Summer '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.

Health Cloud Has New and Changed Objects

Access more data through these new and changed Health Cloud objects

New Salesforce Healthcare APIs

Health Cloud includes new Healthcare API that can interact with any system that utilizes Fast Healthcare Interoperability Resources (FHIR) API.

Connect REST API

Integrate mobile apps, intranet sites, and third-party web applications with Salesforce using Health Cloud Connect REST API.

New Health Cloud Metadata Types

Make the most of the new metadata types of Health Cloud.

[MuleSoft Direct for Health Cloud](#)

Integrate Health Cloud with external systems by using MuleSoft Direct for Health Cloud that offers a connectivity solution to process industry-standard integrations. MuleSoft Direct for Health Cloud rapidly integrates and synchronizes data and processes from multiple systems such as Electronic Health Record (EHR), provider, or payer systems into an industry-standard format to power connected experiences.

[Intelligent Sales Sample Flows for Field Inventory Management](#)

Efficiently and accurately manage your medical device inventories and cycle counts by using Intelligent Sales Sample Flows for Field Inventory Management. Quickly capture and fulfill product requests, keep track of inventory for serialized products, and meet regulatory compliance. The flows are available from mobile devices, making it easy for sales representatives to perform important tasks on-the-go. After deploying the sample flows into Salesforce, you can customize them to meet your unique business needs.

Integrated Care Management

Help your care managers create more comprehensive care plans and provide their patients with a higher level of care by using Integrated Care Management in Health Cloud. Integrated Care Management gives you a new care plan solution, built directly on the core Salesforce platform. Unlike with the older care plans feature, there is no dependency on the Health Cloud managed package.

Integrated Care Management includes a FHIR R4 and USCDI-aligned data model to make your care management data interoperable. And integrations with Discovery Framework (Assessments), OmniStudio, and Action Plans provide crucial capabilities that greatly improve the care plan experience for your care managers and their patients.



Note: If you already have an existing Health Cloud subscription, you need to reprovision the Health Cloud Add-On license before you can use Integrated Care Management.

IN THIS SECTION:

[Create Care Plans Using a Guided OmniScript Flow](#)

The new guided OmniScript flow in Integrated Care Management helps care managers walk through the process of creating a care plan. Within the flow, care managers can select a patient's assessments and get problem, goal, and intervention recommendations based on the patient's responses. The flow includes a Save for Later option, so care managers can take a break while creating a care plan and pick things up later.

[Build a Library of Reusable Definitions and Care Plan Templates](#)

Help care managers to quickly create common types of care plans by setting up a reusable library of templates and definitions. These libraries help to reduce the number of records in Salesforce and maintain data consistency across records.

[Get Recommendations When Creating Care Plans](#)

Care managers can use assessments compatible with Integrated Care Management to gather health information from patients. When a care manager creates a care plan using these assessments, they see recommendations for problems, goals, and interventions based on the patient's assessment responses. These recommendations reduce the amount of research care managers must complete when creating a care plan and help reduce the likelihood of manually-introduced errors.

[Create Dependent Intervention Tasks with Action Plan Templates](#)

Use Action Plan Templates to define tasks that users can perform only after a dependent task is complete. These tasks can be defined at the intervention, goal, problem, or care plan levels. Creating dependencies between tasks ensures that care teams don't accidentally miss any assignments and reduces the likelihood of manually-introduced errors.

[Customize Integrated Care Management by Using OmniStudio](#)

The Integrated Care Management user interfaces and processes are built using OmniStudio. You can customize these pages and processes to meet your organization's needs.

Create Care Plans Using a Guided OmniScript Flow

The new guided OmniScript flow in Integrated Care Management helps care managers walk through the process of creating a care plan. Within the flow, care managers can select a patient's assessments and get problem, goal, and intervention recommendations based on the patient's responses. The flow includes a Save for Later option, so care managers can take a break while creating a care plan and pick things up later.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions of Salesforce provisioned with Health Cloud.

How: In the Lightning App Builder, place the `IndustriesHCCarePlanManager` FlexCard on the patient record page. Care managers can then launch the OmniScript flow by clicking **Create Care Plan**.

Build a Library of Reusable Definitions and Care Plan Templates

Help care managers to quickly create common types of care plans by setting up a reusable library of templates and definitions. These libraries help to reduce the number of records in Salesforce and maintain data consistency across records.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions of Salesforce provisioned with Health Cloud.

Why: Definitions are used to instantiate Health Condition, Goal Assignment, and Task records for problems, goals, and interventions. These definitions contain basic information, such as descriptions and codes, that is carried over to the instantiated records. Templates define the hierarchical structure of problems, goals, and interventions in care plans.

How: Create records for these objects.

- Problem Definition - The definition for problems instantiated as Health Condition records
- Goal Definition - The definition for goals instantiated as Goal Assignment records
- Problem Goal Definition - The junction that connects goal definitions with their parent problem definitions
- Action Plan Template - The set of intervention tasks related to a common goal, problem, or care plan
- Action Plan Template Assignment - The junction that connects an action plan template with its parent goal definition or problem definition
- Care Plan Template - The template that represents a care plan
- Care Plan Template Problem - The template that represents the hierarchy of a problem in a care plan
- Care Plan Template Goal - The template that represents the hierarchy of a goal in either a care plan or a problem

Get Recommendations When Creating Care Plans

Care managers can use assessments compatible with Integrated Care Management to gather health information from patients. When a care manager creates a care plan using these assessments, they see recommendations for problems, goals, and interventions based on the patient's assessment responses. These recommendations reduce the amount of research care managers must complete when creating a care plan and help reduce the likelihood of manually-introduced errors.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions of Salesforce provisioned with Health Cloud.

How: Use the Discovery Framework to create an Assessment that uses single select or multi-select questions. Then, map the choices defined in those questions to recommendations using the Assessment Question Response Recommendation object. Finally, set up a decision table based on the Assessment Question Response Recommendation object.

Create Dependent Intervention Tasks with Action Plan Templates

Use Action Plan Templates to define tasks that users can perform only after a dependent task is complete. These tasks can be defined at the intervention, goal, problem, or care plan levels. Creating dependencies between tasks ensures that care teams don't accidentally miss any assignments and reduces the likelihood of manually-introduced errors.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions of Salesforce provisioned with Health Cloud.

How: Create an action plan template with Goal Assignment, Health Condition, or Care Plan as the target object. Then, create a prerequisite task and mark it as required. Finally, create the dependent task and select the task you previously created as a prerequisite.

Action Plan Template
Weight Reduction Intervention

Status: Draft Created By: Admin User Created Date: Jan 18, 2023 Let users add items to action plans: ☐

Items Details

Tasks Reorder New Task

SUBJECT	PREREQUISITES	PRIORITY	DAYS TO COMPLETE	ASSIGNED TO	REQUIRED	REMINDER TIME
Run 2 miles every day		Normal	7	Charles Green	<input checked="" type="checkbox"/>	
Run 5 miles every day	Run 2 miles every day	Normal	14	Charles Green	<input type="checkbox"/>	

Document Checklist Items

NAME	DOCUMENT TYPE	INSTRUCTIONS	REQUIRED
You don't have any document checklist item in this template. Create a new item to get started.			

New Document Checklist Item

Customize Integrated Care Management by Using OmniStudio

The Integrated Care Management user interfaces and processes are built using OmniStudio. You can customize these pages and processes to meet your organization's needs.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions of Salesforce provisioned with Health Cloud.

How: Use OmniStudio to modify the required FlexCards, DataRaptors, Integration Procedures, and OmniScripts. Learn more about OmniStudio customizations in Salesforce Help and Trailhead.

Important: Ensure that you're knowledgeable about FlexCards, DataRaptors, Integration Procedures, and OmniScripts before you attempt to make changes in OmniStudio.

Contact Center for Health Cloud

Address a member's concerns quickly and securely using the 360 degree member view in the new contact center. Verify a caller's identity and capture engagement details. View engagement events and topics on the timeline, glance through the member's health data in the advanced patient card, deploy pre-configured actions from the Action Launcher, and check insurance-related information in the Member Plan.

IN THIS SECTION:

[Capture Call Details in Real Time in the Contact Center](#)

Enable contact center agents to receive members' calls in the contact center with Open Computer Telephony Integration (CTI) Softphone. The Open CTI Softphone collects a caller's data and passes it to Salesforce to retrieve member records. The contact center agent sees the member data in the Identity Verification flow, and can capture call details and verify the caller's identity, all in real time.

[Verify the Caller's Identity in the Contact Center](#)

Help contact center agents promptly validate a caller's identity and capture relevant engagement information. With the help of Open CTI Softphone integration with the Contact Center, contact center agents can receive calls from members or their representatives and simultaneously verify the caller's identity using the Verify Customer Identity flow.

[Monitor the Progress of a Member's Engagement in the Contact Center](#)

Easily track the status and progression of a member engagement in the Engagement Interaction tab. View fields configured for each stage and make edits when necessary.

[Track Contact Center Activities on the Timeline](#)

Glance through past interactions, topics, and cases on the Contact Center's timeline component. Quickly add new Engagement Interaction, Engagement Topic, and Case records directly from the timeline.

[View Critical Patient and Member Data in the Contact Center](#)

To ensure that you have critical information at hand, the Contact Center includes the Advanced Patient Card, Profile Card, and Member Plan Card. View basic contact information about a patient in the profile card. Read through the patient's health history and create health records from the patient card itself. Glance at the list of member plans and individual member plan details in the Member Plan Card.

[Deploy Quick Actions from Action Launcher in the Contact Center](#)

Quickly perform frequently used actions like resetting the password or adding patient's medication from the Contact Center using the Action Launcher component.

[Get Alerts for Changes in Records in the Contact Center](#)

Make sure you never miss out on important member information with Record Alerts in the Contact Center. Get warning, error, or informational notifications for changes in records that require your attention. View the record alert to get more information, or dismiss and snooze the notification from the app.

[View and Create Knowledge Articles in the Contact Center](#)

Conduct a quick search with keywords and pull up relevant knowledge articles and frequently asked questions (FAQs) in the Contact Center. Add new topics and how-tos about existing member plans or new insurance policies, and share the resources with your members or partners.

Capture Call Details in Real Time in the Contact Center

Enable contact center agents to receive members' calls in the contact center with Open Computer Telephony Integration (CTI) Softphone. The Open CTI Softphone collects a caller's data and passes it to Salesforce to retrieve member records. The contact center agent sees the member data in the Identity Verification flow, and can capture call details and verify the caller's identity, all in real time.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions of Salesforce provisioned with the Health Cloud Add-On license.

Who: This feature is available to users who are assigned the Contact Center for Health Cloud permission set, Contact Center for Health Cloud permission set license, Health Cloud Foundation permission set, and Health Cloud Platform permission set license. Users must also have the Manage Call Center user permission.

How: First, configure the Open CTI Softphone in Setup. Then, add contact center agents as call center users. To view the app, set the Contact Center as the app default.

SEE ALSO:

[Salesforce Help: Open CTI Softphone for the Contact Center](#)

[Salesforce Help: Receive Calls from Members Through Open CTI Softphone](#)

Verify the Caller's Identity in the Contact Center

Help contact center agents promptly validate a caller's identity and capture relevant engagement information. With the help of Open CTI Softphone integration with the Contact Center, contact center agents can receive calls from members or their representatives and simultaneously verify the caller's identity using the Verify Customer Identity flow.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions of Salesforce provisioned with the Health Cloud Add-On license.

Who: This feature is available to users who are assigned the Contact Center for Health Cloud permission set, Contact Center for Health Cloud permission set license, Health Cloud Foundation permission set, and Health Cloud Platform permission set license.

How: First enable the admin settings for Identity Verification. Then add read, create, and edit access to the Engagement Interaction, Engagement Topic, and Engagement Attendee objects.

When you receive a call through Open CTI Softphone, the Verify Customer Identity flow automatically opens in the Engagement Interaction tab. Enter the reason for the call and confirm if the caller is the member or someone else. Verify identification details of the member using account, account number, and phone number or postal code. The verification creates a record in the Engagement Interaction object.

SEE ALSO:

[Salesforce Help: Identity Verification and Engagement Details in the Contact Center](#)

[Salesforce Help: Verify the Member's Identity and Capture Engagement Details in the Contact Center](#)

Monitor the Progress of a Member's Engagement in the Contact Center

Easily track the status and progression of a member engagement in the Engagement Interaction tab. View fields configured for each stage and make edits when necessary.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions of Salesforce provisioned with the Health Cloud Add-On license.

Who: This feature is available to users who are assigned the Contact Center for Health Cloud permission set, Contact Center for Health Cloud permission set license, Health Cloud Foundation permission set, and Health Cloud Platform permission set license.

How: First add read, create, and edit access to the Engagement Interaction, Engagement Topic, and Engagement Attendee objects.

To view the status progression, configure path settings for Engagement Interactions. From Setup, go to Path Settings, and create an engagement interaction path.

SEE ALSO:

[Salesforce Help: Configure Path Settings For Engagement Interactions in Contact Center](#)

[Salesforce Help: View the Status of an Engagement in the Contact Center](#)

Track Contact Center Activities on the Timeline

Glance through past interactions, topics, and cases on the Contact Center's timeline component. Quickly add new Engagement Interaction, Engagement Topic, and Case records directly from the timeline.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions of Salesforce provisioned with the Health Cloud Add-On license.

Who: This feature is available to users who are assigned the Contact Center for Health Cloud permission set, Contact Center for Health Cloud permission set license, Health Cloud Foundation permission set, and Health Cloud Platform permission set license.

How: First enable the admin settings for the Contact Center app, and then enable the admin settings for the Timeline. To view the app, set the Contact Center app as the app default.

SEE ALSO:

[Salesforce Help: Enhanced Timeline for the Contact Center](#)

[Salesforce Help: Track Interaction Events on the Contact Center's Timeline](#)

View Critical Patient and Member Data in the Contact Center

To ensure that you have critical information at hand, the Contact Center includes the Advanced Patient Card, Profile Card, and Member Plan Card. View basic contact information about a patient in the profile card. Read through the patient's health history and create health records from the patient card itself. Glance at the list of member plans and individual member plan details in the Member Plan Card.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions of Salesforce provisioned with the Health Cloud Add-On license.

Who: This feature is available to users who are assigned the Contact Center for Health Cloud permission set, Contact Center for Health Cloud permission set license, Health Cloud Foundation permission set, and Health Cloud Platform permission set license, and the OmniStudio User permission set, and the OmniStudio User permission set license.

How: The Profile Card, the Advanced Patient Card, and the Member Plan Card are all available without any setup in the Contact Center. To view the app, enable the admin settings for the Contact Center and set the Contact Center as the app default.

SEE ALSO:

[Salesforce Help: Profile Card and Member Plan FlexCards for Contact Center](#)

[Salesforce Help: View Profile Details and Member Plan Information in the Contact Center](#)

Deploy Quick Actions from Action Launcher in the Contact Center

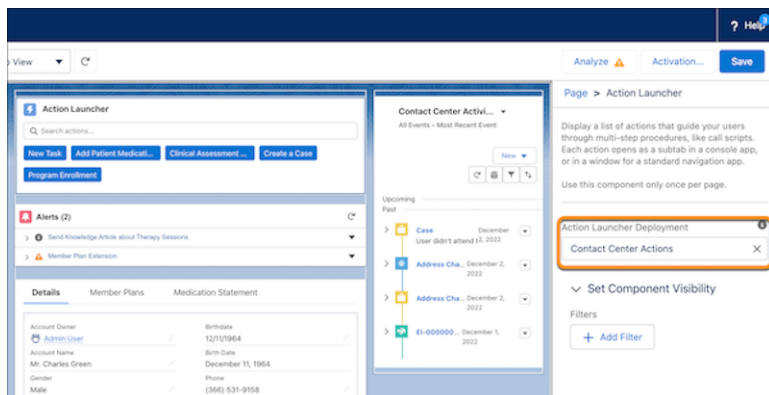
Quickly perform frequently used actions like resetting the password or adding patient's medication from the Contact Center using the Action Launcher component.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions of Salesforce provisioned with the Health Cloud Add-On license.

Who: This feature is available to users who are assigned the Contact Center for Health Cloud permission set, Contact Center for Health Cloud permission set license, Health Cloud Foundation permission set, and Health Cloud Platform permission set license.

How: The Action Launcher is available without any setup in the Contact Center. To view the app, enable the admin settings for the Contact Center and set the Contact Center as the app default.

Configure a deployment, with Account as the object, in Setup. Open the Contact Center in Lightning App Builder, and add the new deployment to the Action Launcher Deployment field.



SEE ALSO:

[Salesforce Help: Action Launcher for the Contact Center](#)

[Salesforce Help: Launch a Quick Action in the Contact Center](#)

Get Alerts for Changes in Records in the Contact Center

Make sure you never miss out on important member information with Record Alerts in the Contact Center. Get warning, error, or informational notifications for changes in records that require your attention. View the record alert to get more information, or dismiss and snooze the notification from the app.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions of Salesforce provisioned with the Health Cloud Add-On license.

Who: This feature is available to users who are assigned the Contact Center for Health Cloud permission set, Contact Center for Health Cloud permission set license, Health Cloud Foundation permission set, and Health Cloud Platform permission set license.

How: First add read, create, and edit access to the Record Alerts object.

To view the app, enable the admin settings for the Contact Center and set the Contact Center as the app default.

To configure which records trigger alerts, in the App Launcher, find and select Record Alerts. Create a record with start and end dates, and add it to a member's account record. Add a severity value to indicate the nature of the alert.

SEE ALSO:

[Salesforce Help: Record Alerts in the Contact Center](#)

[Salesforce Help: Review Alerts in the Contact Center](#)

View and Create Knowledge Articles in the Contact Center

Conduct a quick search with keywords and pull up relevant knowledge articles and frequently asked questions (FAQs) in the Contact Center. Add new topics and how-tos about existing member plans or new insurance policies, and share the resources with your members or partners.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions of Salesforce provisioned with the Health Cloud Add-On license and the Knowledge User Add-On license.

Who: This feature is available to users who are assigned the Contact Center for Health Cloud permission set, Contact Center for Health Cloud permission set license, Health Cloud Foundation permission set, and Health Cloud Platform permission set license. Also add the Knowledge LSF Permission Set.

How: Knowledge Articles are available without any setup in the Contact Center. To view the app, enable the admin settings for the Contact Center and set the Contact Center as the app default. Then, add users who create knowledge articles in Lightning Knowledge Setup.

From the object manager settings for Knowledge in Setup, create a record type and assign it to the Knowledge Layout.

In the App Launcher, find and select **Contact Center**. In the Knowledge component, click **New Article** to create an FAQ or a knowledge topic. Use the search bar to look for existing topics you can share with your members.

SEE ALSO:

[Salesforce Help: Enable Users to Create Knowledge Articles in the Contact Center](#)

[Salesforce Help: Create Knowledge Articles in the Contact Center](#)

Crisis Support Center Management

Make it easy for your users to provide crisis support services to clients by using the new Crisis Support Center Management app. Answer calls using Open CTI Softphone integrated with the app and record call participants, engagement topics, and duration of calls. Quickly capture notes and view a client's complete engagement history on the Timeline component. Easily share provider contact information and Knowledge articles with clients via email and phone call. Launch frequently-used assessments and actions directly from the case record page.

IN THIS SECTION:

[Specify Client Details With a Simplified Intake Flow](#)

When you receive a call, use the client intake flow to quickly enter basic client details. Search for and select an existing account, or create a new person account for the client.

[Evaluate Clients and Identify Risks by Using Screening Assessments](#)

Gain a better understanding of the mental and behavioral state of clients using assessments such as the Intake Assessment and Immediate Risk Assessment.

[View Engagement History on the Enhanced Timeline Component](#)

Track details of past client interactions with a comprehensive, chronological view on the Crisis Support Center Management App timeline. You can also create Engagement Interaction, Engagement Topic, and Case records directly from the timeline.

[Quickly Capture Important Information Using Notes](#)

Capture relevant observations and details shared by a client during a call, and record a summary after a call has ended by using Notes.

[Find and Share Provider Details With Clients](#)

Help clients receive the holistic care they need by using the Provider Search component to search for relevant healthcare providers based on criteria such as location and specialty. Then, share provider details via email.

[Quickly Deploy Actions Using Action Launcher](#)

Find and launch frequently used assessments and actions right from the case record page, using the Action Launcher component.

[Create and Share Knowledge Articles With Clients](#)

Support your clients by creating and publishing articles in the Knowledge component. Search for relevant articles using keywords, and share the resources via email or a phone call.

Specify Client Details With a Simplified Intake Flow

When you receive a call, use the client intake flow to quickly enter basic client details. Search for and select an existing account, or create a new person account for the client.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions of Salesforce provisioned with the Health Cloud license and Health Cloud Add-On license.

Who: This feature is available to users who are assigned the Health Cloud Crisis Support Center Management App permission set, Health Cloud Crisis Support Center Management permission set license, Health Cloud Foundation permission set, and Health Cloud Platform permission set license. Users also need OmniStudio User permission set and OmniStudio User permission set license.

How: The intake flow automatically opens in the Engagement Interaction tab when you accept a call using Open CTI integrated with the Crisis Support Center Management app.

SEE ALSO:

[Salesforce Help: Intake Flow and Engagement Interaction for Crisis Support Center Management](#)

[Salesforce Help: Use the Intake Flow to Capture Client Details](#)

Evaluate Clients and Identify Risks by Using Screening Assessments

Gain a better understanding of the mental and behavioral state of clients using assessments such as the Intake Assessment and Immediate Risk Assessment.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions of Salesforce provisioned with the Health Cloud license and Health Cloud Add-On license.

Who: This feature is available to users who are assigned the Health Cloud Crisis Support Center Management App permission set, Health Cloud Crisis Support Center Management permission set license, and Health Cloud Foundation permission set.

How: Enable OmniStudio and Discovery Framework to access Assessments.

View Engagement History on the Enhanced Timeline Component

Track details of past client interactions with a comprehensive, chronological view on the Crisis Support Center Management App timeline. You can also create Engagement Interaction, Engagement Topic, and Case records directly from the timeline.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions of Salesforce provisioned with the Health Cloud license and the Health Cloud Add-On license.

Who: This feature is available to users who are assigned the Health Cloud Crisis Support Center Management App permission set, Health Cloud Crisis Support Center Management permission set license, Health Cloud Foundation permission set, and Health Cloud Platform permission set license.

How: Enable the admin settings for the Crisis Support Center Management app. Then, enable the admin settings for Timeline.

SEE ALSO:

[Salesforce Help: Enable Enhanced Timeline for Crisis Support Center Management App](#)

[Salesforce Help: Track Client Interactions on the Crisis Support Center Management App Timeline](#)

Quickly Capture Important Information Using Notes

Capture relevant observations and details shared by a client during a call, and record a summary after a call has ended by using Notes.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions of Salesforce provisioned with the Health Cloud license and the Health Cloud Add-On license.

Who: This feature is available to users who are assigned the Health Cloud Crisis Support Center Management App permission set, Health Cloud Crisis Support Center Management permission set license, Health Cloud Foundation permission set, and Health Cloud Platform permission set license.

How: Enable Notes in Setup and add the Notes related list to the Case object page layout.

SEE ALSO:

[Salesforce Help: Enable and Configure Notes for Crisis Support Center Management](#)

[Salesforce Help: Quickly Capture Notes in Crisis Support Center Management](#)

Find and Share Provider Details With Clients

Help clients receive the holistic care they need by using the Provider Search component to search for relevant healthcare providers based on criteria such as location and specialty. Then, share provider details via email.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions of Salesforce provisioned with the Health Cloud license and the Health Cloud Add-On license.

Who: This feature is available to users who are assigned the Health Cloud Crisis Support Center Management App permission set, Health Cloud Crisis Support Center Management permission set license, Health Cloud Foundation permission set, and Health Cloud Platform permission set license.

How: Make sure Provider Search is enabled and that data about practitioners, facilities, and their relationships is set up correctly.

SEE ALSO:

[Salesforce Help: Enable Provider Search for Crisis Support Center Management](#)

[Salesforce Help: Find Provider Details in Crisis Support Center Management](#)

Quickly Deploy Actions Using Action Launcher

Find and launch frequently used assessments and actions right from the case record page, using the Action Launcher component.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions of Salesforce provisioned with the Health Cloud license and the Health Cloud Add-On license.

Who: This feature is available to users who are assigned the Health Cloud Crisis Support Center Management App permission set, Health Cloud Crisis Support Center Management permission set license, Health Cloud Foundation permission set, and Health Cloud Platform permission set license.

How: Configure a deployment with frequently used assessments and actions and add it to the Case object in Setup. Open the case record page in Lightning App Builder and select the new deployment in component properties.

SEE ALSO:

[Salesforce Help: Action Launcher for Crisis Support Center Management](#)

[Salesforce Help: Easily Access Actions in Crisis Support Center Management](#)

Create and Share Knowledge Articles With Clients

Support your clients by creating and publishing articles in the Knowledge component. Search for relevant articles using keywords, and share the resources via email or a phone call.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions of Salesforce provisioned with the Health Cloud license and the Health Cloud Add-On license.

Who: This feature is available to users who are assigned the Health Cloud Crisis Support Center Management App permission set, Health Cloud Crisis Support Center Management permission set license, Health Cloud Foundation permission set, Health Cloud Platform permission set license, and Knowledge LSF permission set.

How: Use Lightning Knowledge Setup to set up Knowledge in your org. Authorize users to create articles and configure record types from the object management settings for Knowledge.

SEE ALSO:

[Salesforce Help: Enable Users to Create Knowledge Articles for Crisis Support Center Management](#)

[Salesforce Help: Create Knowledge Articles for Clients in Crisis Support Center Management](#)

Advanced Therapy Management Enhancements

Easily perform a partial reschedule of appointment slots. Get a detailed view of the enrollee count in advanced therapies. Also Book New Slots, Reschedule Slots, and Cancel Slots button visibility rules have been updated. The guided setup for Advanced Therapy Management has a new section that helps you quickly configure field-level security settings.

IN THIS SECTION:

[Perform Partial Rescheduling for Advanced Therapies](#)

You no longer need to reschedule the entire series of appointments if a single appointment slot is unavailable. With partial rescheduling, you can reschedule appointments for all work types except the first, and consecutive slots are rescheduled accordingly based on lead time. To accommodate emergencies, the lead time restriction for the rescheduled work type is removed so that you can move the rescheduled appointment slot to an earlier time if necessary.

[Visibility Updates for Appointment Slot Buttons in Advanced Therapy Management](#)

The Book New Slots button is now only visible when there are no active service appointment groups, either because they have a Canceled status or no appointments are scheduled. Alternatively, the Reschedule Slots and Cancel Slots buttons are visible only for active service appointment groups with Awaiting Approval, Scheduled, and None statuses.

[Track Enrollee Count in Advanced Therapies in More Detail](#)

As an admin, you can facilitate billing processes and help your org make a more informed decision about purchasing additional licenses to onboard enrollees. Track usage-based entitlement for a detailed view of the count of patients enrolled in advanced therapies in your org. View start and end dates of your contract, how frequently the allowance is reset, the current allowance, the amount used, and usage data.

[Guided Setup Update in Advanced Therapy Management](#)

Advanced Therapy Management's guided setup has a new section to help you configure field-level security for the Maximum Appointment field in the Time Slot object.

Perform Partial Rescheduling for Advanced Therapies

You no longer need to reschedule the entire series of appointments if a single appointment slot is unavailable. With partial rescheduling, you can reschedule appointments for all work types except the first, and consecutive slots are rescheduled accordingly based on lead time. To accommodate emergencies, the lead time restriction for the rescheduled work type is removed so that you can move the rescheduled appointment slot to an earlier time if necessary.

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 licenses.

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. Users also need the Asset Scheduler Add-On License.

How: First, add the Appointment Slots Lightning App Builder component to an enrollee record page.

On the care program enrollee record page, click **Reschedule Slots** next to a slot chain. Select the work type to reschedule. Enter search criteria to find alternative appointment times.

SEE ALSO:

[Salesforce Help: What is Partial Rescheduling in Advanced Therapy?](#)

[Salesforce Help: Partially Reschedule Appointment Slots for an Advanced Therapy](#)

Visibility Updates for Appointment Slot Buttons in Advanced Therapy Management

The Book New Slots button is now only visible when there are no active service appointment groups, either because they have a Canceled status or no appointments are scheduled. Alternatively, the Reschedule Slots and Cancel Slots buttons are visible only for active service appointment groups with Awaiting Approval, Scheduled, and None statuses.

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 licenses.

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. Users also need the Asset Scheduler Add-On License.

How: To view the buttons, add the Appointment Slots Lightning App Builder component to an enrollee record page.

SEE ALSO:

[Salesforce Help: Visibility for Buttons in Appointment Slot Component](#)

Track Enrollee Count in Advanced Therapies in More Detail

As an admin, you can facilitate billing processes and help your org make a more informed decision about purchasing additional licenses to onboard enrollees. Track usage-based entitlement for a detailed view of the count of patients enrolled in advanced therapies in your org. View start and end dates of your contract, how frequently the allowance is reset, the current allowance, the amount used, and usage data.

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 licenses.

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. Users also need the Asset Scheduler Add-On License.

How: From Setup, go to Company Information. Under Usage-Based Entitlements, view details for Health Cloud: Maximum Care Program Enrollees in Advanced Therapy.

SEE ALSO:

[Salesforce Help: Keep Track of the Total Number of Patients Enrolled in Advanced Therapies](#)

Guided Setup Update in Advanced Therapy Management

Advanced Therapy Management's guided setup has a new section to help you configure field-level security for the Maximum Appointment field in the Time Slot object.

How: From Setup, find and select **Multi-Step Scheduling**. Go to the Configure Field-Level Security Settings section.

SEE ALSO:

[Salesforce Help: Turn on Field-Level Security for Time Slots](#)

Virtual Care

Let's get everyone on the call! Virtual care now connects more people in a highly secure video calling environment. Configure multiple AWS region types to choose the location of your healthcare data and use robust moderation feature to let only the the right people into a call.

IN THIS SECTION:

[Include Multiple Participants in a Virtual Call](#)

Invite more people into the conversation! Coordinate patient care among providers or discuss care with a patient's family members by having up to eight participants into a virtual call.

[Meet Data Protection Requirements for Virtual Care by Using AWS Regions](#)

Virtual calls configuration now includes the ability to select multiple regions to meet your relevant security, data storage, and government requirements. To support customers in countries where data localization requirements apply, Amazon Chime SDK media and data regions can be chosen separately from the Amazon Chime control regions.

[Improved Moderation for Virtual Care](#)

Moderators have an interface with a list of participant information and can choose to allow or deny participants access to the call. Badges in the Virtual Call player alert moderators to waiting participants.

Include Multiple Participants in a Virtual Call

Invite more people into the conversation! Coordinate patient care among providers or discuss care with a patient's family members by having up to eight participants into a virtual call.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Health Cloud is provisioned with the Video Calls add on license. Virtual calls are currently only available to customers in Australia, Spain, United Kingdom, and the United States. Enabling Virtual Calls requires a separate Amazon account.

Who: Virtual Care is available to moderators who are assigned the Health Cloud Foundation license and the Health Cloud Video Calls permission set.

How: For Salesforce users, From the App Launcher, find and select **Service Appointment**. Add additional video participants as new assigned resources to the service appointment. For Experience Cloud users instruct them to share the email invite with their guests.

SEE ALSO:

[Salesforce Help: Add Users to a Multi-Participant Call](#)

Meet Data Protection Requirements for Virtual Care by Using AWS Regions

Virtual calls configuration now includes the ability to select multiple regions to meet your relevant security, data storage, and government requirements. To support customers in countries where data localization requirements apply, Amazon Chime SDK media and data regions can be chosen separately from the Amazon Chime control regions.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Health Cloud is provisioned with the Video Calls add on license. Virtual calls are currently only available to customers in Australia, Spain, United Kingdom, and the United States. Enabling Virtual Calls requires a separate Amazon account.

Who: Administering Virtual Care requires the Health Cloud Foundation and Video Calls permission sets.

How: From Setup, in the Quick Find box, enter *Video Call Configuration*, then select **Video Call Configuration**. Select the appropriate regions for your company in the AWS Video Region, AWS API Endpoint Region, and AWS Video Waiting Room and Messaging Region fields.

SEE ALSO:

[Salesforce Help: AWS Region Setting Guidelines](#)

[Salesforce Help: Configure Video Visits](#)

Improved Moderation for Virtual Care

Moderators have an interface with a list of participant information and can choose to allow or deny participants access to the call. Badges in the Virtual Call player alert moderators to waiting participants.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Health Cloud is provisioned with the Video Calls add on license. Virtual calls are currently only available to customers in Australia, Spain, United Kingdom, and the United States. Enabling Virtual Calls requires a separate Amazon account.

Who: These features are available to moderators who are assigned the Health Cloud Foundation license and the Health Cloud Video Calls permission set.

How: As a moderator, select the Video Call component in the utility bar. Start the video appointment and the moderation interface appears along with the video call player.

SEE ALSO:

[Salesforce Help: Virtual Care Self Service](#)

Intelligent Appointment Management

Schedulers now have expanded functionality in the Intelligent Appointment Management console to find the best appointment for a patient.

IN THIS SECTION:[Use Appointment Guidance to Choose the Best Appointment](#)

Choosing the perfect appointment for a patient can be difficult. Create a custom screen flow to launch in the Intelligent Appointment Management console that guides your call center operators or care coordinators when setting a patient appointment.

[Expanded Search Functionality in Intelligent Appointment Management](#)

The Intelligent Appointment Management console now includes the ability to filter on engagement types, such as video, phone or in person, and to turn off the distance filter for virtual appointments. There's also now support for filtering providers using the Business License, Languages Spoken, and Provider Gender fields.

[Use Engagement Channels with Intelligent Appointment Management](#)

Give providers the flexibility to take appointments from anywhere and define when they're available on video, in person, or by phone. Care coordinators and call center agents can filter by engagement channel in the Intelligent Appointment Management console to find the perfect appointment for a patient. The distance filter is turned off for phone and video appointments.

[Self-Scheduling Enhancements for Intelligent Appointment Management](#)

The Intelligent Appointment Management self-scheduling feature now includes support for patients to filter by the provider's languages spoken and gender.

Use Appointment Guidance to Choose the Best Appointment

Choosing the perfect appointment for a patient can be difficult. Create a custom screen flow to launch in the Intelligent Appointment Management console that guides your call center operators or care coordinators when setting a patient appointment.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Health Cloud is enabled.

Who: Intelligent Appointment Management is available to users with the Data Pipelines Base User and Health Cloud Appointment Management permission sets.

How: Create a custom screen flow and enter the flow name for the appointment guidance field in the Healthcare Appointment Management component. The answers to the flow questions set filters in the intelligent appointment management console and shows the best appointment slots.

SEE ALSO:

[Salesforce Help: Configure Appointment Guidance](#)

[Salesforce Help: Considerations for Appointment Guidance Flow](#)

Expanded Search Functionality in Intelligent Appointment Management

The Intelligent Appointment Management console now includes the ability to filter on engagement types, such as video, phone or in person, and to turn off the distance filter for virtual appointments. There's also now support for filtering providers using the Business License, Languages Spoken, and Provider Gender fields.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Health Cloud is enabled.

Who: Intelligent Appointment Management is available to users with the Health Cloud Appointment Management permission set.

How: Make the Intelligent Appointment Management console available to call center operators or care coordinators by adding a tab to the patient account layout.

SEE ALSO:

[Salesforce Help: Configure Intelligent Appointment Management Console](#)

Use Engagement Channels with Intelligent Appointment Management

Give providers the flexibility to take appointments from anywhere and define when they're available on video, in person, or by phone. Care coordinators and call center agents can filter by engagement channel in the Intelligent Appointment Management console to find the perfect appointment for a patient. The distance filter is turned off for phone and video appointments.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Health Cloud is enabled. Salesforce Scheduler is available in Health Cloud for an additional cost. Engagement channels are only fully supported for customers using Salesforce Scheduler as the scheduling engine.

Who: Intelligent Appointment Management is available to Health Cloud users with Appointment Management and OmniStudio User permissions.

How: On the Salesforce Scheduler Settings page, in the Schedule Appointments Using Engagement Channels section, complete the prerequisites. Then enable Schedule Appointments Using Engagement Channels. Add the Intelligent Appointment Management console to a page and make it available to care coordinators and call center agents.

SEE ALSO:

[Salesforce Help: Enable Shifts for Channel Support in Intelligent Appointment Management](#)

Self-Scheduling Enhancements for Intelligent Appointment Management

The Intelligent Appointment Management self-scheduling feature now includes support for patients to filter by the provider's languages spoken and gender.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Health Cloud is enabled.

Who: Intelligent Appointment Management self-scheduling is available to Health Cloud Customer Community Users and Health Cloud Customer Community Plus Users with OmniStudio User and Health Cloud Appointment Self-Service permissions.

How: Set up Provider Relationship Cards to show the Languages Spoken and Gender fields. Make the Intelligent Appointment Management self-scheduling OmniScript available to patients on Experience Cloud.

SEE ALSO:

[Salesforce Help: Configure Intelligent Appointment Management Console](#)

Utilization Management Enhancements

Deliver a connected platform for payers and providers to collaborate that allows for uninterrupted information exchange, and enhances payers' and providers' ability to make quick, informed decisions about authorization requests. Health Cloud's Utilization Management includes new and enhanced OmniStudio components and business rules that help users to manage authorization requests more efficiently. Reduce decision time by gathering information all from one place, optimize cost of care, and foster smoother collaboration between the payers and providers handling authorization requests.

IN THIS SECTION:

[Improve Patient Care with Concurrent Reviews](#)

Evaluate authorization requests and ensure that members continue to get timely and cost-effective care by performing in-depth concurrent reviews during the course of a member's treatment. By conducting comprehensive concurrent reviews, your users can verify the member's plan, track health progress, and evaluate medical resource consumption. Your users can then determine the necessity of new requested services and make informed decisions to extend ongoing services.

[Streamline Submission of Authorization Requests](#)

Improved guided user interaction—built on OmniStudio—helps to reduce administrative delays for your intake specialists so that they can easily create and submit authorization requests. FHIR Da Vinci Health Record Exchange aligned Prior Authorization API and FHIR R4-aligned data model promote interoperability and smooth information exchange for your payer users.

[Speed up Approval Processes with Enhanced Business Rules](#)

Enhance operational efficiencies and expedite authorization request reviews by using updated business rules and logic for member eligibility checks and automatic approval. Use the upgraded, predefined expression set templates and define decision matrices to take advantage of automatic rule-based validation, which reduces administrative errors and cuts down on repetitive authorization request workflow tasks.

[Utilization Management Solution for Providers](#)

Provider users can now use Utilization Management to deliver timely care to patients by gathering necessary clinical information from the Electronic Health Record (EHR) system and successfully establishing a connection with the payer system to submit authorization requests.

Improve Patient Care with Concurrent Reviews

Evaluate authorization requests and ensure that members continue to get timely and cost-effective care by performing in-depth concurrent reviews during the course of a member's treatment. By conducting comprehensive concurrent reviews, your users can verify the member's plan, track health progress, and evaluate medical resource consumption. Your users can then determine the necessity of new requested services and make informed decisions to extend ongoing services.

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 the **HealthCloudUMConcurrentReviewLaunch** FlexCard. No action is required to set the visibility rules as they're predefined based on Request Type equals Inpatient - Physical Health Review or Outpatient - Physical Health Review.

Your intake coordinator can now see the **Create Concurrent Review** action button, which launches the HealthCloudUM/AuthorizationRequest OmniScript process.

SEE ALSO:

[Salesforce Help: Authorization Request Process Setup for Payers](#)

[Salesforce Help: Configure Action Buttons for Processing Authorization Request Reviews](#)

[Salesforce Help: Create and Submit Authorization Requests for Review](#)

Streamline Submission of Authorization Requests

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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 the **HealthCloudUMPriorAuthIntakeLaunch** FlexCard.

Your intake coordinator can now see the **Add Authorization Request Details** action button, which launches the HealthCloudUM/AuthorizationRequest OmniScript process.

SEE ALSO:

[Salesforce Help: Authorization Request Process Setup for Payers](#)

[Salesforce Help: Configure Action Buttons for Processing Authorization Request Reviews](#)

[Salesforce Help: Create and Submit Authorization Requests for Review](#)

Speed up Approval Processes with Enhanced Business Rules

Enhance operational efficiencies and expedite authorization request reviews by using updated business rules and logic for member eligibility checks and automatic approval. Use the upgraded, predefined expression set templates and define decision matrices to take advantage of automatic rule-based validation, which reduces administrative errors and cuts down on repetitive authorization request workflow tasks.

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 decision matrices named **HealthCloudUM_DocsChecklist**, **NeedAssessmentRuleIndividualPlanConditions**, **NeedAssessmentRuleGroupPlanConditions**, and **HealthCloudUM_AutoApproval** with the necessary input and output columns.

Clone these predefined expression set templates, then save and activate them as expression sets with the same name:

HealthCloudUM_AutoApproval, **HealthCloudUM_DocsChecklist**, and **HealthCloudUM_NeedAssessment**.

SEE ALSO:

[Salesforce Help: Authorization Request Process Setup for Payers](#)

[Salesforce Help: Automate Workflows with Predefined Rules](#)

[Salesforce Help: Manage Authorization Requests](#)


Utilization Management Solution for Providers

Provider users can now use Utilization Management to deliver timely care to patients by gathering necessary clinical information from the Electronic Health Record (EHR) system and successfully establishing a connection with the payer system to submit authorization requests.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions of Health Cloud where person accounts and Health Cloud: Utilization Management for providers org permission are enabled.

Who: This feature is available to users who have the Health Cloud Utilization Management, Utilization Management Provider User, OmniStudio Admin, and OmniStudio User permission sets.

Why: Utilization Management's seamless integration with external systems using FHIR Da Vinci Health Record Exchange aligned, industry-specific APIs, MuleSoft, and OmniStudio components, provides the tools necessary for providers to navigate the complex authorization process.

 **Note:** The user interface for providers to process the authorization requests will be supported in future releases.

SEE ALSO:

[Salesforce Help: Authorization Request Process Flow in a Provider's Office](#)

[Salesforce Help: Authorization Request Process Setup for Providers](#)

[Salesforce Developer Guide: Industry Integrations](#)

Health Cloud for Life Sciences

We're bringing more features to Health Cloud for Life Sciences to help your company engage more meaningfully with its customers and patients.

IN THIS SECTION:

[Improve Customer and Patient Engagement with Events and Milestones](#)

Give your users greater insight into their customers and patients, and help them engage more meaningfully with them, with the Events and Milestones lightning component. This component shows a filterable sequence of the important milestones and events in a person's or company's lifetime, such as a company's acquisition or a person's childbirth.

Improve Customer and Patient Engagement with Events and Milestones

Give your users greater insight into their customers and patients, and help them engage more meaningfully with them, with the Events and Milestones lightning component. This component shows a filterable sequence of the important milestones and events in a person's or company's lifetime, such as a company's acquisition or a person's childbirth.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Health Cloud for Life Sciences is enabled.

How: Using the Lightning App Builder, place the Events and Milestones component on an Account record page. The component header is named Life Events when you view a person account record, and Business Milestones when you view a business account record.

Intelligent Document Automation

Simplify the document management process, reduce manual data entry, and get patients the right care and services faster by managing patient and member forms all in one place, from intake through processing. Differentiate record types of uploaded documents to get the most accurate automation results.

IN THIS SECTION:

[Support for Picture Identification Document Type in Intelligent Document Automation](#)

As part of your patient enrollment, it is common to ask for an identification with a photo. Now you can more accurately extract data with Intelligent Document Automation for this type of identification.

[Map Different Record Types with Intelligent Document Automation](#)

A new patient enrollment often starts with a stack of completed paperwork and identification cards. Now in a single upload you can upload multiple document types. Now you can upload and classify up to eight documents in a single upload document workflow.

Support for Picture Identification Document Type in Intelligent Document Automation

As part of your patient enrollment, it is common to ask for an identification with a photo. Now you can more accurately extract data with Intelligent Document Automation for this type of identification.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Health Cloud is enabled.

Who: Intelligent Document Automation is available to users with Health Cloud Foundation and Document Checklist permissions.

Why: Classifying the uploaded document as a photo identification enables an automation that works better for photo reading.

How: From Setup, find and select **Document Type**. Create a new document type and select **Identity Document** as the form type. Users can now select this document type when uploading new documents.

SEE ALSO:

[Salesforce Help: Enable AnalyzeID for Photo Identification](#)

Map Different Record Types with Intelligent Document Automation

A new patient enrollment often starts with a stack of completed paperwork and identification cards. Now in a single upload you can upload multiple document types. Now you can upload and classify up to eight documents in a single upload document workflow.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Health Cloud is enabled.

Who: This change applies to Lightning Experience in Enterprise and Unlimited editions where Health Cloud is enabled.

How: From the App Picker, click **Received Documents**. Click **Upload Documents** and find the file. Click **Add File** to upload and categorize additional documents.

SEE ALSO:

[Salesforce Help: Document Automation Transform](#)

Identity Verification Enhancements

Customer service representatives and contact center agents now have more options to verify the identities of their customers.

IN THIS SECTION:

[Verify Customer Identity over Messages](#)


Help your customer service representatives and contact center agents engage more effectively with customers who prefer messages as their mode of communication. Agents can now verify the identities of customers with in-app messages or web chats using the new Messaging Session functionality in Identity Verification.

Verify Customer Identity over Messages

Help your customer service representatives and contact center agents engage more effectively with customers who prefer messages as their mode of communication. Agents can now verify the identities of customers with in-app messages or web chats using the new Messaging Session functionality in Identity Verification.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Health Cloud is enabled.

How: Set up Omni-Channel for in-app and web messaging. Assign the Messaging User permission set to users of in-app and web messaging. Create and customize the Messaging Session Lightning record page and add the identity verification flow to it.

 **Important:** Only use messaging mediums that are HIPAA-compliant.

SEE ALSO:

[Salesforce Help: Set Up Messaging for In-App and Web](#)

Action Launcher

You can now search for and launch a flow orchestration from Action Launcher to quickly resolve customer requests. Configure up to 10 frequently used actions to shorten response time. Select deployments easily from a filtered list in Lightning App Builder based on the object record page you're editing.

IN THIS SECTION:

[Assist Customers Quickly with Flow Orchestration in Action Launcher](#)

Enable contact center agents to launch flow orchestrations directly from Action Launcher and provide prompt customer service.

[Boost Response Time with Frequently Used Actions](#)

Help your contact center agents work faster by showing them up to ten frequently used actions on the Action Launcher. These frequently used actions help agents resolve repetitive requests by reducing the number of clicks and removing the need to run searches.

[Set Up Action Launcher Faster with Filtered Deployment Lists](#)

The Action Launcher deployments you see when configuring a page are automatically filtered based on the record type of the page. This filtered view helps you find the right deployments easier by reducing the clutter in your list of deployments.

Assist Customers Quickly with Flow Orchestration in Action Launcher

Enable contact center agents to launch flow orchestrations directly from Action Launcher and provide prompt customer service.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Health Cloud is enabled.

How: On the Action Launcher page in Setup, create a deployment by selecting the Flows and quick actions checkbox. Then, select the associated flow orchestrations to include in Action Launcher. Next, add the Action Launcher component to a Lightning record page in Lightning App Builder and configure it with the deployment you created.

Boost Response Time with Frequently Used Actions

Help your contact center agents work faster by showing them up to ten frequently used actions on the Action Launcher. These frequently used actions help agents resolve repetitive requests by reducing the number of clicks and removing the need to run searches.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Health Cloud is enabled.

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, select up to 10 frequently used actions to show your users.

Set Up Action Launcher Faster with Filtered Deployment Lists

The Action Launcher deployments you see when configuring a page are automatically filtered based on the record type of the page. This filtered view helps you find the right deployments easier by reducing the clutter in your list of deployments.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Health Cloud is enabled.

How: This feature is automatically enabled for you.

Unified Health Scoring Enhancements

We've made it easier for you to get started with Unified Health Scoring by using the new Salesforce Customer Data Platform data kit for Unified Health Scoring.

IN THIS SECTION:

[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.

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

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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](#)

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 Summer '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 Summer '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-aligned Clinical data model.

Health Cloud Has New and Changed Objects

Access more data through these new and changed Health Cloud objects

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

Utilization Management

Store information about the communication sent from payer to provider on a member's authorization request

Use the new *TrackedCommunication* object.

Store additional information associated with TrackedCommunication records

Use the new *TrackedCommunicationDetail* object.

Represent the unique identifier of the authorization request

Use the new *AuthorizationRefIdentifier* field on the *CareRequestExtension* object.

Specify if the health condition was present at the time of member admission

Use the new *PresentOnAdmission* field on the *CareDiagnosis* object.

Represent the health condition that's associated with the member

Use the new *HealthConditionId* field on the *CareDiagnosis* object.

Represent the unique identifier assigned to the item on approval of the authorization request

Use the new *AuthApprovalIdentifier* field on the *CareRequestItem* object.

Represent the unique identifier of the authorization request associated with the requested item

Use the new *AuthorizationRefIdentifier* field on the *CareRequestItem* object.

Represent the facility where a patient receives service of the requested item

Use the new *ServicingFacilityId* field on the *CareRequestItem* object.

Represent the healthcare provider who provides the service of the requested item

Use the new *ServicingProviderId* field on the *CareRequestItem* object.

Represent the clinical service request associated with the care request item

Use the new *ClinicalServiceRequestId* field on the *CareRequestItem* object.

Represent the type of item request

Use the new *RequestType* field on the *CareRequestItem* object.

Represent the priority of the authorization for the requested item

Use the new *Priority* field on the *CareRequestItem* object.

Represent the reason for requesting the item

Use the new *ReasonCodeId* field on the *CareRequestItem* object.

Represent the unique identifier assigned to the drug on approval of the authorization request

Use the new *AuthApprovalIdentifier* field on the *CareRequestDrug* object.

Represent the unique identifier of the authorization request associated with the requested drug

Use the new *AuthorizationRefIdentifier* field on the *CareRequestDrug* object.

Represent the facility where a patient receives service of the requested drug

Use the new *ServicingFacilityId* field on the *CareRequestDrug* object.

Represent the healthcare provider who provides the service of the requested drug

Use the new *ServicingProviderId* field on the *CareRequestDrug* object.

Represent the authorization status of the requested drug

Use the new *Status* field on the *CareRequestDrug* object.

Represent the reason for assigning the authorization status to the requested drug

Use the new *StatusReason* field on the *CareRequestDrug* object.

Represent the type of drug request

Use the new *RequestType* field on the *CareRequestDrug* object.

Represent the setting where the drug is administered to the patient

Use the new *DrugAdministrationSetting* field on the *CareRequestDrug* object.

Represent the priority of the authorization for the requested drug

Use the new *Priority* field on the *CareRequestDrug* object.

Represent the medication request or statement associated with the requested drug

Use the new *MedicationRefObjectId* field on the *CareRequestDrug* object.

Integrated Care Management**Store additional information about a care plan**

Use the new *CarePlanDetail* object.

Store additional information about a care plan activity

Use the new *CarePlanActivityDetail* object.

Create a library of problem definitions

Use the new *ProblemDefinition* object.

Create a library of goal definitions

Use the new *GoalDefinition* object.

Associate a goal definition to its parent problem definition

Use the new *ProblemGoalDefinition* object.

Associate an action plan template to its parent problem or goal

Use the new *ActionPlanTemplateAssignment* object.

Create a hierarchical template for a care plan

Use the new *CarePlanTemplate* object.

Create a hierarchical template for a problem in a care plan

Use the new *CarePlanTemplateProblem* object.

Create a hierarchical template for a goal in a care plan

Use the new *CarePlanTemplateGoal* object.

Store information about a care plan goal

Use the new *GoalAssignment* and *GoalAssignmentDetail* objects.

Specify the ProblemDefinition record that a HealthCondition record was instantiated from

Use the new *ProblemDefinitionId* field on the *HealthCondition* object.

Specify the problem name for a health condition in a care plan

Use the new *ProblemName* field on the *HealthCondition* object.

Specify the problem description for a health condition in a care plan

Use the new *ProblemDescription* field on the *HealthCondition* object.

FHIR R4-Aligned Clinical Data Model**Store clinical data related the episodeOfCare FHIR resource**

Use the new *CareEpisode* and *CareEpisodeDetail* objects.

Specify the care plan a medication request belongs to

Use the new *CarePlanId* field on the *MedicationRequest* object.

Advanced Therapy Management**Specify the category of a care program**

Use the new *Category* field on the *CareProgram* object.

Indicate if a work type requires scheduling

Use the new *IsSchedulingRequired* field on the *WorkTypeExtension* object.

Indicate if a work type is nonstandard and can be performed in child service territories that aren't part of the parent service territory

Use the new *IsNonstandard* field on the *WorkTypeExtension* object.

Intelligent Appointment Management**Specify the state where the license of the care provider is registered**

Use the new *LicenseJurisdictionState* field on the *CareProviderSearchableField*

Specify the country where the license of the care provider is registered

Use the new *LicenseJurisdictionCountry* field on the *CareProviderSearchableField*

Specify the region where the license of the care provider is registered

Use the new *LicenseJurisdictionRegion* field on the *CareProviderSearchableField*

Specify the status of the license given to of the care provider

Use the new *LicenseStatus* field on the *CareProviderSearchableField* object.

Specify the gender of the care provider

Use the new *ProviderGender* field on the *CareProviderSearchableField* object.

Specify the spoken language of the care provider

Use the new *ProviderLanguage* field on the *CareProviderSearchableField* object.

Intelligent Document Automation**Store information about the document type of a received document**

Use the new *ReceivedDocumentType* object.

Specify the identifier for the received document type

Use the new *Identifier* field on the *ReceivedDocumentType* object.

Specify the received document for the received document type

Use the new *ReceivedDocument* field on the *ReceivedDocumentType* object.

Specify the document type for the received document type

Use the new *DocumentType* field on the *ReceivedDocumentType* object.

Specify the page number for the received document type

Use the new *PageNumber* field on the *ReceivedDocumentType* object.

Virtual Care**Store the configuration values for an external video call service**

Use the new *VirtualVisitConfig* object.

Specify the type of service used to convert speech into text

Use the new *ComprehendServiceType* field on the *VirtualVisitConfig* object.

Specify the user that created the configuration

Use the new *DeveloperName* field on the *VirtualVisitConfig* object.

Specify the URL of the Experience Cloud site where the video call component is available to portal or guest users.

Use the new *ExperienceCloudSiteUrl* field on the *VirtualVisitConfig* object.

Specify the ID of the role that's used to allow users to join a video call

Use the new *ExternalRoleIdentifier* field on the *VirtualVisitConfig* object.

Specify the language of the labels in the video call player.

Use the new *Language* field on the *VirtualVisitConfig* object.

Specify the label that identifies the video call application throughout the Salesforce user interface

Use the new *MasterLabel* field on the *VirtualVisitConfig* object.

Specify the region in which the waiting room and messaging channel data is processed and stored

Use the new *MessagingRegion* field on the *VirtualVisitConfig* object.

Specify the named credential record that's used to authenticate and authorize an account of the video call vendor

Use the new *NamedCredentialId* field on the *VirtualVisitConfig* object.

Specify the namespace of the application configuration

Use the new *NamespacePrefix* field on the *VirtualVisitConfig* object.

Specify the name of the storage bucket that stores the meeting transcript

Use the new *StorageBucketName* field on the *VirtualVisitConfig* object.

Specify the unique name of the Salesforce feature for which the video call configuration record is created

Use the new *UsageType* field on the *VirtualVisitConfig* object.

Specify the default Appointment Type picklist values from the Service Appointment object that represent a video appointment type

Use the new *VideoCallApptTypeValue* field on the *VirtualVisitConfig* object.

Specify the region through which API calls related to Video Calls are made

Use the new *VideoControlRegion* field on the *VirtualVisitConfig* object.

Specify the region through which the Video Call video and audio data are processed

Use the new *VisitRegion* field on the *VirtualVisitConfig* object.

SEE ALSO:

[Developer Guide: Utilization Management Data Model](#)

[Developer Guide: Intelligent Appointment Management Data Model](#)

[Developer Guide: Advanced Therapy Management Data Model](#)

New Salesforce Healthcare APIs

Health Cloud includes new Healthcare API that can interact with any system that utilizes Fast Healthcare Interoperability Resources (FHIR) API.

Prior Authorization EMR Retrieval API

Sync Salesforce object data for prior authorization requests

Make a POST request to the new */PriorAuthSync* resource.

New request body: Prior Auth Create Request

New response body: Prior Auth Response

Fetch a patient's insurance coverage details

Make a GET request to the new */Coverage* resource.

New request parameter: patient

New response body: Coverage Read Response

Prior Authorization Claim Submission API

Create a claim submission request with prior authorization

Make a POST request to the new `/PriorAuthClaim` resource.

New request body: Prior Auth Claim Create Request

New response body: Prior Auth Claim Response

Prior Authorization API

Create a claim submission request with prior authorization

Make a POST request to the new `/$claim` resource.

New request body: Prior Auth Claim Create Request

New response body: Prior Auth Claim Response

Create a claim inquiry request with prior authorization

Make a POST request to the new `/$inquiry` resource.

New request body: Prior Auth Inquiry Create Request

New response body: Prior Auth Inquiry Response

SEE ALSO:

[Developer Guide: Salesforce Healthcare API](#)

Connect REST API

Integrate mobile apps, intranet sites, and third-party web applications with Salesforce using Health Cloud Connect REST API.

IN THIS SECTION:

[Changed Connect REST API Request Bodies](#)

These request bodies have changes for Health Cloud.

[Changed Connect REST API Response Bodies](#)

These response bodies have changes for Health Cloud.

SEE ALSO:

[Salesforce Health Cloud Developer Guide: Care Services Review API](#)

Changed Connect REST API Request Bodies

These request bodies have changes for Health Cloud.

Health Cloud

Care Diagnosis

This response body has these new properties.

- `presentOnAdmission`—Specifies if the health condition was present at the time of member admission.
- `healthConditionId`—The ID of the health condition record that's associated with the member.

Care Request

This response body has these new properties.

- `authorizationRefIdentifier`—The unique identifier of the authorization request.
- `caseSubStatus`—The sub status of care request in each stage of care request.
- `requestedLengthOfStay`—Requested length of stay for the patient.

Care Request Drug

This response body has these new properties.

- `authApprovalIdentifier`—The unique identifier assigned to the drug on approval of the authorization request.
- `authorizationRefIdentifier`—The unique identifier of the authorization request associated with this requested drug.
- `drugAdministrationSetting`—The setting in which the drug is expected to be administered to the patient.
- `medicationRefObjectId`—The medication request or statement associated with the care request drug.
- `prescriptionFillDate`—Date for the prescription fills.
- `priority`—The priority representing the urgency of the drug's authorization request.
- `requestType`—The type of drug request.
- `servicingFacility`—The facility where a patient receives service of the requested drug.
- `servicingProvider`—The healthcare provider who provides the service of the requested drug.
- `status`—The authorization status of the requested drug.
- `statusReason`—The reason for the authorization status of the requested drug

Care Request Item

This response body has these new properties.

- `authApprovalIdentifier`—The unique identifier assigned to the item on approval of the prior authorization request.
- `authorizationRefIdentifier`—The unique identifier of the prior authorization request associated with this requested item.
- `clinicalServiceRequestId`—The clinical service request associated with the care request item.
- `priority`—The priority representing the urgency of the item's authorization request.
- `reasonCode`—The reason justifying the care request of the item.
- `requestType`—The type of item request.
- `servicingFacility`—The facility where a patient receives service of the requested item.
- `servicingProvider`—The healthcare provider who provides the service of the requested item.

Changed Connect REST API Response Bodies

These response bodies have changes for Health Cloud.

Health Cloud

Care Authorization Request

This response body has this new property.

- `trackedCommunications`—A list of tracked communications for a care request.

Care Diagnosis

This response body has these new properties.

- `presentOnAdmission`—Specifies if the health condition was present at the time of member admission.
- `healthConditionId`—The ID of the health condition record that's associated with the member.

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- `servicingProvider`—The healthcare provider who provides the service of the requested item.

New Health Cloud Metadata Types

Make the most of the new metadata types of Health Cloud.

Metadata Type

Set up an external video provider that relays Salesforce events

Use the new VirtualVisitConfig metadata type. Introduced in API version 54.0, this type has been added to the *Metadata API Developer Guide*.

Metadata Type

Configure an object relation UI component created by the administrator

Use the new UIObjectRelationConfig metadata type. Introduced in API version 54.0, this type has been added to the *Metadata API Developer Guide*.

MuleSoft Direct for Health Cloud

Integrate Health Cloud with external systems by using MuleSoft Direct for Health Cloud that offers a connectivity solution to process industry-standard integrations. MuleSoft Direct for Health Cloud rapidly integrates and synchronizes data and processes from multiple systems such as Electronic Health Record (EHR), provider, or payer systems into an industry-standard format to power connected experiences.

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 MuleSoft add-on product called MuleSoft Direct for Health cloud.

Why: Connect Health Cloud to Anypoint Platform through a simple user interface and gain access to pre-built integration apps that are compliant with FHIR industry standards. You can further customize and extend the standard APIs and implementation templates in line with business needs.

With the Spring '23 release, get the experience of an accelerated and hassle free, end-to-end Utilization Management authorization process using our Industry Integration Solutions.

SEE ALSO:

[Salesforce Developer Guide: Industry Integrations](#)

[Salesforce Help: Built-In MuleSoft Integration to Manage Authorization Requests](#)

Intelligent Sales Sample Flows for Field Inventory Management

Efficiently and accurately manage your medical device inventories and cycle counts by using Intelligent Sales Sample Flows for Field Inventory Management. Quickly capture and fulfill product requests, keep track of inventory for serialized products, and meet regulatory compliance. The flows are available from mobile devices, making it easy for sales representatives to perform important tasks on-the-go. After deploying the sample flows into Salesforce, you can customize them to meet your unique business needs.

IN THIS SECTION:

[Capture and Fulfill Sample Requests](#)

Capture and fulfill sample product requests from providers by using the Sample Request Management flow. The flow also updates the serialized product inventory and captures the e-signature of the provider for regulatory compliance.

[Capture and Fulfill Trial Requests](#)

Capture and fulfill product trial requests from providers using the Trial Request Management flow. The flow links the request with a new or existing opportunity, creates an order, and updates the serialized product inventory. It also captures the provider's e-signature for regulatory compliance.

[Capture and Fulfill Loan Requests](#)

Capture and fulfill product loan requests from providers by using the Loan Request Management flow. The flow creates an order for the handed-over product, updates the serialized product inventory, and captures the provider's e-signature for regulatory compliance.

[Manage Retrieval of Products Given on Loan or as a Trial](#)

Manage the retrieval of a loaned or trial product using the Product Retrieval Management flow. Record product quantity and condition at the time of retrieval, and capture the provider's e-signature for regulatory compliance. The flow also automatically updates the serialized product inventory.

[Register Missing Products to Keep Track of Your Inventory](#)

Ensure that every product in your inventory is accounted for during a cycle count. Use the Mark as Lost flow to register missing serialized products.

[Relate a Product to a New or Existing Order](#)

Use the Relate to Order Cycle Count flow to relate a product to a new or existing order during a cycle count. You can also link the order with a visit for the selected account.

Capture and Fulfill Sample Requests

Capture and fulfill sample product requests from providers by using the Sample Request Management flow. The flow also updates the serialized product inventory and captures the e-signature of the provider for regulatory compliance.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions of Salesforce provisioned with the Health Cloud license or Health Cloud Life Sciences license.

Who: This feature is available to users who are assigned the ActionPlans, Health Cloud Foundation, and Industries Visits permission sets.

How: Download the Intelligent Sales Sample Flows for Field Inventory Management from the [Accelerate HLS site](#) and deploy using Workbench. Make sure Intelligent Sales is enabled, and you have the right data set up.

SEE ALSO:

[Salesforce Help: Enable Intelligent Sales](#)

[Salesforce Help: Set Up Data for Intelligent Sales](#)

Capture and Fulfill Trial Requests

Capture and fulfill product trial requests from providers using the Trial Request Management flow. The flow links the request with a new or existing opportunity, creates an order, and updates the serialized product inventory. It also captures the provider's e-signature for regulatory compliance.

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SEE ALSO:

[Salesforce Help: Enable Intelligent Sales](#)

[Salesforce Help: Set Up Data for Intelligent Sales](#)

Loyalty Management

Create promotions and define their eligibility and rewards in three simple steps by using the Quick Promotion wizard. Ensure customer service reps can easily engage with members and provide contextual support. Automate the process of generating voucher codes and member referral codes. Allow customer service reps to merge memberships with ease. Track the changes in the statuses and subscriptions of members. Easily style widgets with your company's branding and add new widgets on third-party sites.

IN THIS SECTION:

[Configure Promotions with a Guided Wizard](#)

Create a promotion, define its eligibility and rewards, and then activate the promotion in a streamline by using the Quick Promotion wizard. After you activate a quick promotion, the rules required to apply the promotion to accrual transaction journals are automatically created along with a bunch of other records that are associated with the promotion. With quick promotions, all orgs with Loyalty Management can create promotions.

[Customer Service for Loyalty Program Members](#)

Use Identity Verification Flows and Loyalty Excellence service console for Loyalty Program Members so that your customer service representatives (CSRs) can engage your loyalty program members better. CSRs can use Identity Verification flows to verify the identity of your loyalty program members or their authorized member representatives. Then, CSRs can use the service console to resolve issues, clarify questions, manage requests, and more of loyalty program members or authorized member representatives.

[Issue Vouchers with Codes of Your Choice](#)

Loyalty program managers and admins can now generate codes for issued vouchers without using formulas. Loyalty program managers only decide the prefix, suffix, and length of the voucher codes. Loyalty Management takes care of generating the unique voucher codes. An automatically generated voucher code contains the prefix and suffix with automatically generated alphanumeric characters in between.

[Member Referral Code](#)

Assign members a unique referral code that their friends and family can use to join the loyalty program. Either automatically generate a referral code for members or allow members to specify their own referral code when joining the loyalty program. Based on a member's request or your loyalty program's requirements, you can regenerate the referral code for members.

[Member Engagement Widgets](#)

Continuing to drive the engaging and differentiated member experience, we have eight more widgets out-of-the-box to engage your loyalty members in third-party portals and websites. These widgets range from referrals, benefits, badges, vouchers to member transaction-related areas. You can easily customize the out-of-the-box widgets based on your branding needs. Now, you can quickly design the widgets within the Loyalty Management app using the light-weight Loyalty Widget Designer.

[Enable Customer Service Reps to Merge Memberships and Transfer Benefits Easily](#)

Admins no longer have to set up a flow from scratch to merge memberships. The Merge Loyalty Program Memberships template screen flow does it for admins. The flow also assigns tier benefits to the target membership and processes the benefits actions associated with the tier benefits. Add the template flow to the Loyalty Program Member page as a quick action to allow customer service reps to merge memberships as soon as they receive a request for it.

[Track Member Status Changes Including Subscriptions](#)

Use Loyalty Membership Lifecycle records to keep a tab on the changes in the status of members. You can track the changes in the duration and the status of a member's subscription. If your loyalty program has paid tiers, you can track the duration for which members must be a part of the paid tier.

[Promotion Setup](#)

Search and select the resources that you need instead of navigating a cascading list to find the right resource. Use a batch job to change member tier using loyalty program process.

[Call Loyalty Management Invocable Actions Using Invocable Namespace](#)

You can now use classes and methods from the Invocable namespace in Apex to call Loyalty Management invocable actions instead of using the LoyaltyManagement namespace's classes.

[Track Member Engagement Easily](#)

Orgs that have enabled the Loyalty Management - Growth license can use member engagement attributes to track and reward members for engaging with the loyalty program.

[Easily Monitor Transactions and Prevent Fraud](#)

Use the enhanced Fraud Analytics dashboard to easily filter your loyalty program transactions based on various parameters, such as the count of transactions in a week. And quickly identify potential fraud by identifying uncharacteristic behavior of transactions and members. You can create the Analytics for Loyalty app in Analytics Studio by using the Analytics for Loyalty template.

[New and Changed Objects in Loyalty Management](#)

Do more with the new and updated Loyalty Management objects.

[New Invocable Action in Loyalty Management](#)

Use the new invocable action for Loyalty Management.

[New and Changed Loyalty Management Metadata Types](#)

Make the most of the new and changed metadata types of Loyalty Management.

[Changed Connect REST API Request Bodies](#)

These request bodies have changes.

Configure Promotions with a Guided Wizard

Create a promotion, define its eligibility and rewards, and then activate the promotion in a streamline by using the Quick Promotion wizard. After you activate a quick promotion, the rules required to apply the promotion to accrual transaction journals are automatically created along with a bunch of other records that are associated with the promotion. With quick promotions, all orgs with Loyalty Management can create promotions.

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

How: On a Loyalty Program record, click **Loyalty Experiences**. On the Promotions related list, click **Quick Promotion**. Define your promotion and its eligibility and rewards. Review your quick promotion's configuration and activate it. The rules and the associated records of the promotion are automatically created.

Step 3 of 4
Configure Promotion Rewards

1. Promotion Reward

Credit Fixed Number of Points

Do you want to credit points based on the member's tier?

Currency
Points to Credit

Tokens
500

+ Add Currency

Would you like to add a specific expiration date for the credited points?

Expiration Date


Apr 30, 2023

Is there a limit to the number of times points are credited to members for the promotion?

Limit

2

+ Add Another Reward



Configure how members are rewarded when the promotion is applied to transactions.

- Enter Primary Information
- Define Promotion Eligibility
- Configure Promotion Rewards**
- Review and Activate Promotion

Summary
Holiday Season Promotion
Valid from Nov 5, 2022 to Dec 31, 2022
Promotion Eligibility

- Minimum purchase amount: 150
- Minimum purchase quantity: 2

SEE ALSO:

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

Customer Service for Loyalty Program Members

Use Identity Verification Flows and Loyalty Excellence service console for Loyalty Program Members so that your customer service representatives (CSRs) can engage your loyalty program members better. CSRs can use Identity Verification flows to verify the identity of your loyalty program members or their authorized member representatives. Then, CSRs can use the service console to resolve issues, clarify questions, manage requests, and more of loyalty program members or authorized member representatives.

IN THIS SECTION:

[Member and Member Representative Identity Verification](#)

Verify the identity of a loyalty program member or an authorized representative for engagements initiated through OpenCTI and Omni-Channel. Customer service representatives can access the verification flow from an Engagement Interaction or a Voice Call record page.

[Service Console for Loyalty Program Members](#)

Customer service representatives (CSRs) can get a comprehensive view of members' details and activities in one page by using the service console for loyalty program members. CSRs can use the console to proactively engage loyalty program members and resolve their questions, address their requests, search for relevant knowledge articles, get alerts for related records that need attention, and run actions to resolve member requests. CSRs can also track previous interactions on a timeline and check related records.

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Member and Member Representative Identity Verification

Verify the identity of a loyalty program member or an authorized representative for engagements initiated through OpenCTI and Omni-Channel. Customer service representatives can access the verification flow from an Engagement Interaction or a Voice Call record page.

IN THIS SECTION:

[Verify Member Identity for Engagements Initiated Via Omni-Channel](#)

Your customer service representative (CSR) can now verify the identity of a member or an authorized member representative who initiates an engagement over voice call via Omni-Channel.

[Extend Identity Verification Flow Using Custom Flow Screen Components](#)

Customer service representatives verify the identity of loyalty program members or authorized member representatives by using the prebuilt Verify Customer Identity or the Verify Identity of Loyalty Program Member flows. The Verify Identity of Loyalty Program Member flow is a customized flow that's provided by Loyalty Management. You can also create custom flows in Flow Builder by using the Verify Customer Identity Flow template.

Verify Member Identity for Engagements Initiated Via Omni-Channel

Your customer service representative (CSR) can now verify the identity of a member or an authorized member representative who initiates an engagement over voice call via Omni-Channel.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Loyalty Management - Growth or Loyalty Management - Advanced is enabled.

How: In Flow Builder, create a flow by using the Verify Identity of Loyalty Program Member template or Verify Customer Identity Flow template. Next, create an Engagement Interaction and a Voice Call Lightning record page. Add the flow to Engagement Interaction and to the Voice Call record pages in Lightning App Builder.

SEE ALSO:

[Salesforce Help: Make the Verify Customer Identity Flow Available to Users \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Create a Flow Using the Verify Customer Identity Flow Template \(can be outdated or unavailable during release preview\)](#)

Extend Identity Verification Flow Using Custom Flow Screen Components

Customer service representatives verify the identity of loyalty program members or authorized member representatives by using the prebuilt Verify Customer Identity or the Verify Identity of Loyalty Program Member flows. The Verify Identity of Loyalty Program Member flow is a customized flow that's provided by Loyalty Management. You can also create custom flows in Flow Builder by using the Verify Customer Identity Flow template.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Loyalty Management - Growth or Loyalty Management - Advanced is enabled.

Who: The Verify Identity of Loyalty Program Member flow is available to users who have the Loyalty Service Excellence permission set.

How: On the Flows page in Setup, clone either the Verify Identity of Loyalty Program Member template or the Verify Customer Identity Flow template. Customize the cloned flow based on your requirements. Next, create an Engagement Interaction and a Voice Call Lightning record page. Add the cloned flow to Engagement Interaction and to the Voice Call record pages in Lightning App Builder.

SEE ALSO:

[Salesforce Help: Make the Verify Customer Identity Flow Available to Users \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Create a Flow Using the Verify Customer Identity Flow Template \(can be outdated or unavailable during release preview\)](#)

Service Console for Loyalty Program Members

Customer service representatives (CSRs) can get a comprehensive view of members' details and activities in one page by using the service console for loyalty program members. CSRs can use the console to proactively engage loyalty program members and resolve their questions, address their requests, search for relevant knowledge articles, get alerts for related records that need attention, and run actions to resolve member requests. CSRs can also track previous interactions on a timeline and check related records.

IN THIS SECTION:

[Get a Quick View of a Member's Primary Details](#)

Customer service representatives can quickly view a loyalty program member's basic information, such as the member's name, membership number, date of joining, primary tier, points balance, membership status, and the loyalty program's name in the Member Profile card.

[View Loyalty Member Timeline](#)

Your service representatives can use the out-of-the-box Loyalty Member Timeline feature to track the customer-engagement interactions chronologically. View the past and upcoming interactions and related details. Create an engagement interaction when members or member's authorized representatives contact the customer service representatives.

[Show Member Activity Details](#)

Show relevant details of loyalty program members' activity in your service console so that your customer service reps (CSRs) can quickly view the details and assist members more efficiently. You can show four tabs out of the seven options in any order: Overview, Transactions, Promotions, Vouchers, Benefits, Badges, and Associated Groups. You can also show member activity details on members' Contact or Account records.

[Alert Your Agents When Member Activities Require Action](#)

Show alerts on the Loyalty Program Member page so that your customer service representatives, loyalty program admins, and program managers can be in control of changes related to your loyalty program members. For example, show alerts on a member's expiring points or vouchers so that the members can take immediate action and avoid issues. You can also alert customer service representatives. You can create alerts manually or automatically.

[Launch Actions Quickly and Resolve Member Queries Fast](#)

Configure actions by using flows, OmniScripts, or quick actions so that your customer service representatives can use Action Launcher to quickly find and run service actions, such as issuing a voucher, and changing member's tiers, and resolve queries.

[Manage Cases](#)

Create cases for loyalty program members and associate the cases with the respective loyalty program member records. Use the service console to manage the cases.

[View Loyalty Member Lifecycle](#)

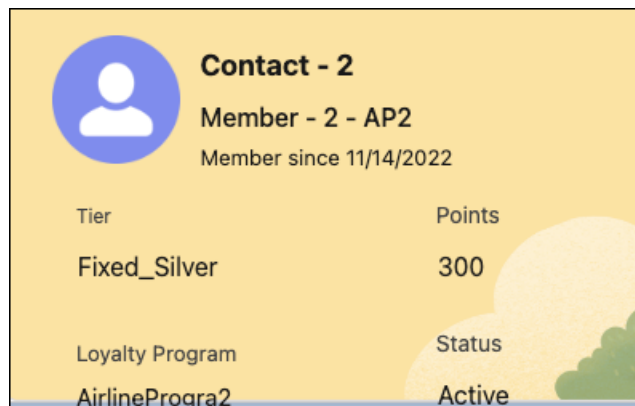
Use the Loyalty Membership Lifecycle component to track a member's change of status. You can track changes, such as the duration of a purchased subscription and the status of the subscription. If your loyalty program has paid tiers, then you can track the duration for which members are required to be part of the paid tier.

Get a Quick View of a Member's Primary Details

Customer service representatives can quickly view a loyalty program member's basic information, such as the member's name, membership number, date of joining, primary tier, points balance, membership status, and the loyalty program's name in the Member Profile card.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Loyalty Management - Growth or Loyalty Management - Advanced is enabled.

How: If the Member Profile card is missing from your service console, click **Setup** and select **Edit Page**. Add the Flexcard component to the page layout. From Flexcard Name, select **MemberProfileCardForLSE**. Save and activate the page layout. To customize the Member Profile card, clone the card in OmniStudio, and then modify the card.

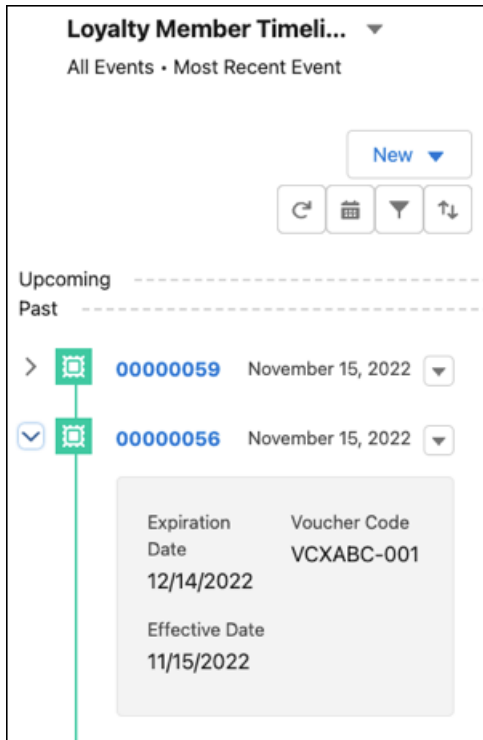


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Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Loyalty Management - Growth or Loyalty Management - Advanced is enabled.

How: Turn on Timeline from Setup. If the Timeline component is missing from your service console, add the Timeline component to your Loyalty Program Member record page, and then select **Loyalty Member Timeline** from the dropdown list.



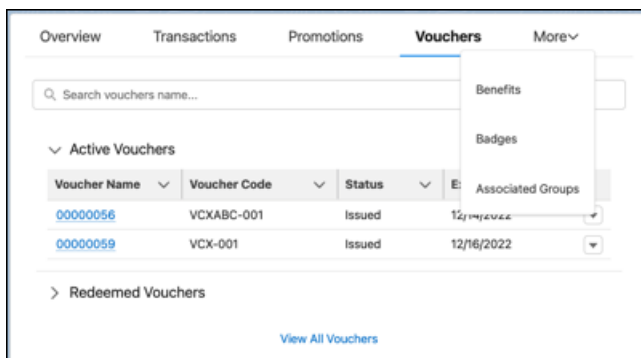
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Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Loyalty Management - Growth or Loyalty Management - Advanced is enabled.

How: To add or remove tabs, go to **Setup** and select **Edit Page**. On the Tabs component, add or remove tabs. Save and activate the updated page layout.

To show member activity details on members' Account or Contact record, add the Loyalty Member Profile component to the page layout and select **Show member's activity details**.



Alert Your Agents When Member Activities Require Action

Show alerts on the Loyalty Program Member page so that your customer service representatives, loyalty program admins, and program managers can be in control of changes related to your loyalty program members. For example, show alerts on a member's expiring points or vouchers so that the members can take immediate action and avoid issues. You can also alert customer service representatives. You can create alerts manually or automatically.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Loyalty Management - Growth or Loyalty Management - Advanced is enabled.

How: Set up alerts by using Flow Builder, Data Processing Engine, or Promotion Setup. Create alert entries in the Record Alerts object and assign the alerts with alert severity. In Lightning App Builder, on the record page that you're editing, add the Alerts FlexCard component to the page layout.

Launch Actions Quickly and Resolve Member Queries Fast

Configure actions by using flows, OmniScripts, or quick actions so that your customer service representatives can use Action Launcher to quickly find and run service actions, such as issuing a voucher, and changing member's tiers, and resolve queries.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Loyalty Management - Growth or Loyalty Management - Advanced is enabled.

SEE ALSO:

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

Manage Cases

Create cases for loyalty program members and associate the cases with the respective loyalty program member records. Use the service console to manage the cases.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Loyalty Management - Growth or Loyalty Management - Advanced is enabled.

View Loyalty Member Lifecycle

Use the Loyalty Membership Lifecycle component to track a member's change of status. You can track changes, such as the duration of a purchased subscription and the status of the subscription. If your loyalty program has paid tiers, then you can track the duration for which members are required to be part of the paid tier.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Loyalty Management - Growth or Loyalty Management - Advanced is enabled.

Issue Vouchers with Codes of Your Choice


Loyalty program managers and admins can now generate codes for issued vouchers without using formulas. Loyalty program managers only decide the prefix, suffix, and length of the voucher codes. Loyalty Management takes care of generating the unique voucher codes. An automatically generated voucher code contains the prefix and suffix with automatically generated alphanumeric characters in between.

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

How: On the Loyalty Management Setting page in Setup, turn on Generate Codes for Vouchers. After the setting is enabled, loyalty program managers can enter the prefix, suffix, and the length of the code to be automatically generated in Voucher Definition records. The codes of the vouchers issued using the voucher definition are automatically generated.

Generate Codes for Vouchers

Generates codes when issuing vouchers to members. A voucher code consists of three parts, a prefix, an alphanumeric value, and a suffix. You must define the prefix and suffix for vouchers in their definitions. The alphanumeric value between the prefix and suffix is automatically populated.



Enabled

i Although this setting is enabled, you can choose to provide a code when issuing vouchers. The voucher code that you provide replaces the autogenerated voucher code.

SEE ALSO:

[Salesforce Help: Enable Automatic Generation of Voucher Code \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Automatic Generation of Voucher Codes \(can be outdated or unavailable during release preview\)](#)

Member Referral Code

Assign members a unique referral code that their friends and family can use to join the loyalty program. Either automatically generate a referral code for members or allow members to specify their own referral code when joining the loyalty program. Based on a member's request or your loyalty program's requirements, you can regenerate the referral code for members.

IN THIS SECTION:

[Get Your Member Referral Scheme Up and Running](#)

When joining a loyalty program, members can decide their unique referral code. Or, allow Loyalty Management to automatically create the referral codes for members when their Loyalty Program Member records are created. You can reward a member when their acquaintances use the member's referral code to join the loyalty program.

[Manage Requests to Change Referral Codes](#)

Customer service reps can now change the automatically generated referral code for a member based on member request. Admins can also use Flows to change the referral codes of members. If a member doesn't have a referral code, customer service reps can generate a referral code or a flow can be set up by the admin to generate referral codes.

Get Your Member Referral Scheme Up and Running

When joining a loyalty program, members can decide their unique referral code. Or, allow Loyalty Management to automatically create the referral codes for members when their Loyalty Program Member records are created. You can reward a member when their acquaintances use the member's referral code to join the loyalty program.

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

How: If you've integrated an external system with any of the member enrollment business APIs, provide the member's referral code in your request. If you design a loyalty program process to enroll members, use an input parameter to provide the referral code for members. Loyalty program managers or service representatives can also specify the referral code when creating a Loyalty Program Member record. When you don't specify the member referral code, the code is automatically generated.

You can create a loyalty program process to reward members when their referral code is used by another customer to join the loyalty program.

SEE ALSO:

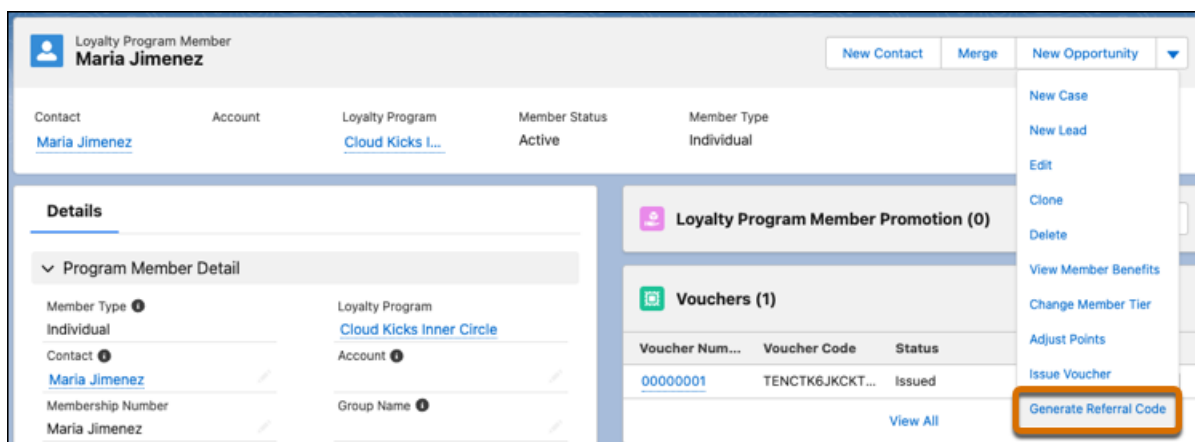
[Salesforce Help: Add Referral Code during Member Enrollment \(can be outdated or unavailable during release preview\)](#)

Manage Requests to Change Referral Codes

Customer service reps can now change the automatically generated referral code for a member based on member request. Admins can also use Flows to change the referral codes of members. If a member doesn't have a referral code, customer service reps can generate a referral code or a flow can be set up by the admin to generate referral codes.

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

How: Customer service reps can use the Generate Referral Code quick action on Loyalty Program Member records to generate a new referral code for members. Admins can use the Generate Member Referral Code action in a flow to generate referral codes for members.



SEE ALSO:

[Salesforce Help: Generate Member Referral Codes Using Quick Action \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Generate Referral Codes using Flow \(can be outdated or unavailable during release preview\)](#)

Member Engagement Widgets

Continuing to drive the engaging and differentiated member experience, we have eight more widgets out-of-the-box to engage your loyalty members in third-party portals and websites. These widgets range from referrals, benefits, badges, vouchers to member transaction-related areas. You can easily customize the out-of-the-box widgets based on your branding needs. Now, you can quickly design the widgets within the Loyalty Management app using the light-weight Loyalty Widget Designer.

IN THIS SECTION:

[Create Member Engagement Widgets Easily](#)

Loyalty program managers can now easily customize the out-of-the-box widgets and design the experiences based on their branding guidelines. By using the Widget Designer, you can quickly change font, color, text, and images of your widgets.

[Encourage Members to Refer Your Loyalty Programs](#)

Drive new member acquisitions by promoting member referrals. Embed the Refer Friends widget in external member portals so that members can refer family and friends to your loyalty program easily. Members can share the referral code or link via multiple channels, such as WhatsApp, Twitter, and Telegram.

[Show Badges to Program Members](#)

Enhance member experience by showing your program members badges they earned recently for their activities. Embed the View Member Badges widget in member portals and enable them to view their assigned badges.

[Show Transaction History to Program Members](#)

Show your program members their transaction history, such as activity name, activity date, points type, and points on a widget in member portals.

[Show Vouchers to Program Members](#)

Show your program members all active vouchers that members can redeem by embedding the Member Vouchers widget in member portals. Vouchers on the widget show the voucher code and the expiration date. Members can redeem vouchers in subsequent transactions by copying the voucher code.

[Show Eligible Benefits to Program Members](#)

Enable your program members to view the benefits they are eligible for on a widget in the member portals. The widget includes both the benefits based on their tier and personalized benefits assigned to them.

[Enable Program Members to Select Their Benefits](#)

Now, your loyalty program members can select benefits of their choice. Embed the Select Member Benefits widget in external member portals so that members can view and select their benefits. The benefits shown on the widget are tagged as selectable by members within the program. Allow limiting the number of benefits that a member can select from the list.

[Nudge Program Members to Complete Challenges in Cumulative Promotions](#)

Nudge your program members to complete the challenges in a promotion. In cumulative promotions, you can reward your members based on long-term behavior, spending, or participation frequency. For example, reward a voucher for the cumulative purchase of 500 USD this month. You can embed this widget to show the promotion and the member's progress towards achieving the goal. You can configure a call to action such as rewards catalog so that members can readily use it.

[Nudge Program Members to Redeem Expiring Points](#)

Nudge your loyalty program members to redeem their points before they expire. When a member's points are close to the expiration date, use this widget to show the expiring points along with their expiration date. Show opportunities to redeem points by giving an action link, for example, rewards catalog or transaction history.

Create Member Engagement Widgets Easily

Loyalty program managers can now easily customize the out-of-the-box widgets and design the experiences based on their branding guidelines. By using the Widget Designer, you can quickly change font, color, text, and images of your widgets.

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

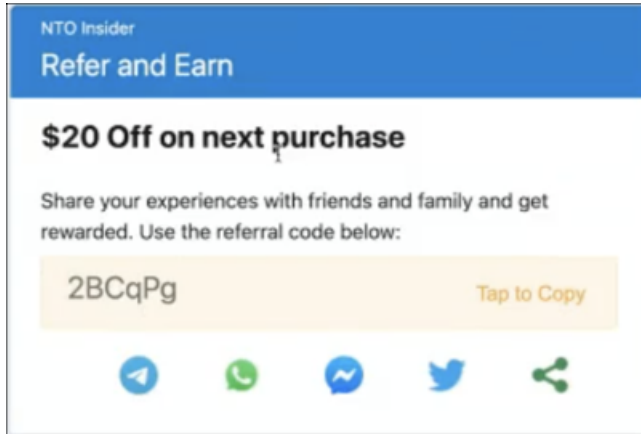
How: Create widgets by cloning the templates in the Loyalty Widget Designer from the Loyalty Program page. Customize, download, and deploy the widgets in external member portals and websites.

Encourage Members to Refer Your Loyalty Programs

Drive new member acquisitions by promoting member referrals. Embed the Refer Friends widget in external member portals so that members can refer family and friends to your loyalty program easily. Members can share the referral code or link via multiple channels, such as WhatsApp, Twitter, and Telegram.

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

How: To create member engagement widgets, clone and configure the Refer Friends widget template in Loyalty Widget Designer or OmniStudio. Customize the widgets and get them deployed in third-party member portals and websites.



Show Badges to Program Members

Enhance member experience by showing your program members badges they earned recently for their activities. Embed the View Member Badges widget in member portals and enable them to view their assigned badges.

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

How: To create member engagement widgets, clone and configure the View Member Badges widget template in Loyalty Widget Designer or OmniStudio. Customize and deploy the widgets in third-party member portals and websites.

Show Transaction History to Program Members

Show your program members their transaction history, such as activity name, activity date, points type, and points on a widget in member portals.

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

Why: The widget shows member transactions in these views:

- Summary View—Shows the recent transaction details of the member.
- Detailed View—Shows up to 300 transactions of the member with details, such as product category, product, and amount.

How: To create member engagement widgets, clone and configure the View Transaction History widget template in Loyalty Widget Designer or OmniStudio. Customize and deploy the widgets in third-party member portals and websites.

Show Vouchers to Program Members

Show your program members all active vouchers that members can redeem by embedding the Member Vouchers widget in member portals. Vouchers on the widget show the voucher code and the expiration date. Members can redeem vouchers in subsequent transactions by copying the voucher code.

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

How: To create member engagement widgets, clone and configure the relevant widget template in Loyalty Widget Designer or OmniStudio. Customize the widgets and get them deployed in third-party member portals and websites.

Show Eligible Benefits to Program Members

Enable your program members to view the benefits they are eligible for on a widget in the member portals. The widget includes both the benefits based on their tier and personalized benefits assigned to them.

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

How: To create member engagement widgets, clone and configure the relevant widget template in Loyalty Widget Designer or OmniStudio. Customize the widgets and get them deployed in third-party member portals and websites.

Enable Program Members to Select Their Benefits

Now, your loyalty program members can select benefits of their choice. Embed the Select Member Benefits widget in external member portals so that members can view and select their benefits. The benefits shown on the widget are tagged as selectable by members within the program. Allow limiting the number of benefits that a member can select from the list.

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

How: To list a benefit on the widget, select the Benefit Selection Allowed checkbox. To create member engagement widgets, clone and configure the Select Member Benefits widget template in Loyalty Widget Designer or OmniStudio. Customize the widgets and get them deployed in third-party member portals and websites.

Nudge Program Members to Complete Challenges in Cumulative Promotions

Nudge your program members to complete the challenges in a promotion. In cumulative promotions, you can reward your members based on long-term behavior, spending, or participation frequency. For example, reward a voucher for the cumulative purchase of 500 USD this month. You can embed this widget to show the promotion and the member's progress towards achieving the goal. You can configure a call to action such as rewards catalog so that members can readily use it.

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

Why: The widget shows the current spend against the reward spend and how much the member is short of to gain the reward.

How: To create member engagement widgets, clone and configure the relevant widget template in Loyalty Widget Designer or OmniStudio. Customize the widgets and get them deployed in third-party member portals and websites.

Nudge Program Members to Redeem Expiring Points

Nudge your loyalty program members to redeem their points before they expire. When a member's points are close to the expiration date, use this widget to show the expiring points along with their expiration date. Show opportunities to redeem points by giving an action link, for example, rewards catalog or transaction history.

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

How: To create member engagement widgets, clone and configure the relevant widget template in Loyalty Widget Designer or OmniStudio. Customize the widgets and get them deployed in third-party member portals and websites.

Enable Customer Service Reps to Merge Memberships and Transfer Benefits Easily

Admins no longer have to set up a flow from scratch to merge memberships. The Merge Loyalty Program Memberships template screen flow does it for admins. The flow also assigns tier benefits to the target membership and processes the benefits actions associated with the tier benefits. Add the template flow to the Loyalty Program Member page as a quick action to allow customer service reps to merge memberships as soon as they receive a request for it.

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

How: To add the flow as an action, create an action for the Loyalty Program Member object, and add the action to the object's page layout. Customer service reps can click the button on the Loyalty Program Member record to be merged. On the Collect Merge Details window, select the target loyalty program membership, and click **Merge**.

SEE ALSO:

[Salesforce Help: Set Up a Quick Action to Merge Memberships using a Template Flow \(can be outdated or unavailable during release preview\)](#)

Track Member Status Changes Including Subscriptions

Use Loyalty Membership Lifecycle records to keep a tab on the changes in the status of members. You can track the changes in the duration and the status of a member's subscription. If your loyalty program has paid tiers, you can track the duration for which members must be a part of the paid tier.

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

How: Go to a Loyalty Program Member record. On the Membership Lifecycle related list, click **New**. Define the status change event, and save the record.

New Loyalty Membership Lifecycle

Loyalty Membership Lifecycle Details

• Loyalty Program Member: Maria Jimenez

• Membership Type: Media Subscription

• Membership Status: Active

Effective Start Date: 1/5/2023

Effective End Date: 1/4/2024

Order Item: Search Order Products...

External Identifier:

Comments: Member has purchased a media subscription for one year.

Buttons: Cancel, Save & New, Save

SEE ALSO:

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

Promotion Setup

Search and select the resources that you need instead of navigating a cascading list to find the right resource. Use a batch job to change member tier using loyalty program process.

IN THIS SECTION:

[Schedule Batch Jobs to Change Member Tiers](#)

Set up Batch Management jobs to change member tiers using loyalty program processes. Configure a single process or multiple processes to assess the eligibility of members for the tiers of the loyalty program and upgrade members to the right tiers. When setting up the batch job to change member tiers, use data from a standard or custom object to determine the members who are eligible for the tier change.

[Select Resources Without Combing Through Lists](#)

Search for and select resources while designing an action or a condition in loyalty program process rules. Previously, loyalty program managers manually clicked through a cascading list to find your resource. When you select a resource in an action or a condition, search for the resource in the dropdown and select your resource from the search result.

Schedule Batch Jobs to Change Member Tiers

Set up Batch Management jobs to change member tiers using loyalty program processes. Configure a single process or multiple processes to assess the eligibility of members for the tiers of the loyalty program and upgrade members to the right tiers. When setting up the batch job to change member tiers, use data from a standard or custom object to determine the members who are eligible for the tier change.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Loyalty Management - Growth or Loyalty Management - Advanced is enabled.

Why: For example, a loyalty program process that's used to change a member tier contains one rule. The rule contains three conditions, each checking if the member is eligible for a particular tier based on their current points balance. Each condition consists of a child action that upgrades a member to the tier that the condition found the member to be eligible for. The org uses a custom object to store data about the members who have been credited qualifying points in the last 24 hours and who are eligible for a tier assessment. In the batch job that's used to run the loyalty program process for tier changes, the custom object provides the list of eligible members whose tiers must be assessed and upgraded.

How: From Setup, in the Quick Find box, enter **Batch Management**, and then select **Batch Management**. Click **New**. Select **Loyalty Program Process** as the process type, and select an active TierProcessing type loyalty program process as the execution process. Fill the other required fields, and click **Next**. Select an object that contains the list of the members whose tiers must be assessed. From the selected object, select the field that has a lookup relationship with the Loyalty Program Member object. Save your changes.

New batch job

* Name: Run Process to Change Member Tier

* API Name: Run_Process_to_Change_Member_Tier

Description: The batch job runs the Change Member Tier loyalty program process to upgrade the tier of eligible members.

Process Type: Loyalty Program Process

* Execution Process: Change Member Tier

* Group: Loyalty

* Batch Size: 200

* Retry Count: 3

* Retry Interval: 1,000

Cancel [Progress Indicator] Next

SEE ALSO:

[Salesforce Help: Assess Member Tier Using Loyalty Program Process \(can be outdated or unavailable during release preview\)](#)

Select Resources Without Combing Through Lists

Search for and select resources while designing an action or a condition in loyalty program process rules. Previously, loyalty program managers manually clicked through a cascading list to find your resource. When you select a resource in an action or a condition, search for the resource in the dropdown and select your resource from the search result.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Loyalty Management - Growth or Loyalty Management - Advanced is enabled.

New Action
Credit Points

* Action Name
Credit Points to Gold Tier Members

Input Parameters	Value
* Currency Name	Fixed Value Tokens
* Points to Credit ⓘ	amount
Related Information ⓘ	
Points Expiration Date ⓘ	
Notes	
Output Parameters	
Points Credited ⓘ	

4 results found

- # TransactionAmount
TransactionJournal > TransactionAmount
- # TotalAmount
TransactionJournal > Order > TotalAmount
- # CurrentLiabilityAmount
TransactionJournal > Promotion > CurrentLiabilityAmount
- # MaximumLiabilityAmount
TransactionJournal > Promotion > MaximumLiabilityAmount

Cancel Done

Call Loyalty Management Invocable Actions Using Invocable Namespace

You can now use classes and methods from the Invocable namespace in Apex to call Loyalty Management invocable actions instead of using the LoyaltyManagement namespace's classes.

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

SEE ALSO:

[Apex Reference Guide: Invocable Namespace \(can be outdated or unavailable during release preview\)](#)

Track Member Engagement Easily

Orgs that have enabled the Loyalty Management - Growth license can use member engagement attributes to track and reward members for engaging with the loyalty program.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where the Loyalty Management - Growth license is enabled.

When: This functionality is available from Winter '23.

Easily Monitor Transactions and Prevent Fraud

Use the enhanced Fraud Analytics dashboard to easily filter your loyalty program transactions based on various parameters, such as the count of transactions in a week. And quickly identify potential fraud by identifying uncharacteristic behavior of transactions and members. You can create the Analytics for Loyalty app in Analytics Studio by using the Analytics for Loyalty template.

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

Who: To create an app from the Analytics for Loyalty template, you need the CRM Analytics for the Loyalty Management.

New and Changed Objects in Loyalty Management

Do more with the new and updated Loyalty Management objects.

Track events in members' lifecycle

Use the new `LoyaltyMembershipLifecycle` object.

Use the loyalty program widget configuration to customize the widget content

Use the new `LoyaltyProgramWidget` object.

Create quick promotions and review its configuration

Use the new `IsQuickPromotion` and `PromotionConfiguration` fields on the `Promotion` object.

Review members' referral code

Use the new `ReferralCode` field on the `LoyaltyProgramMember` object.

Specify the prefix, suffix, and length of auto-generated voucher codes

Use the new `AutogeneratedCodeLength`, `CodePrefix`, and `CodeSuffix` fields on the `VoucherDefinition` object.

Specify the benefit image URL and whether a member is allowed to select the benefit

Use the new `ImageUrl` and `IsBenefitSelectionAllowed` fields on the `Benefit` object.

Specify the voucher image URL

Use the new `ImageUrl` field on the `VoucherDefinition` object.

Specify the promotion image URL

Use the new `ImageUrl` field on the `Promotion` object.

SEE ALSO:

[Loyalty Management Developer Guide: LoyaltyMembershipLifecycle](#) (can be outdated or unavailable during release preview)

[Loyalty Management Developer Guide: LoyaltyProgramWidget](#) (can be outdated or unavailable during release preview)

[Loyalty Management Developer Guide: Promotion](#) (can be outdated or unavailable during release preview)

[Loyalty Management Developer Guide: VoucherDefinition](#) (can be outdated or unavailable during release preview)

[Loyalty Management Developer Guide: LoyaltyProgramMember](#) (can be outdated or unavailable during release preview)

[Loyalty Management Developer Guide: Benefit](#) (can be outdated or unavailable during release preview)

New Invocable Action in Loyalty Management

Use the new invocable action for Loyalty Management.

Generate a referral code for a loyalty program member

Use the new `generateMemberReferralCode` action.

New and Changed Loyalty Management Metadata Types

Make the most of the new and changed metadata types of Loyalty Management.

Metadata Type

BEHAVIOR CHANGE: The `executionProcessApiName` field on the `BatchProcessJobDefinition` metadata type now accepts the API name of `TierProcessing` type loyalty program processes

You can now specify the API name of an active `TierProcessing` type loyalty program process that the batch job must run.

Select the lookup field that identifies the Loyalty Program Member records whose tier must be assessed

Use the new `sourceObjectField` field of the `BatchDataSource` subtype on the `BatchProcessJobDefinition` metadata type.

Setting

Enable automatic generation of voucher codes

Use the new `enableAutomaticVoucherCodeGeneration` field on the `IndustriesLoyaltySettings` metadata type.

Salesforce Flow

Generate a referral code for a loyalty program member

Use the new `generateMemberReferralCode` value in the existing `actionType` field, which is on the existing `FlowActionCall` subtype of the `Flow` metadata type.

SEE ALSO:

[Loyalty Management Developer Guide: BatchProcessJobDefinition](#) (can be outdated or unavailable during release preview)

Changed Connect REST API Request Bodies

These request bodies have changes.

Individual Member Enrollments

Individual Member Enrollment Input

This request body has this new property.

`referredByMemberReferralCode`—Specifies the referral code of the loyalty program member who has referred the member.

Corporate Member Enrollments

Corporate Member Enrollment Input

This request body has this new property.

`referredByMemberReferralCode`—Specifies the referral code of the loyalty program member who has referred the member.

Manufacturing Cloud

Do more with enhancements to Sales Agreements and Advanced Account Forecasting. Empower service reps to deliver prompt service to customers and protect customer information with enhancements to Manufacturing for Service features.

IN THIS SECTION:

[Manufacturing for Sales](#)

Improve revenue and profitability with support for up to five decimals for revenue and custom metrics for Sales Agreements. Show metrics that your users need in Agreement Terms by using metric groups for Sales Agreements. Control access to mass update for Sales Agreements. Control access to mass update and import CSV options for Advanced Account Forecasting. Account is no longer mandatory for forecasts. You can now generate forecasts based on other dimensions such as ship-to-location or region.

[Manufacturing for Service](#)

Strengthen customer relationships with enhancements to the Service Console components for Manufacturing Cloud. Use Identity Verification so that customer service representatives (CSRs) can verify the identity of customers and customer-authorized representatives over messages. Use Action Launcher so that CSRs can promptly address customer queries with frequently used actions, Omniscrypt business names, an improved search experience, and more.

Manufacturing for Sales

Improve revenue and profitability with support for up to five decimals for revenue and custom metrics for Sales Agreements. Show metrics that your users need in Agreement Terms by using metric groups for Sales Agreements. Control access to mass update for Sales Agreements. Control access to mass update and import CSV options for Advanced Account Forecasting. Account is no longer mandatory for forecasts. You can now generate forecasts based on other dimensions such as ship-to-location or region.

IN THIS SECTION:

[Sales Agreements Enhancements](#)

Calculate planned and actuals for revenue and custom metrics accurately up to five decimal places, show metrics that your users need in Agreement Terms by using metric groups, and control access to mass update button on Agreement Terms.

[Control Access to Mass Update and Import CSV for Advanced Account Forecasting](#)

Reduce data corruption due to user errors and help maintain data sanctity by controlling access to Mass Update and Import CSV buttons for Advanced Account Forecasting. Control access to the Mass Update and Import CSV buttons is not supported for partner users.

[Account No Longer Mandatory for Forecasts](#)

You can now generate forecasts based on other dimensions such as ship-to-location or region. The updated out-of-the-box Data Processing Engine templates for Advanced Account Forecasting now use the Advanced Account Forecast Set Use object instead of the Advanced Account Forecast Set Partner object.

[Actionable Segmentation for Manufacturing Cloud \(Beta\)](#)

Help your sales reps maximize their engagement outcome with new components.

[Connect REST API for Actionable List Members \(Beta\)](#)

Integrate mobile apps, intranet sites, and third-party web applications with Salesforce using Manufacturing Connect REST APIs.

[New and Changed Tooling Objects](#)

Access more metadata through these new and changed Tooling API objects.

[New and Changed Manufacturing Cloud Metadata Types](#)

Here are the updates to the metadata types in Manufacturing Cloud.

[New Invocable Action in Manufacturing Cloud](#)

Use the new invocable action in Manufacturing Cloud.

Sales Agreements Enhancements

Calculate planned and actuals for revenue and custom metrics accurately up to five decimal places, show metrics that your users need in Agreement Terms by using metric groups, and control access to mass update button on Agreement Terms.

IN THIS SECTION:

[Improve Revenue and Profits with Support for Five Decimals for Metrics on Sales Agreements](#)

Calculate planned and actuals for revenue and custom metrics accurately up to five decimal places. For example, show up to five decimal places for values of key revenue metrics on Sales Agreements for products having prices with more than two decimal places. Support for up to five decimal places isn't available for quantity metrics.

[View Data for Specific Metrics by Using Metric Groups for Sales Agreements](#)

Show metrics that your users need in Agreement Terms by using metric groups for Sales Agreements. Create metric groups in sales agreement settings, so your users can view the specific business metrics in Agreement Terms.

[Control Access to Mass Update Button on Sales Agreement Terms](#)

Reduce data corruption due to user errors and help maintain data sanctity by controlling access to mass update button on Agreement Terms for sales agreements.

Improve Revenue and Profits with Support for Five Decimals for Metrics on Sales Agreements

Calculate planned and actuals for revenue and custom metrics accurately up to five decimal places. For example, show up to five decimal places for values of key revenue metrics on Sales Agreements for products having prices with more than two decimal places. Support for up to five decimal places isn't available for quantity metrics.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Manufacturing Cloud is enabled.

Who: This feature is available to users with the Sales Agreements permission set.

How: From Setup, go to Object Manager. Create custom metric fields for the Sales Agreement Product and Sales Agreement Product Schedule objects with a data type of up to five decimal places.

View Data for Specific Metrics by Using Metric Groups for Sales Agreements

Show metrics that your users need in Agreement Terms by using metric groups for Sales Agreements. Create metric groups in sales agreement settings, so your users can view the specific business metrics in Agreement Terms.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Manufacturing Cloud is enabled.

Who: This feature is available to users with the Sales Agreements permission set.

How: From Setup, in the Quick Find box enter *Manufacturing*, and then select **Sales Agreements**. Enable metric groups, and then create groups of metrics according to your business needs. From the App Launcher, find and select **Sales Agreements**. In Agreement Terms, select the metric group that you want to view the data of.

Sales Agreement					
Account	Status	Start Date	End Date	Schedule Frequency	Total Agreement Amount
Ohana Inc.	Draft	9/1/2022	3/29/2023	Weekly	\$1,805,519.88
Details Agreement Terms Related					
<div> <div>Sales Agreement</div> <div>All Products</div> <div>Metric Group: Revenue</div> <div>Show All Schedules</div> </div>					
PRODUCT NAME	Quantity	TOTAL	Sep 1, 2022	Sep 8, 2022	Sep 15, 2022
Bolts	Actual Amount (USD)	0	0	0	0
	Forecasted Amount (USD)	1,800,000	61,200	61,200	61,200
	Planned Amount (USD)	1,805,519.88	61,200	61,200	61,200
	Discount Percentage	10	10	10	10

SEE ALSO:

[Salesforce Help: Create Metric Groups for Sales Agreements \(can be outdated or unavailable during release preview\)](#)

Control Access to Mass Update Button on Sales Agreement Terms

Reduce data corruption due to user errors and help maintain data sanctity by controlling access to mass update button on Agreement Terms for sales agreements.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Manufacturing Cloud is enabled.

Who: This feature is available to users with the Sales Agreements permission set.

How: In Setup, in the Quick Find box, enter *Users*, and then select **Permission Sets**. Clone the Manufacturing Sales Agreements permission set. To enable access, select the Mass Update for Sales Agreements checkbox in System Permissions. Assign this permission set to users as needed.

SETUP		
Permission Sets		
<div> <div>Permission Set</div> <div>Manufacturing Sales Agreements</div> <div>Find Settings...</div> <div>Clone</div> <div>Manage Assignments</div> </div>		
Permission Set Overview > System Permissions		
System Permissions		
Permission Name	Enabled	Description
Mass Update for Sales Agreements	<input checked="" type="checkbox"/>	Let users access the mass update feature on sales agreements
Use Manufacturing Sales Agreements	<input checked="" type="checkbox"/>	Allow users access to sales agreements

Repeat the steps for the Manufacturing Sales Agreements for Community permission set to enable access to mass update agreement terms on sales agreement for partner users.

SEE ALSO:

[Salesforce Help: Control Access to Mass Update for Sales Agreements \(can be outdated or unavailable during release preview\)](#)

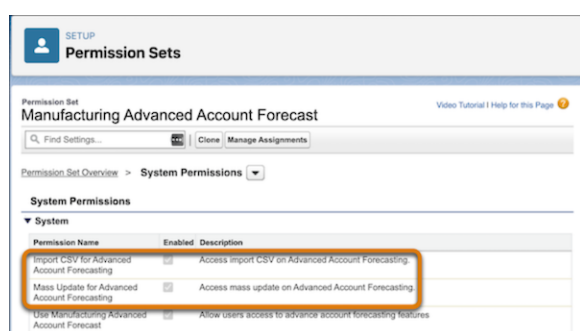
Control Access to Mass Update and Import CSV for Advanced Account Forecasting

Reduce data corruption due to user errors and help maintain data sanctity by controlling access to Mass Update and Import CSV buttons for Advanced Account Forecasting. Control access to the Mass Update and Import CSV buttons is not supported for partner users.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Manufacturing Cloud is enabled.

Who: This feature is available to users with the Advanced Account Forecasting and Advanced Account Forecasting for Experience Cloud permission sets.

How: In Setup, in the Quick Find box, enter *Users*, and then select **Permission Sets**. Clone the Manufacturing Advanced Account Forecasts for Community or the Manufacturing Advanced Account Forecasts permission set. To enable access, select the Mass Update for Advanced Account Forecasting and Import CSV for Advanced Account Forecasting checkboxes in System Permissions. Assign this permission set to partners or users as needed.



SEE ALSO:

[Salesforce Help: Control Access to Mass Update and Import CSV for Advanced Account Forecasting \(can be outdated or unavailable during release preview\)](#)

Account No Longer Mandatory for Forecasts

You can now generate forecasts based on other dimensions such as ship-to-location or region. The updated out-of-the-box Data Processing Engine templates for Advanced Account Forecasting now use the Advanced Account Forecast Set Use object instead of the Advanced Account Forecast Set Partner object.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Manufacturing Cloud is enabled.

Who: This feature is available to users with the Advanced Account Forecasting permission set.

How: From Setup, in Object Manager, create a lookup relationship field on the Advanced Account Forecast Set Use object with a related object for the forecast context, for example, Location. Then, create a new Advanced Account Forecast Set Use record with the forecast context., for example, Location.

Create a new forecast set. In the Forecast Fact Field Mappings for the forecast set, specify location as the forecast context and select Advanced Account Forecast Set Use ID in the Forecast Set field.

Forecast Fact Field Mappings

Forecast Context: Location

Forecast Quantity: Forecasted Quantity

Forecast Status: Status

Period: Period ID

Forecast Revenue: Forecasted Revenue

Forecast Set: Advanced Account Forecast Set Use ID

Advanced Account Forecast Set Partner ID

✓ Advanced Account Forecast Set Use ID

Run the Data Processing Engines to generate forecasts. Forecasts are generated based on location. Click to open a forecast set use record to view the forecasts.

Advanced Forecast						
Details Activity Related						
Forecast Context: Location Forecast Set: By Location Measure Group: Revenue Measure						
Product	Measure	Aggregate	November FY 2022	December FY 2022	January FY 2023	
Product1	Opp Qty	2,580	28	68	72	
	Forecasted Quantity	10,566	143	253	217	
	Forecasted Revenue (USD)	1,056,600	14,300	25,300	21,700	
Product2	Opp Qty	2,936	39	37	21	
	Forecasted Quantity	11,210	184	218	242	
	Forecasted Revenue (USD)	1,121,000	18,400	21,800	24,200	
Product3	Opp Qty	2,506	88	29	83	
	Forecasted Quantity	11,114	368	237	270	
	Forecasted Revenue (USD)	1,111,400	36,800	23,700	27,000	

SEE ALSO:

[Salesforce Help: Define Forecast Set Building Blocks \(can be outdated or unavailable during release preview\)](#)

Actionable Segmentation for Manufacturing Cloud (Beta)

Help your sales reps maximize their engagement outcome with new components.



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](#).

IN THIS SECTION:

[Prioritize Contacts with an Actionable List \(Beta\)](#)

In Lightning App Builder, add the Actionable List Members component (beta) to help sales reps determine which prospects and existing customers to contact first. To further enhance prospect engagement, let list creators assign an OmniScript for providing guidance to sales reps.

[Help Your Sales Reps Reach Their Targets with an Outreach List \(Beta\)](#)

Provide your sales reps with a prioritized and consolidated list of prospects, including existing customers, who they can contact. In the navigation menu, make the new Outreach List tab (beta) available for sales reps.

[Provide Sales Reps an Engagement List \(Beta\)](#)

Provide your sales reps with guidance on prospect outreach and promotion of products and services. In Lightning App Builder, add the Actionable List Engagement component (beta) on the Accounts or Contacts record page.

Prioritize Contacts with an Actionable List (Beta)

In Lightning App Builder, add the Actionable List Members component (beta) to help sales reps determine which prospects and existing customers to contact first. To further enhance prospect engagement, let list creators assign an OmniScript for providing guidance to sales reps.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Manufacturing Cloud is enabled.



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

Who: This feature is available to users with the Analytics Query Service Base and Actionable Segmentation permission sets.

SEE ALSO:

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

Help Your Sales Reps Reach Their Targets with an Outreach List (Beta)

Provide your sales reps with a prioritized and consolidated list of prospects, including existing customers, who they can contact. In the navigation menu, make the new Outreach List tab (beta) available for sales reps.

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

Who: This feature is available to users with the Analytics Query Service Base and Actionable Segmentation permission sets.

SEE ALSO:

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

Provide Sales Reps an Engagement List (Beta)

Provide your sales reps with guidance on prospect outreach and promotion of products and services. In Lightning App Builder, add the Actionable List Engagement component (beta) on the Accounts or Contacts record page.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Manufacturing Cloud is enabled.



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


Who: This feature is available to users with the Actionable Segmentation permission set.

SEE ALSO:

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

Connect REST API for Actionable List Members (Beta)

Integrate mobile apps, intranet sites, and third-party web applications with Salesforce using Manufacturing Connect REST APIs.

 **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](#).

IN THIS SECTION:

[Actionable List Members \(Beta\)](#)

Use the Actionable List Members (beta) Connect API to get actionable list members and update the priority, OmniScript key, and assignees of actionable lists.

Actionable List Members (Beta)

Use the Actionable List Members (beta) Connect API to get actionable list members and update the priority, OmniScript key, and assignees of actionable lists.

 **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](#).

IN THIS SECTION:

[New Connect REST API Resources \(Beta\)](#)

These resources are new.

New Connect REST API Resources (Beta)

These resources are new.

Actionable List Members (Beta)

Get a list of actionable list members in the context of filter criteria

Make a POST request to the new

`/services/data/{version}/connect/sales-excellence/actionable-list-members`

New request body: Search Actionable List Member Input

New response body: Search Actionable List Members

Retrieve the actionable list members for the specified actionable list ID

Make a POST request to the new

`/services/data/{version}/connect/sales-excellence/actionable-list-members/${actionableListId}`

New request body: Search Actionable List Member Input

New response body: Search Actionable List Members

Update the priority and OmniScript key in the ActionableList entity and assignee in the ActionableListMember entity

Make a POST request to the new

`/services/data/{version}/connect/sales-excellence/actionable-list/assignment/${actionableListId}`

New request body: Assign Actionable List Input

New response body: Assign Actionable List

SEE ALSO:

[Salesforce Help: Actionable List Members \(Beta\) \(can be outdated or unavailable during release preview\)](#)

New and Changed Tooling Objects

Access more metadata through these new and changed Tooling API objects.

Display measures in the advanced account forecasts grid for the forecast set.

Use the new `AdvAcctForecastMeasureDef` object.

Retrieve information about the groups for the advanced account forecast set measures or dimensions.

Use the new `AdvAcctFrstDisplayGroup` object.

Manage agreement terms metrics display in sales agreements, and the calculation of the actual quantity of products in sales agreements.

Use the new `AdvAcctFrstDisplayGroupForecastSet` field on the existing `SalesAgreementSettings` object.

SEE ALSO:

[Salesforce Help: Manufacturing Cloud Tooling API Objects \(can be outdated or unavailable during release preview\)](#)

New and Changed Manufacturing Cloud Metadata Types

Here are the updates to the metadata types in Manufacturing Cloud.

Salesforce Flow

Import and convert data from a CSV file into target object records

Use the new `importRecordsFromCsvFile` value in the existing `actionType` field, which is on the `FlowActionCall` subtype of the Flow metadata type.

New Invocable Action in Manufacturing Cloud

Use the new invocable action in Manufacturing Cloud.

Import and convert data from a CSV file into target object records

Use the new `importRecordsFromCsvFile` action.

Manufacturing for Service

Strengthen customer relationships with enhancements to the Service Console components for Manufacturing Cloud. Use Identity Verification so that customer service representatives (CSRs) can verify the identity of customers and customer-authorized representatives over messages. Use Action Launcher so that CSRs can promptly address customer queries with frequently used actions, Omniscript business names, an improved search experience, and more.

IN THIS SECTION:

[Identity Verification](#)

Customer service representatives (CSRs) can now verify the identity of customers and customer-authorized representatives over messages.

[Action Launcher](#)

Search for and launch a flow orchestration in addition to flow, OmniScript, or quick actions from Action Launcher to quickly resolve customer requests. Add up to 10 frequently used actions to Action Launcher. Select deployments easily from a filtered list in Lightning App Builder based on the object record page that you're editing. Customize and localize the business names of OmniScripts in Action Launcher. See keywords in bold text in search results and spot relevant search results quickly.

[Design a Manufacturing Service Process with Service Process Studio](#)

Create a seamless service process tailored to your business needs with the Service Process Studio. Customer service representative (CSRs) can launch a service process to work on a customer request through its entire lifecycle, from intake to fulfillment. The Service Process Studio is an instructional wizard that helps you quickly define data attributes, associate an input request form, add business logic, associate an integration configuration to communicate with your external system, and link to a fulfillment process.

Identity Verification

Customer service representatives (CSRs) can now verify the identity of customers and customer-authorized representatives over messages.

IN THIS SECTION:

[Verify Identity over Messages](#)

Identity Verification now supports Messaging Session, a feature that customer service representatives (CSRs) can use to message customers. CSRs can verify the identity of customers or customer-authorized representatives whose preferred channel of communication is in-app messaging, web chat, or WhatsApp.

[Changed Objects for Engagement Interaction](#)

Do more with the updated Engagement Interaction objects.

SEE ALSO:

[Salesforce Help: Protect the Identity of Your Manufacturing Customers \(can be outdated or unavailable during release preview\)](#)

Verify Identity over Messages

Identity Verification now supports Messaging Session, a feature that customer service representatives (CSRs) can use to message customers. CSRs can verify the identity of customers or customer-authorized representatives whose preferred channel of communication is in-app messaging, web chat, or WhatsApp.

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: Set up Omni-Channel for in-app, web, or WhatsApp messaging. Assign the Messaging User permission set to users of in-app and web messaging. Assign the MessagingUser permission set and the Messaging user permission set to users of WhatsApp messaging. Create and customize the Messaging Session Lightning record page per your requirements and add the identity verification flow to the page.

Changed Objects for Engagement Interaction

Do more with the updated Engagement Interaction objects.

Connect an engagement attendee to a messaging session

Use the updated `EngagementId` field on the EngagementAttendee object.

Save the caller's phone number to understand the context of a subsequent call without revealing the caller's identity

Use the new `PhoneNumber` field on the EngagementInteraction object.

Connect an engagement topic to a messaging session

Use the updated `EngagementId` field on the EngagementTopic object.

Specify a `LoyaltyMemberTier`, `LoyaltyProgramMember`, `Voucher`, `TransactionJournal`, or a custom object record as a topic of engagement

Use the updated `TopicId` field on the `EngagementTopic` object.

Action Launcher

Search for and launch a flow orchestration in addition to flow, OmniScript, or quick actions from Action Launcher to quickly resolve customer requests. Add up to 10 frequently used actions to Action Launcher. Select deployments easily from a filtered list in Lightning App Builder based on the object record page that you're editing. Customize and localize the business names of OmniScripts in Action Launcher. See keywords in bold text in search results and spot relevant search results quickly.

IN THIS SECTION:

[Provide Faster Customer Service](#)

Add flow orchestrations to Action Launcher so that customer service representatives (CSRs) can quickly launch the flow orchestrations and respond to customer queries fast.

[Boost the Productivity of Customer Service Representatives](#)

Add up to 10 frequently used actions to Action Launcher so that your customer service representatives (CSRs) can respond quickly to repetitive customer requests and save time.

[Find Action Launcher Deployments Quickly](#)

Select an Action Launcher deployment from a filtered list based on the object record page that you're editing in Lightning App Builder.

[Reflect the Aim of OmniScripts in Their Business Names](#)

Modify the business name of an OmniScript by using the Console Tab Title field in OmniStudio. Your customer service representatives can then quickly identify and launch the OmniScripts from Action Launcher.

[Make OmniScripts Easily Identifiable by Localizing OmniScript Names](#)

Your global customer service representatives can quickly identify and launch localized OmniScripts in Action Launcher and save time. Localize OmniScript names by translating an OmniScript name, creating a label for the name, and then adding the label to the Console Tab Title field in OmniStudio.

[Spot Relevant Search Results Quickly](#)

Now the search keywords in Action Launcher search results appear in bold for the name and description of actions, giving customer service representatives better readability for search results.

[Changes in the Action Launcher Metadata Type](#)

Make the most of the changed Action Launcher metadata type.

SEE ALSO:

[Salesforce Help: Launch Actions to Resolve Customer Queries with Action Launcher \(can be outdated or unavailable during release preview\)](#)

Provide Faster Customer Service

Add flow orchestrations to Action Launcher so that customer service representatives (CSRs) can quickly launch the flow orchestrations and respond to customer queries fast.

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 **Flows** and **quick actions**. Then, select the related flow orchestrations that you want to include in Action Launcher. Add the Action Launcher component to a Lightning record page in Lightning App Builder. In the Properties panel of the component, select the deployment that you created from the Action Launcher Deployment dropdown list. Activate your page if necessary.

Boost the Productivity of Customer Service Representatives

Add up to 10 frequently used actions to Action Launcher so that your customer service representatives (CSRs) can respond quickly to repetitive customer requests and save time.

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 related actions that you want to add to Action Launcher. Select up to 10 frequently used actions. Add the Action Launcher component to a Lightning record page in Lightning App Builder. In the Properties panel of the component, select the deployment that you created from the Action Launcher Deployment dropdown list. Activate your page if necessary.

Find Action Launcher Deployments Quickly

Select an Action Launcher deployment from a filtered list based on the object record page that you're editing in Lightning App Builder.

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 related actions that you want to include in Action Launcher. Select up to 10 frequently used actions to show on Action Launcher. Add the Action Launcher component to a Lightning record page in Lightning App Builder. In the Properties panel of the component, view the filtered list of deployments based on the object record page that you're editing. Select the required deployment.

Reflect the Aim of OmniScripts in Their Business Names

Modify the business name of an OmniScript by using the Console Tab Title field in OmniStudio. Your customer service representatives can then quickly identify and launch the OmniScripts from Action Launcher.

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.

Make OmniScripts Easily Identifiable by Localizing OmniScript Names

Your global customer service representatives can quickly identify and launch localized OmniScripts in Action Launcher and save time. Localize OmniScript names by translating an OmniScript name, creating a label for the name, and then adding the label to the Console Tab Title field in OmniStudio.

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Spot Relevant Search Results Quickly

Now the search keywords in Action Launcher search results appear in bold for the name and description of actions, giving customer service representatives better readability for search results.

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.

Changes in the Action Launcher Metadata Type

Make the most of the changed Action Launcher metadata type.

Indicate whether an action is frequently accessed by users

Use the new `IsFrequentAction` field of the `RecordActionSelectableItem` subtype on the `RecordActionDeployment` metadata type.

Store the sequence number of a frequently used action that's shown on Action Launcher

Use the new `FrequentActionSequenceNbr` field of the `RecordActionSelectableItem` subtype on the `RecordActionDeployment` metadata type.

Design a Manufacturing Service Process with Service Process Studio

Create a seamless service process tailored to your business needs with the Service Process Studio. Customer service representative (CSRs) can launch a service process to work on a customer request through its entire lifecycle, from intake to fulfillment. The Service Process Studio is an instructional wizard that helps you quickly define data attributes, associate an input request form, add business logic, associate an integration configuration to communicate with your external system, and link to a fulfillment process.

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 *Service Process Studio*, and then select **Service Process Studio**. Click **New Service Process**.

The screenshot displays the 'Service Process Studio' interface for configuring a new service process named 'Address Update'. The left sidebar lists various configuration steps: Details, Data Attributes, Request Form, Preprocessor, Integration Definition, and Fulfillment Flow. The 'Details' section is currently active, showing fields for 'Process Name' (set to 'Address Update') and 'API Name' (set to 'Address_Update'). Below these are fields for 'Short Description' and 'Long Description', which includes a rich text editor with a toolbar. At the top right, there are buttons for 'View Summary', 'Activate', and 'Save'. A 'Next' button is located at the bottom right of the main configuration area.

Deploy these service processes on record pages using the Action Launcher component so that they're accessible to CSRs at their fingertips.

Public Sector Solutions

Understand your constituents better by gaining deeper insights into their relationships. Capture referrals with ease using guided flows. Extend monetary assistance to eligible constituents. Deliver services to constituents using programs. Set up more of your org with ease with new assistants in Guided Setup.

IN THIS SECTION:

[Connect REST APIs](#)

Do more with these new Public Sector Solutions connect REST APIs.

[Composable Case Management](#)

Use a guided flow to capture referral details, gain insights into constituent relationships, capture and track relationships within a household, and easily let users access notes on interactions with constituents.

[Support Constituent Needs using Benefit Management](#)

To help individuals, families, and organizations achieve self-sufficiency, offer monetary assistance. Extend resources or credits in the form of social insurance, tax benefits, subsidies, food and housing assistance, or direct cash assistance.

[Administer Services to Constituents Using Programs](#)

Deliver services that improve the wellbeing of individuals, families, and communities by enrolling them in programs. Create programs such as job readiness, youth development, refugee settlement, housing services, and child welfare. Under each program, assign and track benefits to eligible constituents.

[Leverage Data Model for Grantmaking](#)

Use the Grants Management data models to create funding opportunities, set grant budgets, award grants, and manage disbursements.

[Easily Configure Your Org Using Guided Setup](#)

Get more of your org set up with new Guided Setup assistants. Follow simple, clear steps to configure a feature so that your users can be productive faster.

[New and Changed Objects in Public Sector Solutions](#)

Do more with these new and changed Public Sector Solutions objects.

[New and Changed Public Sector Solutions Metadata Types](#)

Here are the updates to the metadata types in Public Sector Solutions.

[New Invocable Action in Public Sector Solutions](#)

Use the new invocable action in Public Sector Solutions.

[Connect REST API](#)

Integrate mobile apps, intranet sites, and third-party web applications with Salesforce using Connect REST API.

[PublicSectrStln Namespace](#)

The new PublicSectrStln namespace provides new classes and properties for Public Sector Solutions.

SEE ALSO:

[Public Sector Solutions Developer Guide: Business API](#)

Connect REST APIs

Do more with these new Public Sector Solutions connect REST APIs.

Create an Action Plan Template item from an Action Plan Template

Make a POST request to the new

/connect/action-plan/actionplantemplateversion/{*actionPlantemplateId*} resource.

New request body: Action Plan Template Items Input

New response body: Action Plan Output

View an Action Plan Template item created from an Action Plan Template

Make a GET request to the new

/connect/action-plan/actionplantemplateversion/{*actionPlantemplateId*} resource.

New response body: Action Plan Template Items

Composable Case Management

Use a guided flow to capture referral details, gain insights into constituent relationships, capture and track relationships within a household, and easily let users access notes on interactions with constituents.

IN THIS SECTION:

[Capture Referral Details More Efficiently Using Guided Flows and Assessments](#)

To help your intake officers capture essential details about a referral and upload supporting documents, configure and use guided flows. To screen referrals and create a case from referrals, use assessments. Support your constituents who are in need of special services by referring them to appropriate agencies and organizations.

[Gain Deeper Insight into Constituent Relationships](#)

Explore interconnected relationships between people and companies on the web. Einstein Relationship Insights helps discover critical relationships by exploring disparate data sources, including unstructured web pages and structured information like Salesforce records. Gain insights into a constituent's relationships with other individuals and organizations along with evidence documenting the relationship.

[Capture Key Relationships in Households or Groups of Constituents](#)

Define roles that capture and illustrate relationships between constituents or between groups or businesses, such as between a stepfather and stepson in a household. Track changes in these relationships over a course of time.

[Let Caseworkers Easily Access Notes with Interaction Summaries](#)

Users can now access notes on interactions with constituents if the users have access to a parent record.

[Enhanced Care Plans](#)

Use care plans to provide support to constituents in need. Create goal-oriented care plans and efficiently manage tasks in care plans to help improve constituents' lives.

SEE ALSO:

[Public Sector Solutions Toolkit](#)

Capture Referral Details More Efficiently Using Guided Flows and Assessments

To help your intake officers capture essential details about a referral and upload supporting documents, configure and use guided flows. To screen referrals and create a case from referrals, use assessments. Support your constituents who are in need of special services by referring them to appropriate agencies and organizations.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Public Sector Solutions is enabled.

SEE ALSO:

[Manage Case Referrals in Public Sector Solutions](#)

Gain Deeper Insight into Constituent Relationships

Explore interconnected relationships between people and companies on the web. Einstein Relationship Insights helps discover critical relationships by exploring disparate data sources, including unstructured web pages and structured information like Salesforce records. Gain insights into a constituent's relationships with other individuals and organizations along with evidence documenting the relationship.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Public Sector Solutions is enabled.

Capture Key Relationships in Households or Groups of Constituents

Define roles that capture and illustrate relationships between constituents or between groups or businesses, such as between a stepfather and stepson in a household. Track changes in these relationships over a course of time.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Public Sector Solutions is enabled.

Let Caseworkers Easily Access Notes with Interaction Summaries

Users can now access notes on interactions with constituents if the users have access to a parent record.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Public Sector Solutions is enabled.

Why: If there are notes captured in a case, anyone who has access to the case can automatically access the notes as well. They can also use rich text formatting and a larger notes-taking canvas to capture notes more effectively.

Enhanced Care Plans

Use care plans to provide support to constituents in need. Create goal-oriented care plans and efficiently manage tasks in care plans to help improve constituents' lives.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Public Sector Solutions is enabled.

IN THIS SECTION:

[Make Your Care Plans More Goal-Oriented](#)

Identify a top goal for your care plan and build intermediate goals and benefits that cater to the personalized needs of your constituents and their wellbeing. Easily manage care plans, goals, and benefits with a hierarchy view.

[Manage Tasks in Your Care Plans Efficiently](#)

Add, update, exclude, or delete tasks that are part of your action plan template from the care plan guided flow while creating the care plan, benefit assignments, or goal assignments.

SEE ALSO:

[Care Plans in Public Sector Solutions](#)

Make Your Care Plans More Goal-Oriented

Identify a top goal for your care plan and build intermediate goals and benefits that cater to the personalized needs of your constituents and their wellbeing. Easily manage care plans, goals, and benefits with a hierarchy view.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Public Sector Solutions is enabled.

Why: A caseworker assigned to child welfare services can determine that family reunification is a top goal for a household. To achieve this goal, caseworkers can define intermediate goals such as financial stability and anger management and benefits such as resume-building workshops and anger management counseling.

Manage Tasks in Your Care Plans Efficiently

Add, update, exclude, or delete tasks that are part of your action plan template from the care plan guided flow while creating the care plan, benefit assignments, or goal assignments.

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](#)

Support Constituent Needs using Benefit Management

To help individuals, families, and organizations achieve self-sufficiency, offer monetary assistance. Extend resources or credits in the form of social insurance, tax benefits, subsidies, food and housing assistance, or direct cash assistance.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Public Sector Solutions is enabled.

Why: Offer benefits to constituents and specify who is eligible to receive these benefits based on their income, expenses, household size, and other criteria. Review applications and determine whether the applicant is eligible and approve them based on the criteria you've specified. Assign a benefit to eligible constituents and specify details such as the amount and frequency of the benefit. To create automatic disbursement schedules, configure the benefit assignment.

Enable constituents to search for benefits they're eligible for and apply for them. Enable them to track the status of their applications and benefits assigned to them, and view a schedule of disbursements they can expect to receive. Also, share the reasons behind these benefit eligibility decisions with your constituents.

Administer Services to Constituents Using Programs

Deliver services that improve the wellbeing of individuals, families, and communities by enrolling them in programs. Create programs such as job readiness, youth development, refugee settlement, housing services, and child welfare. Under each program, assign and track benefits to eligible constituents.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Public Sector Solutions is enabled.

Leverage Data Model for Grantmaking

Use the Grants Management data models to create funding opportunities, set grant budgets, award grants, and manage disbursements.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Public Sector Solutions is enabled.

When: You can use the data model in your org starting on February 13, 2023.

Easily Configure Your Org Using Guided Setup

Get more of your org set up with new Guided Setup assistants. Follow simple, clear steps to configure a feature so that your users can be productive faster.

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 Complaint Intake Flow:** Configure an intake guided flow to quickly capture information from constituents who report concerns that need investigation.
- **Set Up Case Creation Flow:** Create customized care plans to help constituents with urgent needs for social services and support.
- **Configure Group Membership to Manage Households:** Define a group of individuals such as a household or a trust and provide them with personalized services or support.
- **Configure Case Referrals:** Set up Case Referral to understand the needs of constituents, conduct assessments, and deliver the right service by referring them to service providers.
- **Configure Actionable Relationship Center:** Enable your users to understand their constituents' relationships by providing convenient and interactive graphs in the Actionable Relationship Center.
- **Configure Timelines:** Give users a chronological view of a constituent's history within your agencies.
- **Configure Life Events and Milestones:** Help users understand constituents better by capturing their significant life events and milestones with the Life Events or Business Milestones component.
- **Configure Interaction Summary for Notes:** Set up Interaction Summary to let users take detailed notes of their meetings and conversations with constituents or other case participants.

How: Navigate to Guided Setup from Setup.

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 relationships between accounts

Use the new AccountAccountRelation object.

Store information on relationships between contacts

Use the new ContactContactRelation object.

Store information on the type of relationship between participants

Use the new PartyRoleRelation object.

Add the self referred, result category, outbound source, and program fields to your referral

Use the new `IsSelfReferred`, `ResultCategory`, `OutboundSource`, and `Program` fields in the `Referral` object.

Indicate whether you want to select partial attributes when creating an action plan using the Connect API

Use the new `ShouldAllowOverride` in the `ActionPlan` object.

New and Changed Public Sector Solutions Metadata Types

Here are the updates to the metadata types in Public Sector Solutions.

Salesforce Flow

Create a benefit disbursement for an eligible benefit assignment

Use the new `createBenefitDisbursement` value in the existing `actionType` field, which is on the `FlowActionCall` subtype of the `Flow` metadata type.

Settings

Enable the benefit and goal sharing feature in your org

Use the new `enableBenefitAndGoalSharingPref` field on the `IndustriesSettings` metadata type.

Enable the program and benefit management feature in your org

Use the new `enableBenefitManagementPreference` field on the `IndustriesSettings` metadata type.

New Invocable Action in Public Sector Solutions

Use the new invocable action in Public Sector Solutions.

Create a benefit disbursement for an eligible benefit assignment

Use the new `createBenefitDisbursement` action.

Connect REST API

Integrate mobile apps, intranet sites, and third-party web applications with Salesforce using Connect REST API.

IN THIS SECTION:

[Changed Connect REST API Request Bodies](#)

These request bodies have changes.

[Changed Connect REST API Response Bodies](#)

These response bodies have changes.

Changed Connect REST API Request Bodies

These request bodies have changes.

Care Plan Input

This request body has this new property.

- `problems`—Problems of a care plan.

Care Plan Task Input

This request body has these new properties.

- `isRequired`—Indicates whether the task assigned to a care plan is required.
- `taskDefinitionId`—Task definition ID assigned to a care plan.
- `taskId`—Task ID assigned to a care plan.

Goal Assignment Input

This request body has these new properties.

- `associatedBenefitAssignments`—Benefit assignments associated with a goal assignment.
- `associatedSubGoalAssignments`—Goal assignments associated with a goal assignment.

Changed Connect REST API Response Bodies

These response bodies have changes.

Care Plan Task

This response body has these new properties.

- `dependentTasks`—List of the dependent tasks.
- `displayOrder`—Dependent tasks display order.
- `isRequired`—Indicates whether the dependent task record is required.

Care Plan Definition Output

This response body has this new property.

- `problemDefinition`—Problem definitions of the care plan.

Goal Assignment

This response body has these new properties.

- `associatedBenefitAssignments`—Benefit assignments associated with a goal assignment.
- `associatedSubGoalAssignments`—Goal assignments associated with a goal assignment.

Goal Definition Output

This response body has these new properties.

- `associatedBenefits`—Benefits associated with a goal definition.
- `associatedSubGoals`—Goal assignments associated with a goal definition.

PublicSectorSfIn Namespace

The new `PublicSectorSfIn` namespace provides new classes and properties for Public Sector Solutions.

New Classes**Contains details about the disbursement for the eligible benefit assignment that is created or is to be previewed**

Use the new `BenefitDisbursementIAOutput` class.

Contains the benefit disbursement details for an eligible benefit assignment

Use the new `BenefitDisbursementDetail` class.

Contains the benefit disbursement adjustment details for the eligible benefit assignment

Use the new `BenefitDisbursementAdjDetail` class.

SEE ALSO:

[Public Sector Solutions Developer Guide: PublicSectorSltN Namespace](#)

Net Zero Cloud

You can now offer more fuel types, manage social and governance data, and consolidate emissions from your subsidiaries and business units by extending carbon accounting in your Net Zero Cloud org. You can also generate disclosures and compliance reports using a guided process.

IN THIS SECTION:

[Take Advantage of More Fuel Types in Emissions Calculations](#)

Enhance emissions calculations by including more fuel types, units of measure, and their conversion factors. Add a conversion factor for a fuel type and its source and destination unit of measure. To calculate the emissions, select the fuel type in the energy use record and specify the relevant conversion factors to standard units of measure.

[Manage Social and Governance Data](#)

Keep on top of the economic, social, and environmental impacts within your organization. Enter, store, extract, and report quantitative disclosures in social governance reports with reference to GRI Standards. Generate reports and dashboards to track progress toward GRI reporting.

[Manage Carbon Accounting for Extended Organizational Boundaries](#)

If your company is a conglomerate that has fully owned subsidiaries or largely independent business units, or has grown through mergers and acquisitions, you must account for emissions from your company and subsidiaries, business units, or your mergers. Perform carbon accounting for extended organizational boundaries, such as subsidiaries, within a single organization.

[Let Partner Community Users Use Experience Cloud to Perform Carbon Accounting](#)

Let partner community users, such as franchisees or investors, access Net Zero Cloud objects using Experience Cloud and the Experience Cloud site that you create. Partner community users can submit their emissions data for carbon accounting and consolidation across partners. Create accounts for partners to access Net Zero objects for carbon accounting and share data using sharing sets and sharing rule categories.

[Easily Generate Disclosures Through the Disclosure and Compliance Hub](#)

Generate formatted disclosures using a guided process to extract data from qualitative and quantitative responses to questionnaires. Use questionnaires to gather specific information, such as the use of budget for a grant, or energy and carbon emissions reporting, or for generic information, such as environmental, social, and governance reporting. Using the Disclosure and Compliance Hub, you can extract data, answer questions, and order responses logically. You can also collaborate on the responses with users and create a collection of approved reusable responses. You can use the responses to produce formatted documents.

[Generate a GRI Standards Report with the Disclosure and Compliance Hub Template](#)

Easily generate a GRI standards report with formatted questionnaires to gather the necessary information. Give your customers a smooth experience to generate GRI standards report using the Net Zero Cloud Disclosures For GRI Standards managed package.

[Generate a CDP Report with the Disclosure and Compliance Hub Template](#)

Easily generate a CDP report with formatted questionnaires to gather the necessary information. Give your customers a smooth experience to generate CDP report using the Net Zero Cloud Disclosures For CDP managed package.

[Identify Gaps and Lead Your DEI Initiatives by Using CRM Analytics](#)

Get 360-degree visibility into your workforce representation data by using the new DEI Insights dashboard. Top management can use the multi-dimensional visualizations to identify diversity, equality, and inclusion (DEI) gaps and assess the areas of opportunity to build more impactful programs. You can see data by gender and ethnicity and analyze the distribution of employees by various parameters, such as demographics, organizational rank, and veteran status.

[Plan for Short-Term Emission Reductions by Using Monthly Air Travel Emission Predictions](#)

Use the Monthly Air Travel Emissions section of the Predicted Air Travel Emissions dashboard to get predictions about your company's air travel carbon emissions for the next six months. View an analysis of the emissions in the past six months and the predicted emissions for the next six months, and prepare a short-term plan for reducing the emissions.

[Reduce Your Company's Carbon Footprint by Using Supply Chain Emission Predictions](#)

Get predictions about carbon emissions from your company's supply chain activities. View the predicted data and the percentage change in emissions from the baseline year for each USEEIO category. Then prepare a plan to reduce the emissions. Predictions are based on data in the baseline year, your company's growth factors, and the USEEIO categories related to the growth factors. Predictions are calculated based on either the spent amount or the quantity of scope 3 procurement items.

[New and Changed Objects for Net Zero Cloud](#)

Do more with the new and changed Net Zero Cloud objects.

[New and Changed Net Zero Cloud Metadata Types](#)

Make the most of the new and changed metadata types of Net Zero Cloud.

Take Advantage of More Fuel Types in Emissions Calculations

Enhance emissions calculations by including more fuel types, units of measure, and their conversion factors. Add a conversion factor for a fuel type and its source and destination unit of measure. To calculate the emissions, select the fuel type in the energy use record and specify the relevant conversion factors to standard units of measure.

Where: This change applies to Lightning Experience in Professional, Enterprise, Unlimited, and Developer editions with Net Zero Cloud.

SEE ALSO:

[Salesforce Help: Configure Custom Values for Net Zero Cloud \(can be outdated or unavailable during release preview\)](#)

Manage Social and Governance Data

Keep on top of the economic, social, and environmental impacts within your organization. Enter, store, extract, and report quantitative disclosures in social governance reports with reference to GRI Standards. Generate reports and dashboards to track progress toward GRI reporting.

Where: This change applies to Lightning Experience in Professional, Enterprise, Unlimited, and Developer editions where the Net Zero Cloud Growth license is enabled.

How: To generate reports for social and governance data, from Setup, in the Quick Find box, enter *Net Zero*, and then select **Net Zero Settings**. Turn on **Manage Social and Governance**.

SEE ALSO:

[Salesforce Help: Enable Net Zero Cloud Settings \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Report Social and Governance Data with Net Zero Cloud \(can be outdated or unavailable during release preview\)](#)

Manage Carbon Accounting for Extended Organizational Boundaries

If your company is a conglomerate that has fully owned subsidiaries or largely independent business units, or has grown through mergers and acquisitions, you must account for emissions from your company and subsidiaries, business units, or your mergers. Perform carbon accounting for extended organizational boundaries, such as subsidiaries, within a single organization.

The subsidiaries can provide their consumption and procurement data across the various emissions sources in Net Zero Cloud. Net Zero Cloud calculates the emissions inventory based on the consumption and procurement data. The parent company can consolidate emissions data within the organizational structure for effective greenhouse gas management and reporting for yourself and your ventures.

Where: This change applies to Lightning Experience in Professional, Enterprise, Unlimited, and Developer editions where the Net Zero Cloud Growth license is enabled.

How: From Setup, in the Quick Find box, enter *Net Zero*, and then select **Net Zero Settings**. Turn on **Manage Carbon Accounting for Extended Organizational Boundaries**.

SEE ALSO:

[Salesforce Help: Enable Net Zero Cloud Settings \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Carbon Accounting for Extended Organizational Boundaries \(can be outdated or unavailable during release preview\)](#)

Let Partner Community Users Use Experience Cloud to Perform Carbon Accounting

Let partner community users, such as franchisees or investors, access Net Zero Cloud objects using Experience Cloud and the Experience Cloud site that you create. Partner community users can submit their emissions data for carbon accounting and consolidation across partners. Create accounts for partners to access Net Zero objects for carbon accounting and share data using sharing sets and sharing rule categories.

Where: This change applies to Lightning Experience in Professional, Enterprise, Unlimited, and Developer editions where the Net Zero Cloud Growth license and Net Zero Cloud - Multi-Organization Support add-on license are enabled.

SEE ALSO:

[Salesforce Help: Enable Net Zero Cloud Settings \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Let Partner Community Users Perform Carbon Accounting in Net Zero Cloud \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Carbon Accounting for Partner Community Users \(can be outdated or unavailable during release preview\)](#)

Easily Generate Disclosures Through the Disclosure and Compliance Hub

Generate formatted disclosures using a guided process to extract data from qualitative and quantitative responses to questionnaires. Use questionnaires to gather specific information, such as the use of budget for a grant, or energy and carbon emissions reporting, or for generic information, such as environmental, social, and governance reporting. Using the Disclosure and Compliance Hub, you can extract data, answer questions, and order responses logically. You can also collaborate on the responses with users and create a collection of approved reusable responses. You can use the responses to produce formatted documents.

Where: This change applies to Lightning Experience in Professional, Enterprise, Unlimited, and Developer editions where the Net Zero Cloud Growth license is enabled.

How: To generate disclosures, from Setup, in the Quick Find box, enter *Disclosure and Compliance Hub*, and then select **Disclosure and Compliance Hub Settings**. Turn on **Manage Disclosure and Compliance Hub**.

SEE ALSO:

[Salesforce Help: Disclosure and Compliance Hub \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Generate Disclosures Using Disclosure and Compliance Hub \(can be outdated or unavailable during release preview\)](#)

Generate a GRI Standards Report with the Disclosure and Compliance Hub Template

Easily generate a GRI standards report with formatted questionnaires to gather the necessary information. Give your customers a smooth experience to generate GRI standards report using the Net Zero Cloud Disclosures For GRI Standards managed package.

Where: This change applies to Lightning Experience in Professional, Enterprise, Unlimited, and Developer editions where the Net Zero Cloud Growth license is enabled.

How: Install the [Net Zero Cloud Disclosures for GRI Standards](#) package on the same site as your Net Zero Cloud. To generate a disclosure, from Setup, in the Quick Find box, enter *Disclosure and Compliance Hub*, and then select **Disclosure and Compliance Hub Settings**. Turn on **Manage Disclosure and Compliance Hub**.

SEE ALSO:

[Salesforce Help: Net Zero Cloud Disclosures For GRI Standards Package \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Use Net Zero Cloud Disclosures Template for GRI Standards to Create Disclosures \(can be outdated or unavailable during release preview\)](#)

Generate a CDP Report with the Disclosure and Compliance Hub Template

Easily generate a CDP report with formatted questionnaires to gather the necessary information. Give your customers a smooth experience to generate CDP report using the Net Zero Cloud Disclosures For CDP managed package.

Where: This change applies to Lightning Experience in Professional, Enterprise, Unlimited, and Developer editions where the Net Zero Cloud Growth license is enabled.

How: Install the [Net Zero Cloud Disclosures for CDP](#) package on the same site as your Net Zero Cloud. To generate a disclosure, from Setup, in the Quick Find box, enter *Disclosure and Compliance Hub*, and then select **Disclosure and Compliance Hub Settings**. Turn on **Manage Disclosure and Compliance Hub**.

SEE ALSO:

[Salesforce Help: Net Zero Cloud Disclosures For CDP Package \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Use Net Zero Cloud Disclosures Template for CDP to Create Disclosures \(can be outdated or unavailable during release preview\)](#)

Identify Gaps and Lead Your DEI Initiatives by Using CRM Analytics

Get 360-degree visibility into your workforce representation data by using the new DEI Insights dashboard. Top management can use the multi-dimensional visualizations to identify diversity, equality, and inclusion (DEI) gaps and assess the areas of opportunity to build more impactful programs. You can see data by gender and ethnicity and analyze the distribution of employees by various parameters, such as demographics, organizational rank, and veteran status.

Where: This feature is available for an additional cost in Lightning Experience in Professional, Enterprise, Unlimited, and Developer editions where Net Zero Cloud is enabled.

Who: To use the DEI Insights dashboard in Net Zero Cloud, you need the CRM Analytics Plus Admin and Net Zero Analytics Admin permissions.

How: From Setup, in the Quick Find box, enter *Net Zero*, and then select **Net Zero Configurations**. Set up CRM Analytics and enable DEI Analytics.

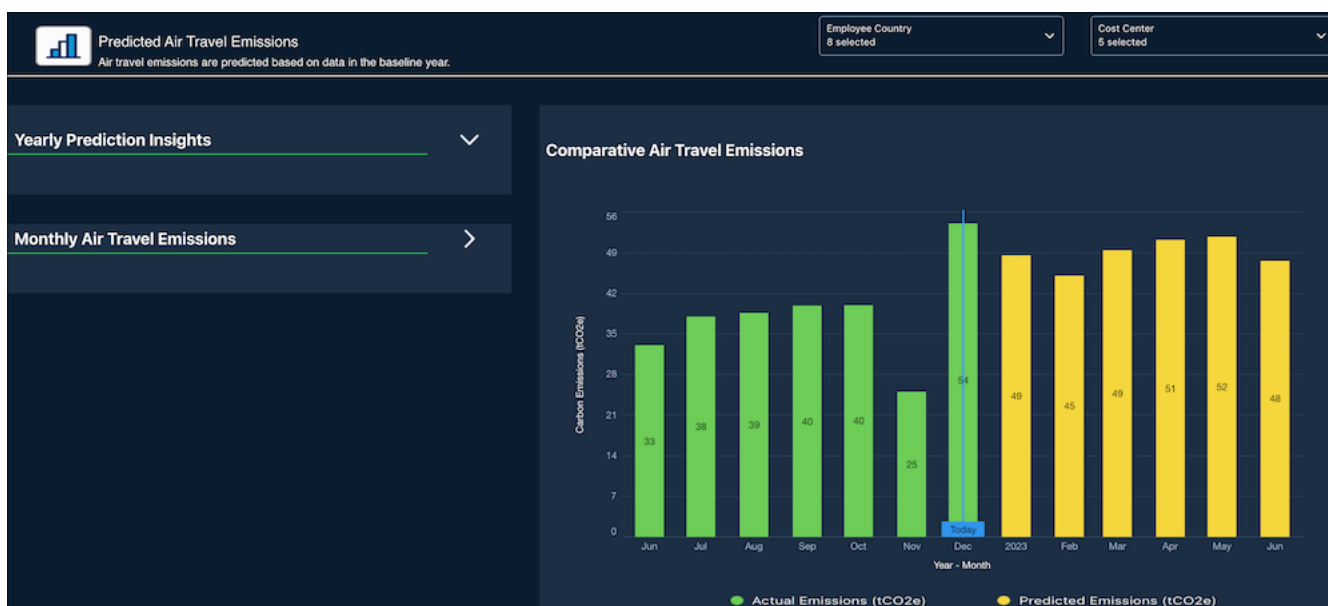
Plan for Short-Term Emission Reductions by Using Monthly Air Travel Emission Predictions

Use the Monthly Air Travel Emissions section of the Predicted Air Travel Emissions dashboard to get predictions about your company's air travel carbon emissions for the next six months. View an analysis of the emissions in the past six months and the predicted emissions for the next six months, and prepare a short-term plan for reducing the emissions.

Where: This change applies to Lightning Experience in Professional, Enterprise, Unlimited, and Developer editions that have Net Zero Cloud.

Who: The Predicted Air Travel Emissions dashboard is available to users who have the CRM Analytics for Net Zero add-on license.

Why: You can filter predictions by multiple employee countries and cost centers.



SEE ALSO:

[Salesforce Help: Predictions for Carbon Emission from Air Travel \(can be outdated or unavailable during release preview\)](#)

Reduce Your Company's Carbon Footprint by Using Supply Chain Emission Predictions

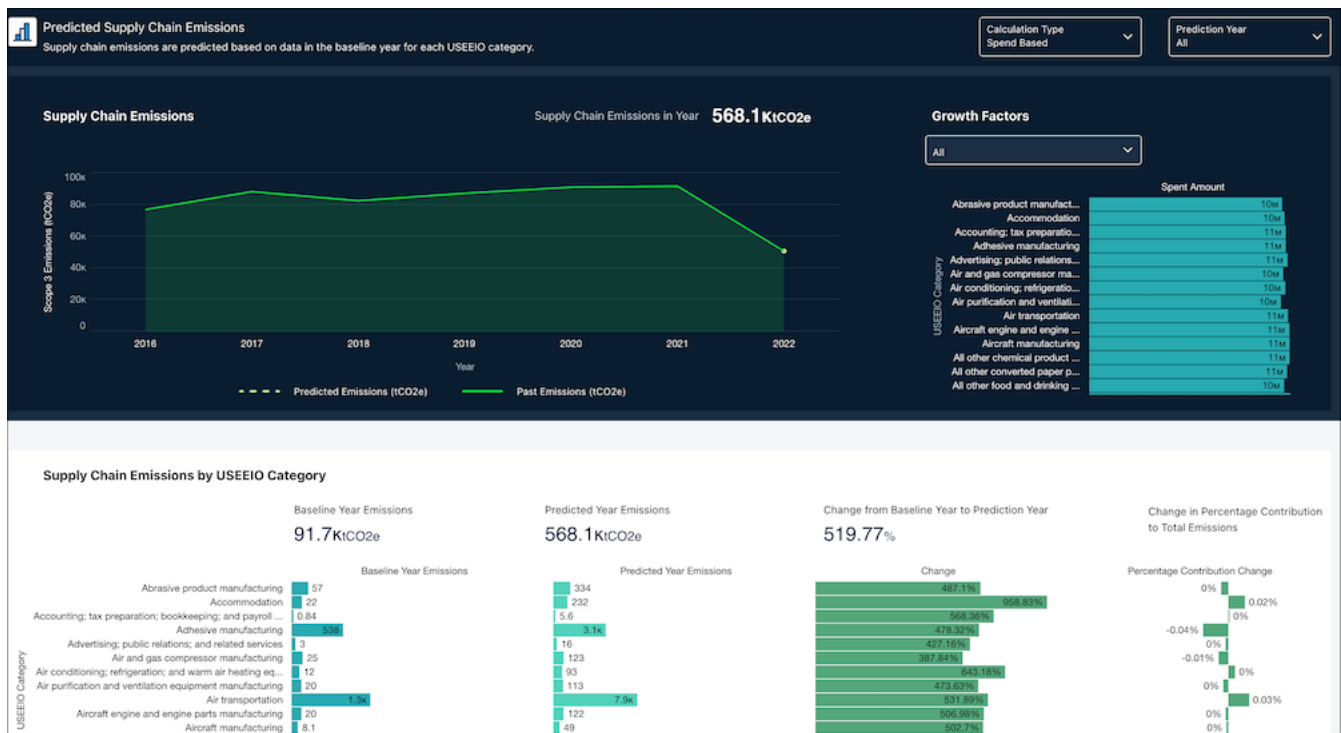
Get predictions about carbon emissions from your company's supply chain activities. View the predicted data and the percentage change in emissions from the baseline year for each USEEIO category. Then prepare a plan to reduce the emissions. Predictions are based on data in the baseline year, your company's growth factors, and the USEEIO categories related to the growth factors. Predictions are calculated based on either the spent amount or the quantity of scope 3 procurement items.

Where: This change applies to Lightning Experience in Professional, Enterprise, Unlimited, and Developer editions that have Net Zero Cloud.

Who: The External Data to Predict Supply Chain Emissions template and the Prediction of Supply Chain Emissions template are available to users who have the CRM Analytics for Net Zero add-on license.

How: Go to CRM Analytics Studio. To convert external data for predicting supply chain emissions into a CRM Analytics dataset, create an app by using the External Data to Predict Supply Chain Emissions template. Then, to use the generated dataset for predicting about supply chain emissions, create an app by using the Prediction of Supply Chain Emissions template. The app generates a preconfigured recipe that then generates the emission predictions.

Go to the Predicted Supply Emissions dashboard to view the predicted emission details. You can filter the predictions by the required year and by the growth factors.



SEE ALSO:

[Salesforce Help: Predictions for Carbon Emission from Supply Chain Activities \(can be outdated or unavailable during release preview\)](#)

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.

Custom fuel types available

- Use the new FuelTypeRefId field of the StnryAssetEnrgyUse object.
- Use the new FuelTypeRefId field of the OtherEmssnFctrSetItem object.
- Use the new CrbnEmssnScopeAllocValFuelTypeRefId field of the CrbnEmssnScopeAllocVal object.

Additional fields introduced to existing objects

- Use the new Uniqueldx fields of the AnnualEmssnInventory object.

- Use the new AccountNameId fields of the StnryAssetEnvrSrc object.
- Use the new PcmEmssnFctrSetItemId field of the GroundTravelEnrgyUse object.

New Objects

Here are the new data objects in Net Zero Cloud.

Manage the disclosure details that a company shares

Use the new Disclosure object.

Manage a corporate reporting period that is used for stakeholder disclosure reports

Use the new DisclsReportingPeriod object.

Manage statistics about employees based on their demographic information

Use the new EmployeeDemographicSum object.

Manage statistics according to various categories of incidents in an organization

Use the new OrgIncidentSummary object.

Manage statistics about the direct economic value generated and distributed by an organization

Use the new EconomicPerformanceSum object.

Manage initiatives taken by an organization to communicate and train the employee on anti-corruption policies and procedures

Use the new AntiCorruptionInitSum object.

Manage statistics about the disclosure of business entity information to all tax jurisdictions

Use the new TaxDisclosureSummary object.

Manage statistics about benefits provided to employees and the usage of benefits

Use the new EmpBenefitSummary object.

Manage statistics about training and development provided to upskill the employees

Use the new EmployeeDevelopmentSum object.

Manage the diversity of governance bodies and employees

Use the new DivrsEquityInclSum object.

Manage social contributions made to political and non-political organizations

Use the new SocialContributionSum object.

Manage the financial assistance received from governments

Use the new GovtFinancialAsstSum object.

Here are the new setup objects in Net Zero Cloud.

Manage the types of disclosures that are done by an individual or an organization

Use the new DisclosureType object.

Manage information that defines a disclosure type

Use the new DisclosureDefinition object.

Manage the version information about the disclosure definition

Use the new DisclosureDefinitionVersion object.

Manage the configuration about the clause category

Use the new ClauseCatgConfiguration object.

Manage the additional fuel types defined by a customer

Use the new FuelType object.

Map the additional fuel types to their corresponding unit of measure values defined by a customer

Use the new FuelTypeSustnUom object.

Manage the unit of measure conversion for the additional fuel types defined by a customer

Use the new SustnUomConversion object.

New and Changed Net Zero Cloud Metadata Types

Make the most of the new and changed metadata types of Net Zero Cloud.

Metadata Type

Add a fuel type value

Use the new FuelType metadata type.

Add the version information for a disclosure definition

Use the new DisclosureDefinitionVersion metadata type.

Classify your disclosure clauses by adding a disclosure clause category

Use the new ClauseCatgConfiguration metadata type.

Create a disclosure type

Use the new DisclosureDefinition metadata type.

Create types of disclosures that are done by an individual or an organization

Use the new DisclosureType metadata type.

Define a mapping between a custom fuel type and its corresponding unit of measure (UOM) values

Use the new FuelTypeSustnUom metadata type.

Specify a unit of measure conversion for custom fuel types

Use the new SustnUomConversion metadata type.

Settings

Enable carbon accounting for extended organizational boundaries

Use the new `enableSCEExpansionUseCase` field on the IndustriesSettings metadata type.

Enable social and governance

Use the new `enableSCSNGManagement` field on the IndustriesSettings metadata type.

Enable the disclosure hub reports

Use the new `enableDisclsReprtFeatureOff` field on the IndustriesSettings metadata type.

SEE ALSO:

[Net Zero Cloud Developer Guide: Metadata API Types](#)

Salesforce for Education

Salesforce for Education includes products that connect insights across recruitment, admissions, and student success for a unified view of every learner's journey—from prospective students to engaged alumni.

Learn about what's in this release in the [Salesforce for Education Release Notes](#).

Salesforce for Nonprofits

Salesforce for Nonprofits includes products that meet the unique needs of nonprofits. These products empower organizations to go from siloed data to actionable insights, transforming constituent engagements into lifelong relationships.

Learn about what's in this release in the [Salesforce for Nonprofits Release Notes](#).

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, added decision tables to flows, and much more.

IN THIS SECTION:

[Actionable Segmentation \(Beta\)](#)

Segment similar client profiles, curate them, and design timely and personalized client outreach programs with Actionable Segmentation (beta).

[AI Accelerator](#)

Create use cases with AI Accelerator to get prediction scores in real time and related NBA recommendations. Customize the configuration of feature extractors to extract features in batches or in real time, or upload sample features.

[Action Launcher](#)

Indicate whether an action is frequently used by users. Store the sequence number of a frequently used action that's shown on Action Launcher.

[Actionable List Members \(Beta\)](#)

Use the Actionable List Members (beta) Connect API to get actionable list members and update the priority, OmniScript key, and assignees of actionable lists.

[Business Rules Engine](#)

Work with expression sets faster with the usability enhancements in Expression Set Builder. Navigate to expression set versions from the expression set list view with ease by using the new Versions tab. Enable Business Rules Engine features in scratch orgs.

[Data Consumption Framework](#)

Save time connecting to external systems with integrations built for scale.

[Data Processing Engine](#)

Use Analytics From Dataset as the source type at the time of defining source nodes in a Data Processing Engine definition. Save the data transformed by a Data Processing Engine definition as a new Analytics dataset, or update a dataset with the transformed data. Use custom nodes (beta) in Data Processing Engine definitions to run the custom logic defined in the nodes. To verify that your definition runs effectively, select the nodes in the definition for which you want to get a count of output records. Then view the results in Monitor Workflow Services.

[Decision Explorer](#)

Decision Explorer is a collection of setup objects that provide insight into why a business rule generated a specific result.

[Discovery Framework](#)

Adopt the new enhancements to the Discovery Framework feature to give your customers an improved user experience when filling in an assessment form. Easily build and configure forms with the new QR code or Signature Discovery Framework OmniScript elements. Create forms with prefilled data from previous assessments and cut down the time needed to fill in an assessment.

[New and Changed Discovery Framework Objects and Fields](#)

Do more with new and updated Discovery Framework objects.

[Einstein Relationship Insights](#)

Analyze Einstein's recommended relationships deeply and filter the types of relationships that you want to explore. Get updated when Einstein finds news and job change updates for the records that you follow. View relationship paths that show how you're connected with your prospects. Learn about the updated Einstein Relationship Insights experience. Explore relationships with person and company record objects, as active record objects are soon to be deprecated.

[Engagement](#)

Do more with changed engagement objects.

[Integration Definitions](#)

Quickly set up integrations with different external endpoints and leverage the integration definitions across Salesforce Industries.

[Intelligent Document Reader](#)

Extract information from identity documents and experience the improved UI.

[Intelligent Form Reader](#)

Extract information from identity documents and experience the improved UI.

[Industry Integration Solutions](#)

Save the time and effort by entering the required authentication settings for connecting to an external system when enabling the integration. View the latest version details of the integration app, and update the integration app to the latest version. Update the named credentials created in the previous release to adhere to the latest format. The simplified API registration process makes it easier to enable access to the Industry API and get started with building your integrations.

[Rebate Management](#)

Improve rebate payout processing performance by using the new Aggregate by Member with Custom Node (Beta) Data Processing Engine definition or by adding the new custom node Compute Valid Transaction Journals Per Rebate Type (Beta) to existing definitions.

[Record Alerts](#)

The Record Alerts feature allows you to store and retrieve record alerts, and set up categorization of record alerts on the objects records.

[Service Process Studio](#)

Boost agent productivity and customer satisfaction by creating service processes that are unique to your business. The Service Process Studio is a one-stop solution to create end-to-end service processes from intake to fulfillment.

Actionable Segmentation (Beta)

Segment similar client profiles, curate them, and design timely and personalized client outreach programs with Actionable Segmentation (beta).



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

IN THIS SECTION:

[Build Customer Segments and Personalize Outreach Initiatives with Actionable Segmentation \(Beta\)](#)

Actionable list definitions and actionable lists are the key elements of the Actionable Segmentation (beta) feature. Actionable list definitions enable you to create datasets containing records having information across multiple related objects according to your business requirements. Actionable lists help you to create and curate meaningful client segments filtering on datasets associated with actionable list definitions. Actionable lists help your sales teams to build and strengthen customer relationships by enabling them to design timely and targeted personalized client outreach initiatives such as send emails or add to campaigns.

New Objects in Actionable Segmentation (Beta)

Use standard objects to create actionable lists.

New Metadata Types (Beta)

Get to know the metadata types of Actionable Segmentation (beta).

Build Customer Segments and Personalize Outreach Initiatives with Actionable Segmentation (Beta)

Actionable list definitions and actionable lists are the key elements of the Actionable Segmentation (beta) feature. Actionable list definitions enable you to create datasets containing records having information across multiple related objects according to your business requirements. Actionable lists help you to create and curate meaningful client segments filtering on datasets associated with actionable list definitions. Actionable lists help your sales teams to build and strengthen customer relationships by enabling them to design timely and targeted personalized client outreach initiatives such as send emails or add to campaigns.

Where: This feature is available in Lightning Experience.

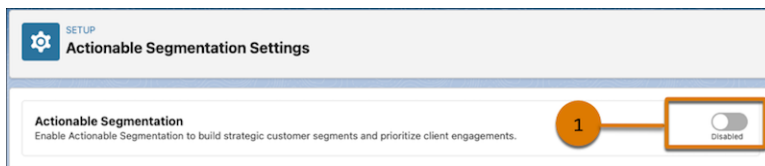


Note: This feature is a Beta Service. Customer may opt to try such Beta Service in its sole discretion. Any use of the Beta Service is subject to the applicable Beta Services Terms provided at [Agreements and Terms](#).

Who: To use this feature, users need the Industry Sales Excellence Add On with Actionable Segmentation permission set.

Why: The Actionable Segmentation feature enables you to leverage the vast and rich data present in Salesforce to build actionable lists to perform targeted outreach and increase the revenue.

How: From Setup, in the Quick Find box, enter *Actionable Segmentation Settings*, and then select **Actionable Segmentation Settings**. Enable **Actionable Segmentation** (1).



SEE ALSO:

[Actionable Segmentation](#)

New Objects in Actionable Segmentation (Beta)

Use standard objects to create actionable lists.



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](#).

Create actionable lists

Use the ActionableList object.

Capture basic information such as reference record and member status for actionable list members

Use the ActionableListMember object.

Capture list column details such as name and display order for list members

Use the ActionableListColumn object.

New Metadata Types (Beta)

Get to know the metadata types of Actionable Segmentation (beta).



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

Create actionable list definitions

Use the ActionableListDefinition metadata type.

Configure visible columns for actionable lists

Use the ActionableListDatasetColumn metadata type.

Configure list member statuses

Use the ActionableListMemberStatus metadata type.

AI Accelerator

Create use cases with AI Accelerator to get prediction scores in real time and related NBA recommendations. Customize the configuration of feature extractors to extract features in batches or in real time, or upload sample features.

IN THIS SECTION:

[Create Predictive Use Cases](#)

Create use cases using AI Accelerator to get prediction scores and related Next Best Action (NBA) recommendations. Customize the use cases by defining a model, specifying field mappings to store extracted features and scoring responses, and configuring a feature extractor.

[Compute Features in Real Time or in Batches, and Upload Sample Features](#)

Customize the configuration of feature extractors for your use cases to compute features in real time or in batches, or upload a CSV file with the sample features.

[Changed Objects in AI Accelerator](#)

Generate predictions and recommendations using specific platforms. Extract features for the machine learning model in batches or in real time. Upload sample features for the model.

[Changed Tooling Objects in AI Accelerator](#)

Generate predictions and recommendations using specific platforms. Extract features for the machine learning model in batches or in real time. Upload sample features for the model.

[Connect REST API](#)

Integrate mobile apps, intranet sites, and third-party web applications with Salesforce using Connect REST API.

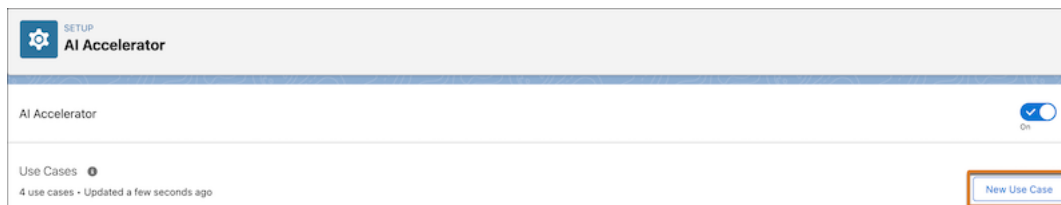
Create Predictive Use Cases

Create use cases using AI Accelerator to get prediction scores and related Next Best Action (NBA) recommendations. Customize the use cases by defining a model, specifying field mappings to store extracted features and scoring responses, and configuring a feature extractor.

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

Who: Users with the CRM for Communications Cloud license or the Communications Cloud Intelligence license can create use cases in AI Accelerator.

How: On the AI Accelerator Setup page, click **New Use Case**.



SEE ALSO:

[Salesforce Help: Create a Use Case \(can be outdated or unavailable during release preview\)](#)

Compute Features in Real Time or in Batches, and Upload Sample Features

Customize the configuration of feature extractors for your use cases to compute features in real time or in batches, or upload a CSV file with the sample features.

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

Who: Users with the CRM for Communications Cloud license or the Communications Cloud Intelligence license can configure feature extractors for use cases in AI Accelerator.

How: Create or edit a use case on the AI Accelerator Setup page. Add or edit a feature extractor configuration for the use case and select a feature input type, such as Batch Input or Real Time Input.

SEE ALSO:

[Salesforce Help: Customize the Configuration of Feature Extractors \(can be outdated or unavailable during release preview\)](#)

Changed Objects in AI Accelerator

Generate predictions and recommendations using specific platforms. Extract features for the machine learning model in batches or in real time. Upload sample features for the model.

Specify the type of feature input for the model to use to generate predictions

Use the new `FeatureInputType` field on the existing `AIFeatureExtractor` object.

Specify the identifier of the input source for batch job-generated features that a model can use to generate predictions

Use the new `BatchInputSourceIdentifier` field on the existing `AIFeatureExtractor` object.

View the JSON file with sample features that provide context for the feature extractor

Use the new `InputContext` field on the existing `AIFeatureExtractor` object.

Specify the name of the platform that AI Accelerator can use to generate recommendations

Use the new `RecommendationSource` field on the existing `AIUsecaseDefinition` object.

View the type of user who created a use case definition

Use the new `CreatorType` field on the existing `AIUsecaseDefinition` object.

Specify the name of the platform on which AI Accelerator can create and deploy a machine learning model

Use the new `PredictionPlatform` field on the existing `AIUsecaseModel` object.

SEE ALSO:

[Salesforce Help: AI Accelerator Standard Objects \(can be outdated or unavailable during release preview\)](#)

Changed Tooling Objects in AI Accelerator

Generate predictions and recommendations using specific platforms. Extract features for the machine learning model in batches or in real time. Upload sample features for the model.

Specify the type of feature input for the model to use to generate predictions

Use the new `FeatureInputType` field on the existing `AIFeatureExtractor` object.

Specify the identifier of the input source for batch job-generated features that a model can use to generate predictions

Use the new `BatchInputSourceIdentifier` field on the existing `AIFeatureExtractor` object.

View the JSON file with sample features that provide context for the feature extractor

Use the new `InputContext` field on the existing `AIFeatureExtractor` object.

Specify the name of the platform that AI Accelerator can use to generate recommendations

Use the new `RecommendationSource` field on the existing `AIUsecaseDefinition` object.

View the type of user who created a use case definition

Use the new `CreatorType` field on the existing `AIUsecaseDefinition` object.

Specify the name of the platform on which AI Accelerator can create and deploy a machine learning model

Use the new `PredictionPlatform` field on the existing `AIUsecaseModel` object.

SEE ALSO:

[Salesforce Help: AI Accelerator Tooling Objects \(can be outdated or unavailable during release preview\)](#)

Connect REST API

Integrate mobile apps, intranet sites, and third-party web applications with Salesforce using Connect REST API.

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.

AI Accelerator

Prediction Output

This response body has these new properties.

- `featureExtractorIdentifier`—Specifies the API name of the feature extractor record.
- `batchDataSource`—Specifies the batch data source name where batch-computed features are stored.
- `featureInputType`—Specifies the type of feature input used in generating predictions.

Action Launcher

Indicate whether an action is frequently used by users. Store the sequence number of a frequently used action that's shown on Action Launcher.

IN THIS SECTION:

[Changes in the Action Launcher Metadata Type](#)

Make the most of the changed Action Launcher metadata type.

SEE ALSO:

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

Changes in the Action Launcher Metadata Type

Make the most of the changed Action Launcher metadata type.

Indicate whether an action is frequently accessed by users

Use the new `IsFrequentAction` field of the `RecordActionSelectableItem` subtype on the `RecordActionDeployment` metadata type.

Store the sequence number of a frequently used action that's shown on Action Launcher

Use the new `FrequentActionSequenceNbr` field of the `RecordActionSelectableItem` subtype on the `RecordActionDeployment` metadata type.

Actionable List Members (Beta)

Use the Actionable List Members (beta) Connect API to get actionable list members and update the priority, OmniScript key, and assignees of actionable lists.



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](#).

IN THIS SECTION:

[New Connect REST API Resources \(Beta\)](#)

These resources are new.

New Connect REST API Resources (Beta)

These resources are new.

Actionable List Members (Beta)

Get a list of actionable list members in the context of filter criteria

Make a POST request to the new

`/services/data/{version}/connect/sales-excellence/actionable-list-members`

New request body: Search Actionable List Member Input

New response body: Search Actionable List Members

Retrieve the actionable list members for the specified actionable list ID

Make a POST request to the new

`/services/data/{version}/connect/sales-excellence/actionable-list-members/${actionableListId}`

New request body: Search Actionable List Member Input

New response body: Search Actionable List Members

Update the priority and OmniScript key in the ActionableList entity and assignee in the ActionableListMember entity

Make a POST request to the new

`/services/data/{version}/connect/sales-excellence/actionable-list/assignment/${actionableListId}`

New request body: Assign Actionable List Input

New response body: Assign Actionable List

SEE ALSO:

[Salesforce Help: Actionable List Members \(Beta\) \(can be outdated or unavailable during release preview\)](#)

Business Rules Engine

Work with expression sets faster with the usability enhancements in Expression Set Builder. Navigate to expression set versions from the expression set list view with ease by using the new Versions tab. Enable Business Rules Engine features in scratch orgs.

IN THIS SECTION:

[Expression Set Builder Enhancements](#)

View, create, modify, and deactivate expression set versions quickly and easily by using the enhanced Expression Set Builder.

[View Expression Set Versions with a Single Click](#)

When you select an expression set from the expression set list view, you're now taken to the new Versions tab directly. All the versions in an expression set are listed under this new tab. Previously, when you selected an expression set, the Details tab of the expression set record appeared. You then selected the Related tab to see the expression set versions.

[Migrate Expression Sets Quickly and Easily](#)

When you migrate an expression set from a source org to a target org using Package Manager, the entire expression set is now migrated along with its dependencies like decision matrices, decision tables, and subexpressions. Previously, to migrate an expression set successfully, you had to first migrate its dependent elements separately.

[Scratch Org Feature](#)

Use the `BusinessRulesEngine` feature to enable lookup tables and expression sets in your scratch orgs. To use the BusinessRulesEngine feature, add the feature to your scratch org definition file.

[New Metadata Types](#)

Get to know the new Business Rules Engine Metadata API types.

Expression Set Builder Enhancements

View, create, modify, and deactivate expression set versions quickly and easily by using the enhanced Expression Set Builder.

IN THIS SECTION:

[Deactivate an Expression Set Version from the Builder](#)

You can now deactivate an expression set version directly from the Expression Set Builder. Previously, deactivation of versions was possible only by selecting a version from the Related tab of an expression set, and then editing the version properties.

[View Expression Set Steps Quickly with Collapsed View](#)

When you open an expression set version in the Expression Set Builder, the version steps now appear in a collapsed view. The collapsed view loads faster. You also have the option to expand steps to see the step configurations. To view all version steps in detail, or to return to the collapsed view, toggle between the views in the builder.

[Track Duplicate Expression Set Steps Easily](#)

When you duplicate an expression set version step, to help you differentiate between the original step and the copy, the name of the duplicate step is prefixed with *Copy <number> of*. Multiple copies of the same step are identified by the incremental number in the name of the copy. Previously, a copy of a step retained the name of the original step, making it difficult to identify the copies.

[Internal and External Simulation Views Renamed Detailed and Concise Views](#)

To reflect the level of detail shown when an expression set version is simulated from Expression Set Builder, we renamed the Internal View and External View options to Detailed View and Concise View respectively. The default is Detailed View.

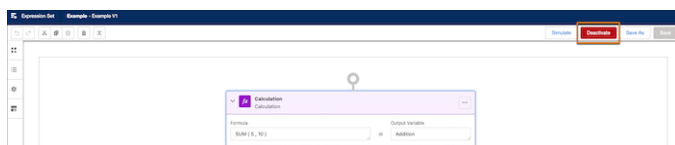
Deactivate an Expression Set Version from the Builder

You can now deactivate an expression set version directly from the Expression Set Builder. Previously, deactivation of versions was possible only by selecting a version from the Related tab of an expression set, and then editing the version properties.

Where: This change applies to Lightning Experience in Professional, Enterprise, Unlimited, and Developer editions where Financial Services Cloud, Health Cloud, Manufacturing Cloud, Insurance, or Public Sector Solutions is enabled.

Who: Users with the Rules Engine Designer permission set can activate or deactivate an expression set version from the Expression Set Builder.

How: Open an active expression set version in the Expression Set Builder, and click **Deactivate**.



SEE ALSO:


[Salesforce Help: Deactivate an Expression Set Version](#)

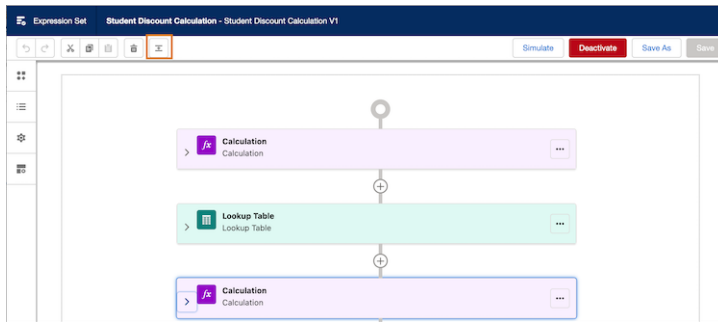
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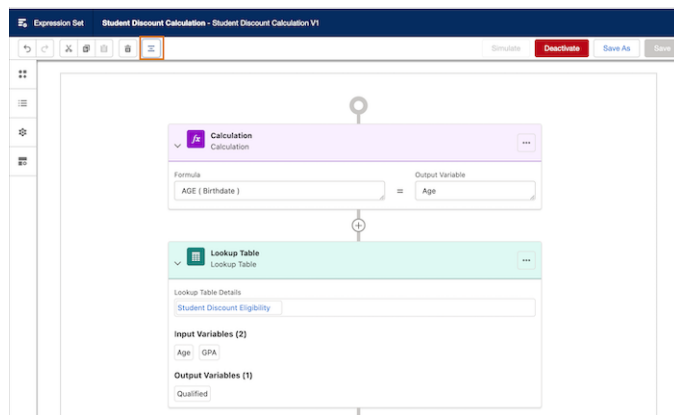
Where: This change applies to Lightning Experience in Professional, Enterprise, Unlimited, and Developer editions where Financial Services Cloud, Health Cloud, Manufacturing Cloud, Insurance, or Public Sector Solutions is enabled.

How:

- To expand all steps in the expression set version, click .



- To return to the default collapsed view, click .



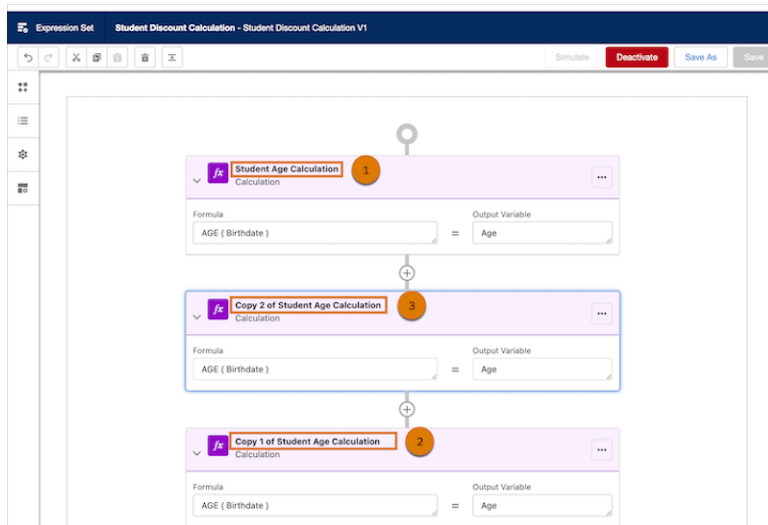
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Where: This change applies to Lightning Experience in Professional, Enterprise, Unlimited, and Developer editions where Financial Services Cloud, Health Cloud, Manufacturing Cloud, Insurance, or Public Sector Solutions is enabled.

Who: Users with the Rules Engine Designer permission set can create and modify expression set versions.

Why: When you duplicate an expression set step, or copy and paste a step in the Expression Set Builder, the copies appear in this format: *Copy <number> of <step name>*.



Here, 1 represents the name of the original step, 2 represents the name of the step's first copy, and 3 represents the name of the step's second copy.

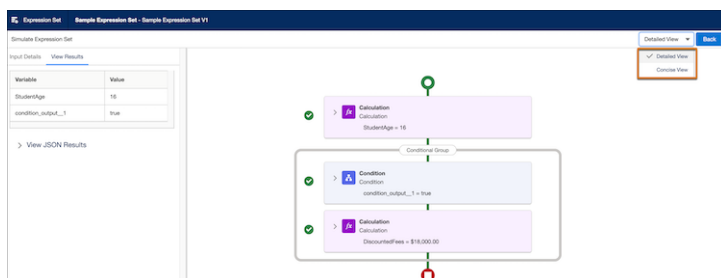
Internal and External Simulation Views Renamed Detailed and Concise Views

To reflect the level of detail shown when an expression set version is simulated from Expression Set Builder, we renamed the Internal View and External View options to Detailed View and Concise View respectively. The default is Detailed View.

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 use this feature, users need the Rule Engine Designer or Rule Engine Runtime permission set.

How: To switch from the default Detailed View to Concise View, select the option from the views dropdown list.



View Expression Set Versions with a Single Click

When you select an expression set from the expression set list view, you're now taken to the new Versions tab directly. All the versions in an expression set are listed under this new tab. Previously, when you selected an expression set, the Details tab of the expression set record appeared. You then selected the Related tab to see the expression set versions.

Where: This change applies to Lightning Experience in Professional, Enterprise, Unlimited, and Developer editions where Financial Services Cloud, Health Cloud, Manufacturing Cloud, Insurance, or Public Sector Solutions is enabled.

Who: Users with Rules Engine Designer or Rules Engine Runtime permission sets can view an expression set's versions by selecting an expression set from the list view.

How: From the Business Rules Engine app menu, select **Expression Sets**. Select an expression set from the list. The Versions tab displays the list of versions in the selected expression set.

Version Name	Active	Rank	Start Date Time
Example V1	<input type="checkbox"/>		19/10/2022, 10:53 am
Example V2	<input type="checkbox"/>		19/10/2022, 10:53 am

Migrate Expression Sets Quickly and Easily

When you migrate an expression set from a source org to a target org using Package Manager, the entire expression set is now migrated along with its dependencies like decision matrices, decision tables, and subexpressions. Previously, to migrate an expression set successfully, you had to first migrate its dependent elements separately.

Where: This change applies to Lightning Experience in Professional, Enterprise, Unlimited, and Developer editions where Financial Services Cloud, Health Cloud, Manufacturing Cloud, Insurance, or Public Sector Solutions is enabled.

SEE ALSO:

[Salesforce Help: Migrate an Expression Set by Using Package Manager](#)

Scratch Org Feature

Use the *BusinessRulesEngine* feature to enable lookup tables and expression sets in your scratch orgs. To use the BusinessRulesEngine feature, add the feature to your scratch org definition file.

Where: This change applies to Professional, Enterprise, Group, and Developer scratch org editions.

SEE ALSO:

[Salesforce DX Developer Guide: Build Your Own Scratch Org Definition File \(can be outdated or unavailable during release preview\)](#)

New Metadata Types

Get to know the new Business Rules Engine Metadata API types.

Metadata Type

Create the explainability action version from the action log generated by the associated application

Use the new ExplainabilityActionVersion metadata type.

Create the explainability definition from the log that is generated by the associated application's action

Use the new ExplainabilityActionDefinition type.

Configure subtypes of an application

Use the new ApplicationSubtypeDefinition metadata type.

Configure business process within an application domain

Use the new BusinessProcessTypeDefinition metadata type.

SEE ALSO:

[Industries Common Resources Developer Guide: Business Rules Engine Metadata Types](#)

Data Consumption Framework

Save time connecting to external systems with integrations built for scale.

IN THIS SECTION:

[Connect to External Systems with Integrations Built for Scale](#)

With Data Consumption Framework, your agents can access complete and current data from external systems without leaving Salesforce. The framework extends the Continuations framework in FlexCards and OmniScripts by providing them with integration definition capabilities for better real-time performance. In addition, agents can use the framework to initiate asynchronous flows that call APIs at scale to support more simultaneous users.

Connect to External Systems with Integrations Built for Scale

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

Why: Using the Data Consumption Framework to integrate your external systems with Salesforce provides these benefits:

- The ability to use External Services-based or Apex-based integrations.
- A connection to MuleSoft to enable integrations per your business needs.



Note: With Data Consumption Framework, you can use third-party middleware instead of Mulesoft integration.

- Better control on Apex behavior because integration attributes that the Apex classes consume can be defined in a no-code manner.
- Scalable integration pattern support for asynchronous API call-outs using Lightning Web Components, FlexCards, Flows, and OmniScripts. Data Consumption Framework prevents delays in the user experience and flow threads for long-running processes and high-volume API call-outs.

SEE ALSO:

[Data Consumption Framework](#)

Data Processing Engine

Use Analytics From Dataset as the source type at the time of defining source nodes in a Data Processing Engine definition. Save the data transformed by a Data Processing Engine definition as a new Analytics dataset, or update a dataset with the transformed data. Use custom nodes (beta) in Data Processing Engine definitions to run the custom logic defined in the nodes. To verify that your definition runs effectively, select the nodes in the definition for which you want to get a count of output records. Then view the results in Monitor Workflow Services.

IN THIS SECTION:

[Use Analytics Dataset as a Data Source](#)

You can now use an Analytics dataset as a data source in source nodes in a Data Processing Engine definition. Previously, only standard and custom objects were supported as data sources in source nodes. Using Analytics datasets as data sources improves performance because the data doesn't need multiple syncs.

[Save Transformed Data in Analytics Datasets for Improved Performance](#)

After transforming your data with a Data Processing Engine definition, you can now save the transformed data as a new dataset in Analytics, or select an existing dataset and overwrite it with the transformed data. You can select a target folder in Analytics to store your dataset. You can also define a filter condition to specify who can access the records from the new dataset.

[Use Custom Nodes in Data Processing Engine Definitions \(Beta\)](#)

Custom nodes (beta) contain customized logic that's specific to your industry's business requirements. Custom nodes (beta) are shipped as part of your Industries solution and are related to a process type. When you create a Data Processing Engine definition, any custom nodes (beta) for the definition's process type are available for you to add to the definition. A custom node (beta) works like other nodes in a Data Processing Engine definition and performs the action defined in the node.

[View the Number of Records Processed by a Definition's Nodes](#)

You can now see the number of records processed in specific nodes in a Data Processing Engine definition. At the time of running a definition, select the nodes for which you want to get information on the number of records processed. You can select up to 10 nodes from the definition. To troubleshoot issues after a definition is run, view details of the processed records.

[New and Changed Data Processing Engine Metadata Types](#)

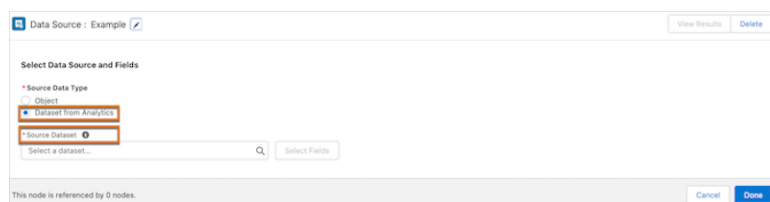
Make the most of the new and changed metadata types of Data Processing Engine.

Use Analytics Dataset as a Data Source

You can now use an Analytics dataset as a data source in source nodes in a Data Processing Engine definition. Previously, only standard and custom objects were supported as data sources in source nodes. Using Analytics datasets as data sources improves performance because the data doesn't need multiple syncs.

Where: This change applies to Lightning Experience in Enterprise, Professional, and Unlimited editions where Accounting Subledger, 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: In the Data Source node of a Data Processing Engine definition, select **Dataset From Analytics** as the source data type, and then select an available dataset.



SEE ALSO:

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

Save Transformed Data in Analytics Datasets for Improved Performance

After transforming your data with a Data Processing Engine definition, you can now save the transformed data as a new dataset in Analytics, or select an existing dataset and overwrite it with the transformed data. You can select a target folder in Analytics to store your dataset. You can also define a filter condition to specify who can access the records from the new dataset.

Where: This change applies to Lightning Experience in Enterprise, Professional, and Unlimited editions where Accounting Subledger, 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: In a Writeback Object node of a Data Processing Engine definition, select **Save as dataset in Analytics** as the target type. Next, define the mapping between the source fields and the dataset fields, specify the sharing inheritance settings, define the filter condition to access records in the dataset, and select the target Analytics folder to store the dataset.

SEE ALSO:

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

Use Custom Nodes in Data Processing Engine Definitions (Beta)

Custom nodes (beta) contain customized logic that's specific to your industry's business requirements. Custom nodes (beta) are shipped as part of your Industries solution and are related to a process type. When you create a Data Processing Engine definition, any custom nodes (beta) for the definition's process type are available for you to add to the definition. A custom node (beta) works like other nodes in a Data Processing Engine definition and performs the action defined in the node.

Where: This change applies to Lightning Experience in Enterprise, Professional, and Unlimited editions where Accounting Subledger, Financial Services Cloud, Manufacturing Cloud, Rebate Management, Loyalty Management, or Provider Search in Health Cloud is enabled. Data Pipelines must be enabled in Salesforce. The availability of a custom node (beta) is subject to the node being shipped with your cloud solution.



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 a Data Processing Engine definition, add a node and select the type as **Custom (Beta)**, enter the details, and save the node. Next, select a custom node (beta) and the source node for the custom node. The parameters from the selected custom node are populated. You can then enter or select input values for the node's parameters.

SEE ALSO:

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

View the Number of Records Processed by a Definition's Nodes

You can now see the number of records processed in specific nodes in a Data Processing Engine definition. At the time of running a definition, select the nodes for which you want to get information on the number of records processed. You can select up to 10 nodes from the definition. To troubleshoot issues after a definition is run, view details of the processed records.

Where: This change applies to Lightning Experience in Enterprise, Professional, and Unlimited editions where Accounting Subledger, 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: Open an active Data Processing Engine definition in the builder and click **Run Definition**. Select **Show output record count for nodes**, select the nodes for which you want to get the number of records that are processed, and run the definition.

The screenshot shows the 'Run Data Processing Engine Definition' dialog. At the top, there's a section 'Select Nodes for Output Record Count' with a checkbox 'Show output record count for nodes' which is checked. Below this is a 'Select Nodes' section with a search bar and a list of nodes. Two nodes are selected and highlighted with orange boxes: 'ActiveProgramRebateTypeForRebatePrograms' (joins) and 'FilterActiveRebateProgramMembers' (filters). At the bottom, there are 'Back' and 'Run Definition' buttons.

Node Name	Node Type
<input checked="" type="checkbox"/> ActiveProgramRebateTypeForRebatePrograms	joins
<input type="checkbox"/> AddRebateTypeAndPayoutPeriodToTransactionJournal	joins
<input type="checkbox"/> LookUpExistingAggregateData	joins
<input type="checkbox"/> ProgramMembersForActiveRebateTypeAndPayoutPeriods	joins
<input type="checkbox"/> ValidActivityDatedJournalsWithProgramRebateTypeProduct	joins
<input type="checkbox"/> ValidPayoutPeriodForActiveRebateTypes	joins
<input checked="" type="checkbox"/> FilterActiveRebateProgramMembers	filters
<input type="checkbox"/> FilterActiveRebateProgramPayoutPeriods	filters
<input type="checkbox"/> FilterActiveRebatePrograms	filters

When the definition runs, view the number of processed records in the Tasks tab in **Setup > Monitor Workflow Services**.

SEE ALSO:

[Salesforce Help: View the Number of Node Records Processed in a Definition Run \(can be outdated or unavailable during release preview\)](#)

New and Changed Data Processing Engine Metadata Types

Make the most of the new and changed metadata types of Data Processing Engine.

Metadata Type

Specify where you want to use the data stored in the source node

Use the new `storageType` field on the existing BatchCalcJobWritebackObject subtype on the BatchCalcJobDefinition metadata type.

Filter writeback dataset records for a user based on a condition

Use the new `filterCondition` field on the existing BatchCalcJobWritebackObject subtype on the BatchCalcJobDefinition metadata type.

Specify a folder for saving the writeback dataset

Use the new `folderName` field on the existing BatchCalcJobWritebackObject subtype on the BatchCalcJobDefinition metadata type.

Specify the name of the source object from which the row-level sharing inheritance settings are applied

Use the new `sharingInheritanceObjectName` field on the existing `BatchCalcJobWritebackObject` subtype on the `BatchCalcJobDefinition` metadata type.

Specify a collection of custom nodes

Use the new `BatchCalcJobCustomNode` subtype on the existing `BatchCalcJobDefinition` metadata type.

Decision Explainer

Decision Explainer is a collection of setup objects that provide insight into why a business rule generated a specific result.

IN THIS SECTION:[Connect REST API](#)

You can access Decision Explainer APIs using REST endpoints. These REST APIs follow similar conventions as Connect REST APIs.

Connect REST API

You can access Decision Explainer APIs using REST endpoints. These REST APIs follow similar conventions as Connect REST APIs.

IN THIS SECTION:[Changed Connect API Request Bodies](#)

These request bodies have changed.

[Changed Connect API Response Bodies](#)

These request bodies have changed.

Changed Connect API Request Bodies

These request bodies have changed.

Explainability Action Log Input

This request body has these new properties:

- `primaryFilter`—Specifies the string used as the primary filter criteria to fetch the explainability action logs.
- `secondaryFilter`—Specifies the string used as the secondary filter criteria to fetch the explainability action logs.
- `additionalFilter`—Specifies the string used as an additional filter criteria to fetch the explainability action logs.

Changed Connect API Response Bodies

These request bodies have changed.

Explainability Action Log Detail

This response body has these new properties:

- `primaryFilter`—Specifies the string used as the primary filter criteria to fetch the explainability action logs.
- `secondaryFilter`—Specifies the string used as the secondary filter criteria to fetch the explainability action logs.
- `additionalFilter`—Specifies the string used as an additional filter criteria to fetch the explainability action logs.
- `explainabilitySpecName`—Specifies the name that identifies the explainability action log record

Discovery Framework

Adopt the new enhancements to the Discovery Framework feature to give your customers an improved user experience when filling in an assessment form. Easily build and configure forms with the new QR code or Signature Discovery Framework OmniScript elements. Create forms with prefilled data from previous assessments and cut down the time needed to fill in an assessment.

IN THIS SECTION:

[Give Respondents the Option to Digitally Sign a Form](#)

Respondents can now use their digital signature to authenticate the responses on the form. Use the new Signature element in the OmniScript and create a form. When submitting the responses, respondents can choose from either of the two options to sign the form. They can type their name or initials and select a Salesforce font as their signature style or they can draw their own e-signatures. They can also add the same signature at multiple places on the form before submitting the responses.

[Submit Responses to an Assessment More Quickly](#)

Save your respondents the time and effort required to fill in responses to the same questions on multiple assessment forms. By using the new `DiscoveryFramework_Prefill` integration procedure in an OmniScript, you can access data from previously submitted responses and prefill that data on the OmniScript. You can also customize the prebuilt integration procedure to suit your business needs.

[Use QR Codes on Assessment Forms](#)

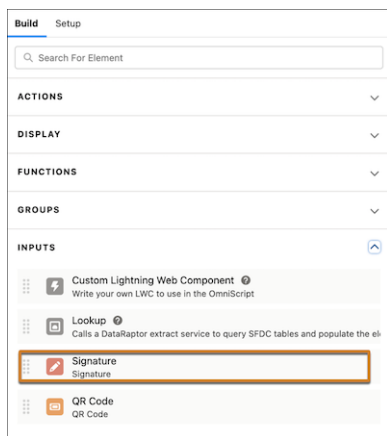
By using the new Discovery Framework QR Code element, you can easily add a QR code to a form. When submitting the responses, respondents can then scan the QR code from their mobile devices and quickly open the URL or application attached to the QR code. For example, respondents can scan the QR code to open a third-party application and upload documents for identity verification and screening.

Give Respondents the Option to Digitally Sign a Form

Respondents can now use their digital signature to authenticate the responses on the form. Use the new Signature element in the OmniScript and create a form. When submitting the responses, respondents can choose from either of the two options to sign the form. They can type their name or initials and select a Salesforce font as their signature style or they can draw their own e-signatures. They can also add the same signature at multiple places on the form before submitting the responses.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Financial Services Cloud is enabled or in Enterprise and Unlimited editions where the Health Cloud license is enabled.

How: Open an OmniScript of type Discovery Framework. To add the Signature element to the OmniScript, from the Build panel, search for Signature element. Then, from the search results, and drag the element onto the OmniStudio Designer canvas.



Next, from the canvas, click the Signature element to configure its properties.

SEE ALSO:

[Capture Respondents' Signature on the Form \(can be outdated or unavailable during release preview\)](#)

[AssessmentSignature \(can be outdated or unavailable during release preview\)](#)

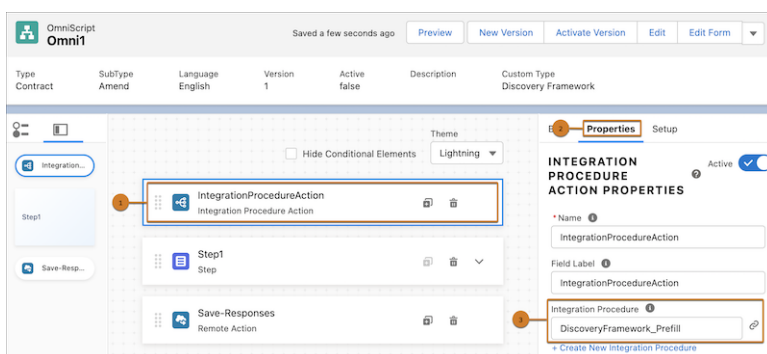
[Build the Layout of a Form \(can be outdated or unavailable during release preview\)](#)

Submit Responses to an Assessment More Quickly

Save your respondents the time and effort required to fill in responses to the same questions on multiple assessment forms. By using the new `DiscoveryFramework_Prefill` integration procedure in an OmniScript, you can access data from previously submitted responses and prefill that data on the OmniScript. You can also customize the prebuilt integration procedure to suit your business needs.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Financial Services Cloud is enabled or in Enterprise and Unlimited editions where the Health Cloud license is enabled.

How:



Open an OmniScript of type Discovery Framework. From the Build panel, drag and drop an Integration Procedure action onto the OmniStudio Designer canvas (1). Next, from the canvas, click the Integration Procedure Action. Then, from the Properties panel (2), in the **Integration Procedure** text field, enter `DiscoveryFramework_Prefill` (3).

SEE ALSO:

[Use Data From Previously Submitted Responses \(can be outdated or unavailable during release preview\)](#)

[DiscoveryFramework_Prefill Integration Procedure \(can be outdated or unavailable during release preview\)](#)

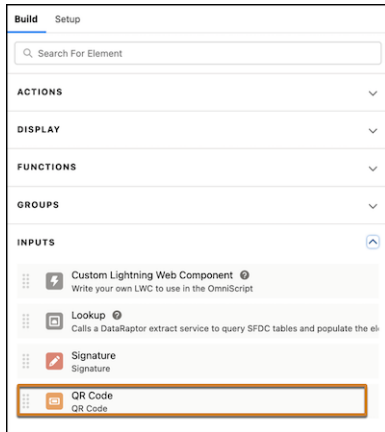
[Build the Layout of a Form \(can be outdated or unavailable during release preview\)](#)

Use QR Codes on Assessment Forms

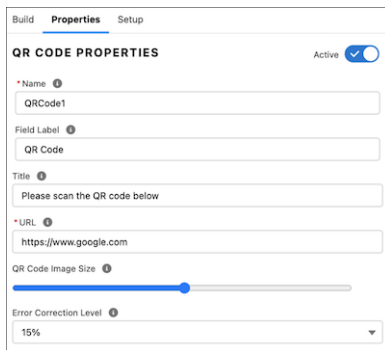
By using the new Discovery Framework QR Code element, you can easily add a QR code to a form. When submitting the responses, respondents can then scan the QR code from their mobile devices and quickly open the URL or application attached to the QR code. For example, respondents can scan the QR code to open a third-party application and upload documents for identity verification and screening.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Financial Services Cloud is enabled or in Enterprise and Unlimited editions where the Health Cloud license is enabled.

How: Open the OmniScript of type Discovery Framework. To add the QR Code element to an OmniScript, from the Build panel, search for QR Code element. Then, from the search results, drag the element onto the OmniStudio Designer canvas.



Next, from the canvas, click the QR Code element to configure its properties.



SEE ALSO:

[Use QR Codes on Assessment Forms \(can be outdated or unavailable during release preview\)](#)

[Build the Layout of a Form \(can be outdated or unavailable during release preview\)](#)

New and Changed Discovery Framework Objects and Fields

Do more with new and updated Discovery Framework objects.

View details about the respondent's signature during an assessment.

Use the new `AssessmentSignature` object.

Einstein Relationship Insights

Analyze Einstein's recommended relationships deeply and filter the types of relationships that you want to explore. Get updated when Einstein finds news and job change updates for the records that you follow. View relationship paths that show how you're connected with your prospects. Learn about the updated Einstein Relationship Insights experience. Explore relationships with person and company record objects, as active record objects are soon to be deprecated.

IN THIS SECTION:

[Streamline Relationship Recommendations by Using Relationships Filter](#)

Sales reps can focus on the relationship type that they wish to explore instead of seeing all the recommended and structured relationships. Sales reps can choose to see Einstein's recommended relationships from unstructured content like the web and news, structured relationships in Salesforce, or both.

[Get Updates for Records You Follow on Your Home Page](#)

Keep sales reps updated on the events and job changes related to the records that reps follow. Sales reps can explore these updates by using the Einstein Relationship Insights Digest component and get more context on their prospects.

[See How You're Connected with Prospects](#)

Sales reps with Einstein Activity Capture connections can now see the connection path that shows how they're connected with Einstein's recommended relationships. Reps can view the detailed connection path between them and the record that they're viewing and can identify colleagues who have had email conversations or meetings with prospects. Sales reps can use the information to learn about a contact from the colleagues or even request the colleagues to introduce the reps to the prospects.

[Enhanced Einstein Relationship Insights User Experience](#)

To improve usability, we've streamlined the Einstein Relationship Insights user experience. By default, relationships are now presented in a list view so that sales reps can quickly learn the context on the relationships and why Einstein recommended these relationships. Icons and buttons on the web pages with browser extension have also been updated for a simplified user experience.

[Active Record Model Is Now Retired](#)

Sales reps can no longer use an active record object to explore opportunities or track the connections between person and company records. The Active Record Model has been deprecated and now sales reps can use only the Simple Model to explore the relationships between person and company record objects.

[Einstein Relationship Insights Has New Objects](#)


Use the new objects to get information and insight notifications that Einstein Relationship Insights explores, such as news mentions, job updates, and relationships.

Streamline Relationship Recommendations by Using Relationships Filter

Sales reps can focus on the relationship type that they wish to explore instead of seeing all the recommended and structured relationships. Sales reps can choose to see Einstein's recommended relationships from unstructured content like the web and news, structured relationships in Salesforce, or both.

Where: This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Einstein Relationship Insights is enabled.

When: Relationship filters are available later in the Spring '23 release.

How: Go to an account or contact, and then explore the account or contact from the Einstein Relationship Insights component. Click , and select the types of relationships that you want to explore.

SEE ALSO:

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

Get Updates for Records You Follow on Your Home Page

Keep sales reps updated on the events and job changes related to the records that reps follow. Sales reps can explore these updates by using the Einstein Relationship Insights Digest component and get more context on their prospects.

Where: This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Einstein Relationship Insights is enabled.

How: Add the Einstein Relationship Insights Digest component to your home page so that your sales reps can get recommendations related to the records they follow. For example, if the rep follows a record named Adam Walkerman, Einstein shows events and job changes for the record in the Einstein Relationship Insights Digest component.

SEE ALSO:

[Salesforce Help: Add the Einstein Relationship Insights Digest Component to the Home Page \(can be outdated or unavailable during release preview\)](#)

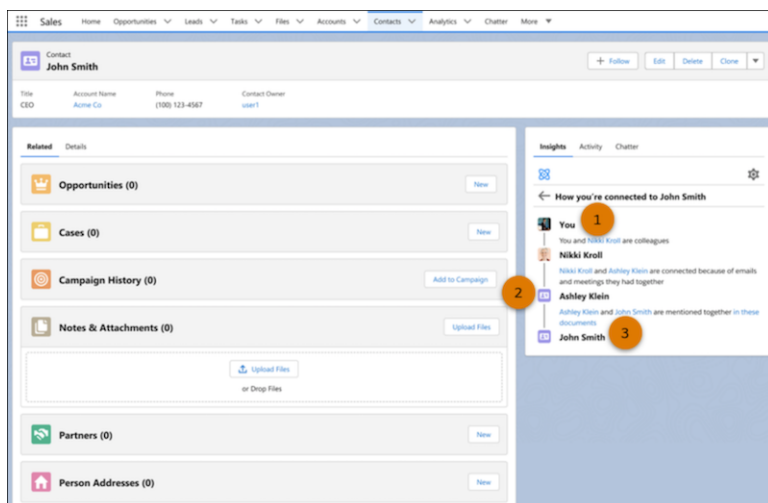
[Salesforce Help: Follow Records and Get Updates on Your Home Page \(can be outdated or unavailable during release preview\)](#)

See How You're Connected with Prospects

Sales reps with Einstein Activity Capture connections can now see the connection path that shows how they're connected with Einstein's recommended relationships. Reps can view the detailed connection path between them and the record that they're viewing and can identify colleagues who have had email conversations or meetings with prospects. Sales reps can use the information to learn about a contact from the colleagues or even request the colleagues to introduce the reps to the prospects.

Where: This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Einstein Relationship Insights and Einstein Activity Capture are enabled.

How: To capture metadata, enable Einstein Activity Capture in your Salesforce instance. Explore a contact from the Einstein Relationship Insights component. From Einstein's recommended relationships on the contact record, click **How You're Connected** to see the connection details between you, the related person, and the contact.



When the sales rep explores John Smith's contact, Einstein shows the connection between the sales rep (1), the related person (2), and the contact (3).

SEE ALSO:

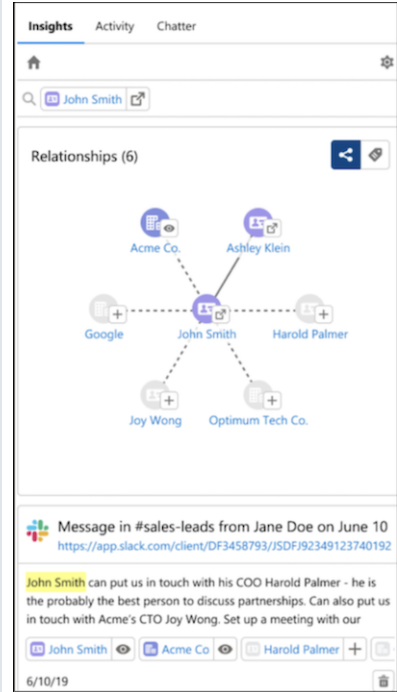
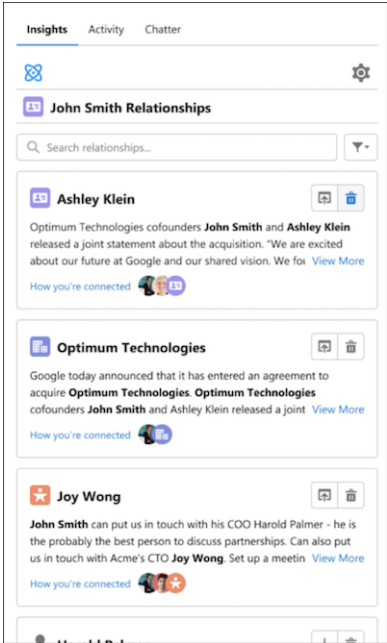
[Salesforce Help: See How Einstein Activity Capture Users Are Connected \(can be outdated or unavailable during release preview\)](#)

Enhanced Einstein Relationship Insights User Experience

To improve usability, we’ve streamlined the Einstein Relationship Insights user experience. By default, relationships are now presented in a list view so that sales reps can quickly learn the context on the relationships and why Einstein recommended these relationships. Icons and buttons on the web pages with browser extension have also been updated for a simplified user experience.

Where: This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Einstein Relationship Insights is enabled.

Why: The table shows the previous and current presentations of relationships.

Previous	Now
	

Active Record Model Is Now Retired

Sales reps can no longer use an active record object to explore opportunities or track the connections between person and company records. The Active Record Model has been deprecated and now sales reps can use only the Simple Model to explore the relationships between person and company record objects.

Where: This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Einstein Relationship Insights is enabled.

How: Starting with Spring’ 23, you can no longer see the Active Record Object section on the Einstein Relationship Insights setup page. So, reps can’t select an object model on the Einstein Relationship Insights component settings page. As a result, reps can no longer use active record objects such as opportunity or case to explore relationships.

Einstein Relationship Insights Has New Objects

Use the new objects to get information and insight notifications that Einstein Relationship Insights explores, such as news mentions, job updates, and relationships.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Einstein Relationship Insights is enabled.

Set up the insight alerts for Einstein Relationship Insights

Use the `BusinessAlert` object.

Set up the read status of an insight alert

Use the `BusinessAlertStatus` object.

SEE ALSO:

[Object Reference for the Salesforce Platform: BusinessAlert](#) (can be outdated or unavailable during release preview)

[Object Reference for the Salesforce Platform: BusinessAlertStatus](#) (can be outdated or unavailable during release preview)

Engagement

Do more with changed engagement objects.

IN THIS SECTION:

[Changed Objects](#)

Access more data with these changed objects.

Changed Objects

Access more data with these changed objects.

Connect an engagement attendee to a messaging session

Use the updated `EngagementId` field on the `EngagementAttendee` object.

Connect an engagement topic to a messaging session

Use the updated `EngagementId` field on the `EngagementTopic` object.

Save the caller's phone number to understand the context of a subsequent call without revealing the caller's identity

Use the new `PhoneNumber` field on the `EngagementInteraction` object.

Specify a `LoyaltyMemberTier`, `LoyaltyProgramMember`, `Voucher`, `TransactionJournal`, or a custom object record as a topic of engagement

Use the updated `TopicId` field on the `EngagementTopic` object.

Store your unique business data in custom fields

Configure up to 20 custom fields in each of these objects:

- `EngagementAttendee`
- `EngagementInteraction`
- `EngagementTopic`

Integration Definitions

Quickly set up integrations with different external endpoints and leverage the integration definitions across Salesforce Industries.

IN THIS SECTION:

[Quickly Set Up Integrations with External Endpoints](#)

Take advantage of a low code interface to define integrations with different external endpoints and for different use cases. Then call the integration definitions in a larger process orchestration. For example, call the integration definition from an invocable action within a flow or from an integration procedure in an OmniScript. To create the integration definitions, choose between two options: External Services Defined or Apex Defined integration definitions.

Quickly Set Up Integrations with External Endpoints

Take advantage of a low code interface to define integrations with different external endpoints and for different use cases. Then call the integration definitions in a larger process orchestration. For example, call the integration definition from an invocable action within a flow or from an integration procedure in an OmniScript. To create the integration definitions, choose between two options: External Services Defined or Apex Defined integration definitions.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Financial Services Cloud is enabled.

How: From Setup, in the Quick Find box, enter *Integration Definitions*, and then select **Integration Definitions**. To create an Integration Definition, from the top-right corner, click **New**.

SEE ALSO:

[Create an Integration Definition](#)

Intelligent Document Reader

Extract information from identity documents and experience the improved UI.

IN THIS SECTION:

[Extract Information from Identity Documents with High Accuracy](#)

Intelligent Document Reader uses AWS Textract's Analyze ID API to accurately extract information from your uploaded identity documents, such as passports and driver's licenses.

[See the Improved Language for Intelligent Document Reader](#)

For better clarity, we changed some of the Intelligent Document Reader UI terms: mapping changed to template, form type changed to document type, and form changed to document. For example, the New Mapping button is now the New Template button.

[Changed Objects in Intelligent Document Reader](#)

Create document types for identity documents and extract information from them. Identify document fields that are auto-extracted by the OCR service.

[Changed Tooling Objects in Intelligent Document Reader](#)

Identify document fields that are auto-extracted by the OCR service.

[New and Changed Intelligent Document Reader Metadata Types](#)

Make the most of the new and changed metadata types of Intelligent Document Reader.

[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.

Extract Information from Identity Documents with High Accuracy

Intelligent Document Reader uses AWS Textract's Analyze ID API to accurately extract information from your uploaded identity documents, such as passports and driver's licenses.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions of Financial Services Cloud and Health Cloud that have Intelligent Document Reader.

How: Create a document type with Identity Document as the form type, and then enable the Amazon Textract Analyze ID API in the Intelligent Document Reader Setup page:

The screenshot shows the 'Edit Global Content Extraction Settings' window. It contains three main settings: 'Maximum Pages' (a dropdown menu currently showing '4'), 'Confidence Score Threshold' (a text input field showing '10.00'), and 'Other Content Extraction APIs' (a section with a checkbox for 'Amazon Textract Analyze ID' which is checked). This last section is highlighted with an orange rectangular box. At the bottom right of the window are 'Cancel' and 'Save' buttons.

Then, create a template, select the document type created for identity documents, and upload the identity documents.

SEE ALSO:

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

[Salesforce Help: Configure Global Content Extraction Settings](#) (can be outdated or unavailable during release preview)

[Salesforce Help: Create Templates for Document Types](#) (can be outdated or unavailable during release preview)

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Changed Objects in Intelligent Document Reader

Create document types for identity documents and extract information from them. Identify document fields that are auto-extracted by the OCR service.

Specify the category of document for which you are creating the document type

Use the new `FormType` field on the existing `DocumentType` object.

Extract information from identity documents by using Amazon Textract's AnalyzeID API

Use the new supported value `AMAZON_TEXTRACT_ANALYZED_ID` in the existing `OcrService` field on the `OcrDocumentScanResult` object.

Determine whether a document field is auto-extracted by the specified OCR service

Use the new `IsAutoExtracted` field on the existing `OcrSampleDocumentField` object.

Specify the application type using the OCR sample document

Use the new `applicationType` field on the existing `OcrSampleDocumentField` object.

SEE ALSO:

[Industries Common Resources Developer Guide: Intelligent Document Reader Standard Objects](#) (can be outdated or unavailable during release preview)

Changed Tooling Objects in Intelligent Document Reader

Identify document fields that are auto-extracted by the OCR service.

Determine whether a document field is auto-extracted by the specified OCR service

Use the new `IsAutoExtracted` field on the existing `OcrSampleDocumentField` object.

SEE ALSO:

[Industries Common Resources Developer Guide: OcrSampleDocumentField](#) (can be outdated or unavailable during release preview)

New and Changed Intelligent Document Reader Metadata Types

Make the most of the new and changed metadata types of Intelligent Document Reader.

Metadata Type**Determine whether a document field is auto-extracted by the specified OCR service**

Use the new `IsAutoExtracted` field on the existing `OcrSampleDocumentField` subtype on the `OcrSampleDocument` metadata type.

Settings**Set a confidence score threshold to indicate the reliability of data in a document**

Use the new `documentReaderConfidenceOrgValue` field on the new `IndustriesEinsteinFeatureSettings` metadata type.

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.

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Get OCR Templates Response

OCR Target Object Mappings Output

This response body has this new property.

- `targetObjectRecordType`—Specifies the developer name of the record type of the target object.

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Extract information from identity documents and experience the improved UI.

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How: Create a document type with Identity Document as the form type, and then enable the Amazon Textract Analyze ID API in the Intelligent Form Reader Setup page:

Then, create a template, select the document type created for identity documents, and upload the identity documents.

SEE ALSO:

[Salesforce Help: Create Document Types and Templates](#) (can be outdated or unavailable during release preview)

[Salesforce Help: Enable Intelligent Form Reader and Configure Settings](#) (can be outdated or unavailable during release preview)

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Get OCR Templates Response

OCR Target Object Mappings Output

This response body has this new property.

- `targetObjectRecordType`—Specifies the developer name of the record type of the target object.

Industry Integration Solutions

Save the time and effort by entering the required authentication settings for connecting to an external system when enabling the integration. View the latest version details of the integration app, and update the integration app to the latest version. Update the named credentials created in the previous release to adhere to the latest format. The simplified API registration process makes it easier to enable access to the Industry API and get started with building your integrations.

The Industry APIs are available for these Industries clouds:

- Health Cloud
- Communications Cloud
- Energy and Utilities Cloud

To use the APIs, include the Industry API add-on (available at no additional cost) in your contract.

Industry integrations are available for these clouds:

- Health Cloud
- Communications Cloud
- Energy and Utilities Cloud
- Financial Services Cloud

IN THIS SECTION:

[Configure the Connection to an External System](#)

When enabling an integration app, you can now provide the authentication settings to connect to an external system. The integration app's runtime properties are updated. When you call the API, the connection between the integration app and the external system is established.

[Update the Integration App Version](#)

If a new version of an integration app is available in MuleSoft Exchange, you can update the integration app to the latest version directly in Setup.

[Automatically Register and Deregister Industry APIs](#)

Easily enable and disable access to Industry APIs with the new automated API registration and deregistration process. Previously, after enabling access to an API, you had to call the registration API to complete the process. Now, the registration process is automatically completed after you accept the terms and conditions and enable access to the API.

[Update Previous Named Credentials](#)

If you have enabled integration apps using the Winter '23 release, update your named credentials to use the Spring '23 format. The named credential is used in workflows and Apex callouts to access the app. In Winter '23, the format for the named credential was `type_assetId_version` (for example, `Communications_tmf645_impl19_V1.0.0`). The format is now `type_assetId` (for example, `Communications_tmf645_impl19`).

SEE ALSO:

[Salesforce Help: Industry Integration Solutions](#)

Configure the Connection to an External System

When enabling an integration app, you can now provide the authentication settings to connect to an external system. The integration app's runtime properties are updated. When you call the API, the connection between the integration app and the external system is established.

Where: This change applies to Lightning Experience where Industry Integration Solutions is enabled.

SEE ALSO:

[Salesforce Help: Industry Integration Solutions](#)

Update the Integration App Version

If a new version of an integration app is available in MuleSoft Exchange, you can update the integration app to the latest version directly in Setup.

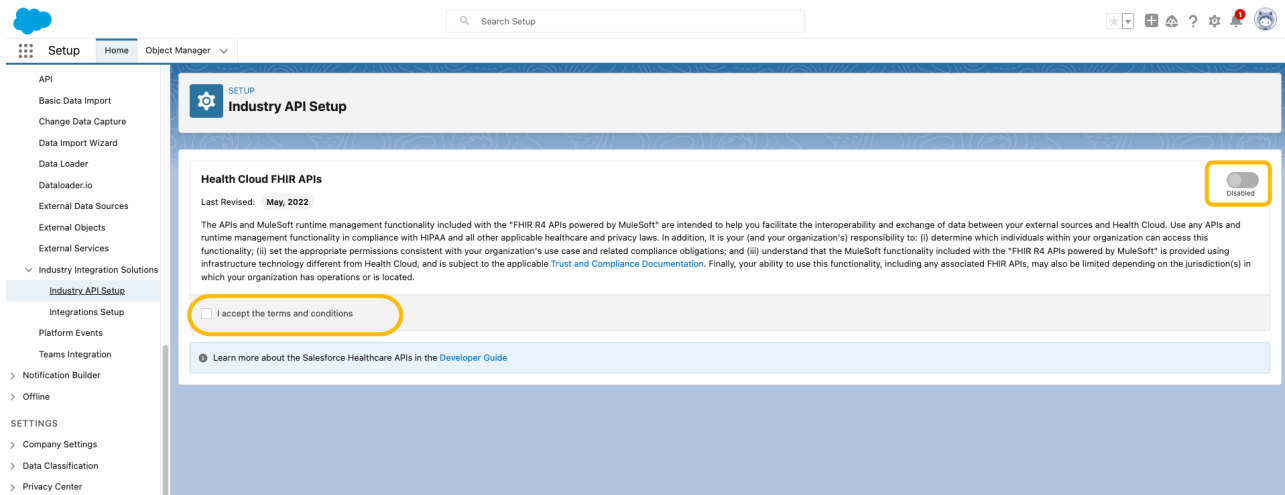
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Where: This change applies to Lightning Experience where Industry Integration Solutions is enabled.

How: When setting up an Industry API, select **I accept the terms and conditions**, and switch the toggle to Enable. To remove access to the API, switch the toggle to Disabled.



Update Previous Named Credentials

If you have enabled integration apps using the Winter '23 release, update your named credentials to use the Spring '23 format. The named credential is used in workflows and Apex callouts to access the app. In Winter '23, the format for the named credential was `type_assetId_version` (for example, `Communications_tmf645_impl19_V1.0.0`). The format is now `type_assetId` (for example, `Communications_tmf645_impl19`).

Where: This change applies to Lightning Experience where Industry Integration Solutions is enabled.

How: When you're updating or refreshing an integration app in Spring '23, the named credential is updated to the new format (`type_assetId`). Update your workflows and Apex callouts to include the new named credential.

Rebate Management

Improve rebate payout processing performance by using the new Aggregate by Member with Custom Node (Beta) Data Processing Engine definition or by adding the new custom node Compute Valid Transaction Journals Per Rebate Type (Beta) to existing definitions.



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](#).

IN THIS SECTION:

[Increase Scalability of Your DPE Definitions with Custom Node \(Beta\)](#)

Having a large number of filter conditions to evaluate valid transactions for rebate payout calculations, and aggregating the transactions can cause Data Processing Engine (DPE) definition failures. To reduce DPE definition failures, use the new Compute Valid Transaction Journals Per Rebate Type (Beta) custom node in the Aggregate by Member with Custom Node (Beta) definition. The new custom node reduces DPE definition failures by reducing the recipe size that the DPE definitions create to process transactions. You can also use the new custom node to update existing definitions used in rebate calculations to ensure that the recipes comply with the processing limit.

Increase Scalability of Your DPE Definitions with Custom Node (Beta)

Having a large number of filter conditions to evaluate valid transactions for rebate payout calculations, and aggregating the transactions can cause Data Processing Engine (DPE) definition failures. To reduce DPE definition failures, use the new Compute Valid Transaction Journals Per Rebate Type (Beta) custom node in the Aggregate by Member with Custom Node (Beta) definition. The new custom node reduces DPE definition failures by reducing the recipe size that the DPE definitions create to process transactions. You can also use the new custom node to update existing definitions used in rebate calculations to ensure that the recipes comply with the processing limit.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Rebate Management is enabled.



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

How: Clone and customize the Aggregate by Member with Custom Node (Beta) DPE template. If you are using definitions created from DPE templates other than the Aggregate by Member template, you can customize the definition to add the new node. Activate and use the definition as the calculation definition for the required Program Rebate Type records.

SETUP
Data Processing Engine

Batch Calculation Job Definition Views
All Data Processing Engine Definitions

15 items • Sorted by Package State • Filtered by All batch calculation job definition views • Updated a few seconds ago

Job Name	Process Type	Active	Template
Aggregate by Account	Rebates	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Aggregate by Member	Rebates	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Account Hierarchy Aggregate using Member	Rebates	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Aggregate by Member with Aggregate Item Details	Rebates	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Aggregate by Product and Member	Rebates	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Insert Orders To Journals with Member	Standard	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Year over Year Growth Aggregate using Member	Rebates	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Process Per Transaction using Member	Rebates	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Rebate Calculations Post Processing	Standard	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Ship And Debit Program Aggregate using Member	Rebates	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Aggregate by Member Custom 2	Rebates	<input type="checkbox"/>	<input type="checkbox"/>
Aggregate by Member Eval	Rebates	<input type="checkbox"/>	<input type="checkbox"/>
Aggregate by Member With Custom Node	Rebates	<input type="checkbox"/>	<input type="checkbox"/>
Aggregate by Member	Rebates	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Process Per Transaction using Member Custom 2	Rebates	<input type="checkbox"/>	<input type="checkbox"/>

Nodes Input Variables

[+ New Node](#)

Q Search Nodes...

- > Data Sources
- > Joins
- > Filters
- Appendix
- > Writeback Objects
- > Formulas
 - Compute New Or Updated Aggregate Records
 - Compute Transaction Journals With Activity Dates
 - Hierarchies
 - > Custom Nodes
 - Compute Valid Transaction Journals Per Rebate Type**
 - > Groups and Aggregates
 - Total Transaction Amount and Total Quantity
 - Slices
 - Forecasts

Custom : Compute Valid Transaction Jour...
Identifies valid transaction journals by applying rebate type filters.

[View Results](#) [Delete](#)

* Custom Node
industries_mfg:RebatesExpression

* Source Node
Filter Journals For Valid Products

Parameters

* Name inputColumn	* Type Input	* Input Type Source Node Field	* Input Value FilterCriteria
* Name isFilterCriteria	* Type Input	* Input Type Value	* Input Value true
* Name outputColumn	* Type Output	* Input Type Value	* Input Value isValidForFilter

This node is referenced by 1 node.

[Cancel](#) [Done](#)

SEE ALSO:

[Salesforce Help: Customize Data Processing Engine Templates with a Custom Node \(Beta\) \(can be outdated or unavailable during release preview\)](#)

Record Alerts

The Record Alerts feature allows you to store and retrieve record alerts, and set up categorization of record alerts on the objects records.

IN THIS SECTION:[Connect REST API](#)

Record Alerts REST API includes new calls.

Connect REST API

Record Alerts REST API includes new calls.

Record Alerts**Retrieve active bulk record alerts for Salesforce objects**

Make a GET request to the new `/services/data/v55.0/recordalerts/batch` resource.

Required request parameters: `whatIds`

New response body: Record Alert Collection Map

Retrieve active bulk record alerts for parent accounts

Make a GET request to the new `/services/data/v55.0/recordalerts/batch` resource.

Required request parameters: `parentIds`

New response body: Record Alert Collection Map

Dismiss or snooze bulk internal record alerts

Make a POST request to the new `/services/data/v55.0/recordalerts/ids/actions` resource.

New Request body: Record Alert Bulk Action Input

New response body: Record Alert Action Collection Map

Dismiss or snooze bulk external record alerts

Make a POST request to the new `/services/data/v55.0/recordalerts/externalIds/actions` resource.

New Request body: Record Alert Bulk Action Input

New response body: Record Alert Action Collection Map

SEE ALSO:

[Industries Common Resources Developer Guide: Record Alert APIs](#)(can be outdated or unavailable during release preview)

Service Process Studio

Boost agent productivity and customer satisfaction by creating service processes that are unique to your business. The Service Process Studio is a one-stop solution to create end-to-end service processes from intake to fulfillment.

IN THIS SECTION:[Streamline Customer Service Operations with Service Process Studio](#)

Envision a custom service process according to your business needs and build it easily and quickly by using the Service Process Studio framework. You can create a service process from scratch or use an existing service process template to customize it.

Streamline Customer Service Operations with Service Process Studio

Envision a custom service process according to your business needs and build it easily and quickly by using the Service Process Studio framework. You can create a service process from scratch or use an existing service process template to customize it.

Who: To use this feature, users need the Industry Service Excellence permission set.

Why: The Service Process Studio is a step-by-step instructional wizard that helps you design seamless customer service processes quickly and efficiently.

How: From Setup, in the Quick Find box, enter *Service Process Studio*, and then select **Service Process Studio**. Click **New Service Process**.

The process studio helps you define data attributes, associate an input request form, add business logic, associate an integration configuration to communicate with your external banking system, and link to a fulfillment process.

The screenshot displays the 'Service Process Studio' interface for configuring a process named 'Address Update'. The top navigation bar includes a back arrow, the title 'Service Process Studio', the specific process name 'Address Update', and a help icon. On the right side of the header, there are buttons for 'View Summary', 'Activate', and 'Save'. A sidebar on the left lists the configuration steps: 'Details' (selected), 'Data Attributes', 'Request Form', 'Preprocessor', 'Integration Definition', and 'Fulfillment Flow'. The main content area under 'Details' prompts the user to 'Define the basic details for your service process'. It includes input fields for 'Process Name' (filled with 'Address Update') and 'API Name' (filled with 'Address_Update'). Below these are fields for 'Short Description' and 'Long Description'. The 'Long Description' field features a rich text editor with a toolbar showing font settings (Salesforce Sans, size 12) and various formatting options like bold, italic, underline, and list creation. A 'Next' button is located at the bottom right of the configuration area.

Deploy these service processes on record pages using the Action Launcher component so that they're accessible to service agents at their fingertips.

SEE ALSO:

[Salesforce Help: Service Process Studio](#)

Marketing

Marketing Cloud is the premier platform for delighting customers with 1:1 customer journeys. It enables you to build a single view of your customer, leveraging data from any source. Plan and optimize unique customer journeys based on your business objectives. Deliver personalized content across every channel and device at precisely the right time. Measure the impact of each interaction on your business so that you can optimize your approach in real time and deliver better results.

Learn about our latest features and enhancements in [Marketing Cloud Release Notes](#).

SEE ALSO:

[Marketing Cloud Overview](#)

[Marketing Cloud: Earlier Release Notes](#)

[Salesforce Marketing Cloud Facebook Page](#)

Marketing Cloud Account Engagement

Now you have access to actionable recommendations to improve system processing in your business unit. Plus, review and correct errors that occur in your External Action integrations.



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:

[General Enhancements](#)

Use Account Engagement Optimizer to improve system processing in your business unit. The option to run automation rules in real time is being retired and sending domain validation is changing.

[APIs and Integrations](#)

Review errors for your External Action integrations so you can make adjustments. You also get new and updated fields for Version 5 of the Account Engagement API.

General Enhancements

Use Account Engagement Optimizer to improve system processing in your business unit. The option to run automation rules in real time is being retired and sending domain validation is changing.

IN THIS SECTION:

[Improve Efficiency in Your Business Unit with Account Engagement Optimizer \(Beta\)](#)

Get actionable recommendations to help you maximize efficiency and get ahead of issues in your business unit. The recommendations Optimizer gives can help you improve email send times, keep visitor tracking running smoothly, and more. You also get an overall status for your business unit so you know if something critical needs your attention. Plus, use Optimizer's table action manager to pause and prioritize actions.

[Sending Domain Validation Is Changing](#)

Sending domain validation now requires proof of ownership. For each of your sending domains, Account Engagement generates a unique validation key that you copy and paste into your DNS record. When you validate your domain, the system checks your DNS record to confirm that the TXT entry matches the validation key in your business unit. Domains that you validated previously with DKIM remain validated. However, existing domains that weren't validated previously now require the new validation method.

[The DomainKey Policy Column Is Being Removed](#)

As part of the sending domain validation change, the DomainKey Policy column is being removed from the Domain Management page. The DomainKey column is still present. While we recommend adding a DomainKey entry to your DNS records, it's not required to validate your sending domain.

[The Default for Some Account Engagement Settings Is Changing](#)

Because trust is a core value at Salesforce, new Account Engagement business units now have these settings on by default to help protect prospect privacy: First-Party Tracking, Force HTTPS, Honor Do Not Track, and Request opt-in from all visitors. The Max Tracking Cookie Duration setting now defaults to 365 days. An Account Engagement admin can change or edit the default settings at any time. These changes affect only customers who are new after Spring '23 release and don't override existing settings in your business unit.

[The Option to Run Automation Rules in Real Time Is Being Retired](#)

The option to run automation rules in real time is scheduled for retirement in all Account Engagement editions in June 2023. After the retirement, existing automation rules that use this setting continue to run but don't run in real time. When you create a new rule or edit an existing rule, the option to run in real time is no longer available.

[Monitor External Action Errors to Keep Automations Running Smoothly](#)

Review third-party app integration error root causes and pinpoint which automations, steps, and actions are affected. Identify, diagnose, and fix errors that are preventing your automations from running as expected.

[Review External Actions Usage](#)

Review all third-party app usage in one place on the Usage and Limits tab.

[How Long Inbox Preview Renders Are Stored Is Changing](#)

Renders for email inbox previews are now stored for 90 days from their creation date. Existing renders that are older than 90 days are deleted on February 9, 2023.

[Open PDF Files in Your Browser](#)


Hosted PDF files now open in a browser window instead of downloading to your computer, so that you can bookmark them. This update applies to all PDF files uploaded after January 23, 2023.

Improve Efficiency in Your Business Unit with Account Engagement Optimizer (Beta)

Get actionable recommendations to help you maximize efficiency and get ahead of issues in your business unit. The recommendations Optimizer gives can help you improve email send times, keep visitor tracking running smoothly, and more. You also get an overall status for your business unit so you know if something critical needs your attention. Plus, use Optimizer's table action manager to pause and prioritize actions.

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

How: Opt in to the beta from your business unit dashboard or by navigating to the Optimizer page in Account Engagement Settings. Review your recommendations and take action as needed. When applicable, recommendations include a direct link to the area of the app the recommendation focuses on.



PAY ATTENTION
To tune up the efficiency of your business unit, follow these recommendations.

Recommended Actions Filter:

REASON FOR ALERT	PRIORITY	FEATURE AREA	RECOMMENDATION
Inactive Engagement Studio programs	Medium	Engagement Studio	To reduce processing delays, delete or pause inactive Engagement Studio programs .

SEE ALSO:

[Salesforce Help: Maximize Efficiency with Account Engagement Optimizer \(Beta\)](#) (can be outdated or unavailable during release preview)

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Sending domain validation now requires proof of ownership. For each of your sending domains, Account Engagement generates a unique validation key that you copy and paste into your DNS record. When you validate your domain, the system checks your DNS record to confirm that the TXT entry matches the validation key in your business unit. Domains that you validated previously with DKIM remain validated. However, existing domains that weren't validated previously now require the new validation method.

Where: This change applies to all Account Engagement editions.

How: From the Domain Management page in Account Engagement, copy the validation key for your sending domain and add it to your DNS as a TXT entry. After the key is added, verify the domain in Account Engagement by checking the DNS entries.

SEE ALSO:

[Salesforce Help: Add and Verify a Sending Domain](#) (can be outdated or unavailable during release preview)

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The Default for Some Account Engagement Settings Is Changing

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Where: This change applies to all Account Engagement editions.

SEE ALSO:

[Knowledge Article: Real Time Automation Rule Setting Retirement](#)

Monitor External Action Errors to Keep Automations Running Smoothly

Review third-party app integration error root causes and pinpoint which automations, steps, and actions are affected. Identify, diagnose, and fix errors that are preventing your automations from running as expected.

Where: This change applies to the Account Engagement Lightning App in Plus, Advanced, and Premium editions.

How: Use the External Action Errors table in Account Engagement Settings to identify issues with your integrations.

External Action Errors						
EXTENSION	ACTION	AUTOMATION TYPE	AUTOMATION NAME	ERROR MESSAGE	PROSPECT	OCCURRED AT
Standard Actions	Apply Lead Assign Rule	Engagement Studio	Apply Lead Assign after-deploy	Unknown Error: We could not successfully... (show)	Tom Smith	2022-11-22 17:53:26
Standard Actions	Apply Lead Assign Rule	Engagement Studio	Apply Lead Assign pre-deploy	Client Error, could not invoke action... (show)	Marty Low	2022-08-02 00:01:27

SEE ALSO:

[Salesforce Help: Monitor External Action Errors \(can be outdated or unavailable during release preview\)](#)

Review External Actions Usage

Review all third-party app usage in one place on the Usage and Limits tab.

Where: This change applies to Account Engagement Lightning App in Plus, Advanced, and Premium editions.

How: Go to Account Engagement Settings, and select the **Usage and Limits** tab.

Account Usage and Limits My Profile			
Available Features			
Feature	Usage	Limit	Utilization
Daily API Requests ⓘ	0 daily api requests	100,000	0%
Concurrent API Requests ⓘ	0 concurrent api requests	5	0%
Daily External Activity API Limits ⓘ	0 daily external activity api limits	25,000	0%
Concurrent External Activity API Requests ⓘ	0 concurrent external activity api requests	5	0%
Rate Limit External Activity API Requests ⓘ	0 rate limit external activity api requests	200	0%
Daily External Action Calls ⓘ	0 daily external action calls	100,000	0%
Mailable Database ⓘ	3 mailable prospects	10,000	0.03%
Automation Rules ⓘ	0 automation rules	150	0%
Landing Pages ⓘ	0 landing pages	Unlimited	
Forms ⓘ	1 forms	Unlimited	
Form Handlers ⓘ	0 form handlers	Unlimited	

SEE ALSO:

[Salesforce Help: Review External Actions Usage \(can be outdated or unavailable during release preview\)](#)

How Long Inbox Preview Renders Are Stored Is Changing

Renders for email inbox previews are now stored for 90 days from their creation date. Existing renders that are older than 90 days are deleted on February 9, 2023.

Where: This change applies to all Account Engagement editions.

SEE ALSO:

[Salesforce Help: Test with Inbox Previews \(can be outdated or unavailable during release preview\)](#)

Open PDF Files in Your Browser

Hosted PDF files now open in a browser window instead of downloading to your computer, so that you can bookmark them. This update applies to all PDF files uploaded after January 23, 2023.

Where: This change applies to all Account Engagement editions.

SEE ALSO:

[Salesforce Help: Force Pardot-Hosted File Downloads to Open in a New Tab, Instead of Downloading Automatically \(can be outdated or unavailable during release preview\)](#)

APIs and Integrations

Review errors for your External Action integrations so you can make adjustments. You also get new and updated fields for Version 5 of the Account Engagement API.

IN THIS SECTION:[The ReadyTalk Connector Is Being Removed](#)

Because the ReadyTalk service was discontinued, the connector for Account Engagement was removed on November 30, 2022. Activities remain intact on the prospect record and existing automations continue to run based on historic ReadyTalk data, but they can't be updated. ReadyTalk reports are inaccessible. Because the data becomes stale, we also recommend removing automations based on ReadyTalk data.

[The Webex Connector Is Being Removed](#)

Cisco is retiring Webex events (classic) on March 31, 2023 and the Account Engagement Webex connector is being removed on April 1, 2023. After the connector is removed, activities remain intact on the prospect record. Existing automations continue to run based on historic Webex data, but they can't be updated. Webinar reports become inaccessible. We recommend backing up your reports before the connector is removed. Because the data becomes stale, we also recommend removing automations based on Webex data.

[The Account Engagement for Slack Beta Is Being Retired](#)

The beta where marketing users can send a Slack notification with a completion action is being retired on February 13, 2023. To continue to use the completion action, follow the in-app prompts to upgrade to Account Engagement for Slack.

[Account Engagement API: New and Changed Items](#)

Access more of your data with new and updated objects for the Version 5 API.

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Where: This change applies to all Account Engagement editions.

SEE ALSO:

[Knowledge Article: Account Engagement ReadyTalk Connector Retirement](#)

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SEE ALSO:

[Knowledge Article: Account Engagement Webex Connector Retirement](#)

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The beta where marketing users can send a Slack notification with a completion action is being retired on February 13, 2023. To continue to use the completion action, follow the in-app prompts to upgrade to Account Engagement for Slack.

Where: This change applies to all Account Engagement editions.

SEE ALSO:

[Salesforce Help: Marketing Cloud Account Engagement for Slack \(can be outdated or unavailable during release preview\)](#)

Account Engagement API: New and Changed Items

Access more of your data with new and updated objects for the Version 5 API.

Updated Objects in Version 5

Enhanced Exports

Expanded support for 28 objects.

Other API Changes

Bulk Actions

Initiate multi-select table actions for asynchronous bulk processing of records.

Mobile

In the Salesforce mobile app, enjoy an improved contacts experience and enable all mobile features in one place with a new Setup panel. Mobile Publisher for Experience Cloud now supports Lightning Web Runtime (LWR) sites (beta). Prime more objects for offline use with Briefcase Builder.

IN THIS SECTION:

[Salesforce Mobile App](#)

Legacy tablet experiences are now retired. Enjoy an improved contacts experience with Enhanced Contacts (beta). Learn about and enable all available mobile features in one place with the new feature panel in Setup. Automatically optimize reports for mobile devices with Enhanced Reports, now generally available. To prepare for the retirement of setting security policies with custom attributes, migrate your configurations to the Mobile Security Setup UI.

[Mobile Publisher](#)

For Mobile Publisher for Experience Cloud enhanced Lightning Web Runtime (LWR) sites, configure the navigation tab bar of your app, and assign string values for screen-responsive properties. Learn about the new App Store screenshot size in the Mobile Publisher Setup.

[Briefcase Builder](#)

Get more objects ready for offline use with higher object limits per briefcase.

Salesforce Mobile App

Legacy tablet experiences are now retired. Enjoy an improved contacts experience with Enhanced Contacts (beta). Learn about and enable all available mobile features in one place with the new feature panel in Setup. Automatically optimize reports for mobile devices with Enhanced Reports, now generally available. To prepare for the retirement of setting security policies with custom attributes, migrate your configurations to the Mobile Security Setup UI.

IN THIS SECTION:

[Everything That's New in the Salesforce Mobile App](#)

Our latest round of new and improved Salesforce mobile app features makes it easier to access Salesforce on the go.

Everything That's New in the Salesforce Mobile App

Our latest round of new and improved Salesforce mobile app features makes it easier to access Salesforce on the go.

The new Salesforce mobile app is available for all editions, except Database.com, without an additional license. Your org's Salesforce edition and licenses, as well as a user's assigned profile and permission sets, determine the Salesforce data and features that are available to each user.

Most features become available for the Salesforce mobile app the week of February 13, 2023.

Salesforce App Enhancements and Changes	Salesforce for Android	Salesforce for iOS	Set Up in the Full Site
Navigation and Actions			
Landscape Support for Phones (Beta) Is Now Available	✓	✓	✓
Productivity Features			
Do More with Enhanced Contacts (Beta)	✓	✓	✓
Reports and Dashboards			
Get Optimized Mobile Reports with Enhanced Reports (Generally Available)	✓	✓	
Business Logic and Process Automation			
Go Mobile with Assigned Orchestration Work	✓	✓	✓
Access and Security			
Plan for the Retirement of Setting Security Policies via Custom Attributes	✓	✓	✓
Plan for Salesforce Mobile App Community License Access Retirement	✓	✓	✓
Prevent Access to Salesforce Web Classic for Lightning-Only Mobile Users	✓	✓	
Setup			
Reduce Setup Complexity with a New Feature Panel	✓	✓	✓
Legacy Tablet App Experiences Are Retired	✓	✓	✓

Landscape Support for Phones (Beta) Is Now Available

Now you can opt-in to a beta feature that allows you to use your phone in landscape orientation. It isn't recommended for production use as there are numerous usability issues to address. Rotation continues to be supported on tablets.

Where: This change applies to the Salesforce mobile app for iOS and Android on tablet in all editions, except Database.com.



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

available products and features. Salesforce doesn't guarantee general availability of this feature within any particular time frame or at all, and we can discontinue it at any time. This feature is for evaluation purposes only, not for production use. It's offered as is and isn't supported, and Salesforce has no liability for any harm or damage arising out of or in connection with it. All restrictions, Salesforce reservation of rights, obligations concerning the Services, and terms for related Non-Salesforce Applications and Content apply equally to your use of this feature.

How: From Setup, in the Quick Find box, enter *Salesforce Mobile App*, and then toggle Landscape Support on Phones (Beta) to on.

SEE ALSO:

[Salesforce Help: Navigation and Actions: What's Different or Not Available in the Salesforce Mobile App \(can be outdated or unavailable during release preview\)](#)

Get Optimized Mobile Reports with Enhanced Reports (Generally Available)

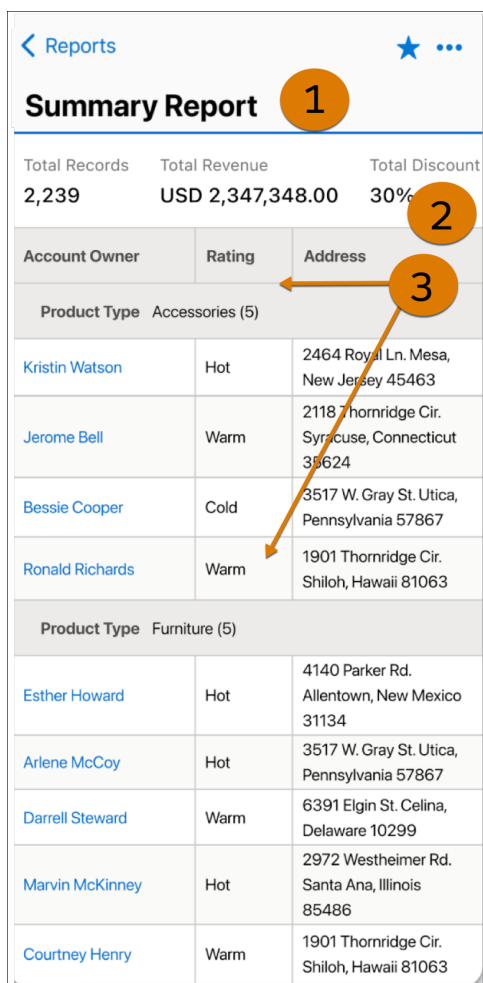
Enhanced Reports automatically optimizes reports for consumption on mobile devices without reconfiguring the report formats. In this improved mobile experience, you get a responsive user interface with mobile-friendly features such as faster load times, more consistent performance, and text wrapping 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.

When: Enhanced Reports are available the week of February 13, 2023.

How: 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).



< Reports ★ ...		
Summary Report		
Total Records	Total Revenue	Total Discount
2,239	USD 2,347,348.00	30%
Account Owner	Rating	Address
Product Type Accessories (5)		
Kristin Watson	Hot	2464 Royal Ln. Mesa, New Jersey 45463
Jerome Bell	Warm	2118 Thornridge Cir. Syracuse, Connecticut 35624
Bessie Cooper	Cold	3517 W. Gray St. Utica, Pennsylvania 57867
Ronald Richards	Warm	1901 Thornridge Cir. Shiloh, Hawaii 81063
Product Type Furniture (5)		
Esther Howard	Hot	4140 Parker Rd. Allentown, New Mexico 31134
Arlene McCoy	Hot	3517 W. Gray St. Utica, Pennsylvania 57867
Darrell Steward	Warm	6391 Elgin St. Celina, Delaware 10299
Marvin McKinney	Hot	2972 Westheimer Rd. Santa Ana, Illinois 85486
Courtney Henry	Warm	1901 Thornridge Cir. Shiloh, Hawaii 81063

SEE ALSO:

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

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

[Salesforce Help: Reports and Dashboards: What's Different or Not Available in the Salesforce Mobile App](#) (can be outdated or unavailable during release preview)

Go Mobile with Assigned Orchestration Work

Users can now complete their assigned work in the Work Guide on the Salesforce mobile app. The Flow Orchestration Work Guide component in Lightning App Builder supports both the mobile web browser and the Salesforce mobile app. The Flow Orchestration Work Guide component in Experience Builder supports only the mobile web browser.

Where: This change applies to Lightning Experience and the Salesforce mobile app for iOS and Android in Enterprise, Performance, Unlimited, and Developer editions.

SEE ALSO:

[Automate Your Business Processes: Flow Orchestration](#) (can be outdated or unavailable during release preview)

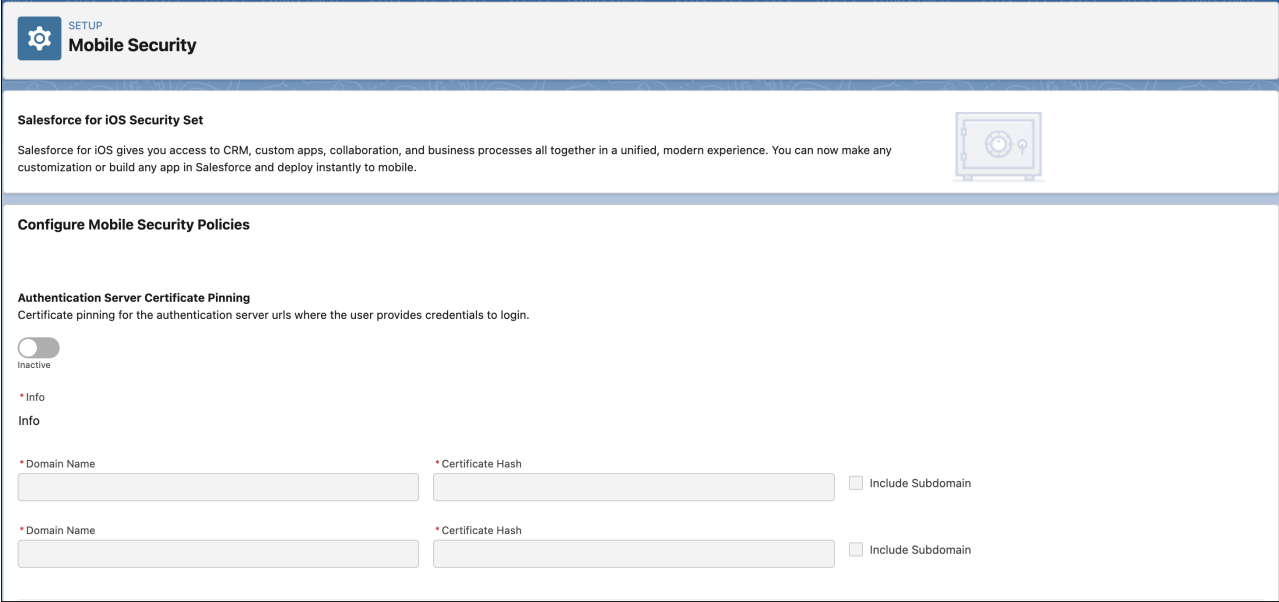
Plan for the Retirement of Setting Security Policies via Custom Attributes

In Winter '24 (October 2023), Salesforce will end support for setting and enforcing mobile app security policies via Connected App custom attributes.

Where: Enhanced Mobile App Security is available at an extra cost for the Salesforce mobile app, Mobile Publisher for Salesforce app, and Mobile Publisher for Experience Cloud app.

Why: If you have set and enforced mobile security policies through Connected App custom attributes, Salesforce strongly encourages you to migrate the configurations to the Mobile Security Setup UI as soon as possible.

How: In Setup, search for *Mobile Security* and select **Mobile Security**.



Mobile Security

Salesforce for iOS Security Set

Salesforce for iOS gives you access to CRM, custom apps, collaboration, and business processes all together in a unified, modern experience. You can now make any customization or build any app in Salesforce and deploy instantly to mobile.

Configure Mobile Security Policies

Authentication Server Certificate Pinning
Certificate pinning for the authentication server urls where the user provides credentials to login.

☐ Inactive

* Info

Info

* Domain Name * Certificate Hash ☐ Include Subdomain

* Domain Name * Certificate Hash ☐ Include Subdomain

SEE ALSO:

[Salesforce Help: Mobile Application Management \(MAM\) with Enhanced Mobile App Security](#)

[Salesforce Help: Enable and Configure Mobile App Security Policies](#)

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 Summer '23.

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

SEE ALSO:

[Knowledge Article: Salesforce Mobile App Community License Access Retirement](#)

Prevent Access to Salesforce Web Classic for Lightning-Only Mobile Users

Now when Lightning-only users try to access Salesforce in an iOS phone or Android web browser, they're redirected to a webpage that prompts them to use the Salesforce mobile app. Previously, after some users entered their credentials in their iOS phone or Android web browser, Salesforce Classic loaded in the browser instead.

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

Why: We retired access to the Salesforce mobile web experience in Summer '20. This update prevents Lightning-only users from accessing Salesforce Classic in an iOS phone or Android web browser.

SEE ALSO:

[Knowledge Article: Salesforce Mobile Web Experience Retirement](#)

[Salesforce Help: Lightning Experience-Only Editions](#)

Legacy Tablet App Experiences Are Retired

Lightning on tablet: single-column and Legacy Salesforce1 are retired as of Spring '23. The new, full-width Lightning on tablet app experience, which is performance-tuned for tablet users, is now the only tablet app experience available. The option to choose tablet experiences is no longer in Setup.

Where: This change applies to the Salesforce mobile app for iOS and Android on tablet in all editions.

SEE ALSO:

[Salesforce Help: Salesforce Mobile App Considerations for Tablets \(can be outdated or unavailable during release preview\)](#)

[Knowledge Article: Legacy Tablet App Experiences Retirement](#)

Do More with Enhanced Contacts (Beta)

Enhanced Contacts (beta) is an upgraded experience for interacting with contact lists and records, optimized for phone and tablet use. When users toggle this beta feature on, they can readily view recent contacts and lists, access caller ID for Salesforce contacts, enjoy easier contact search, use swipe actions, customize contact detail views, import and export contacts (in bulk or by themselves), and more.

Where: This change applies to the Salesforce mobile app for iOS and Android on tablet in all editions, except Database.com.

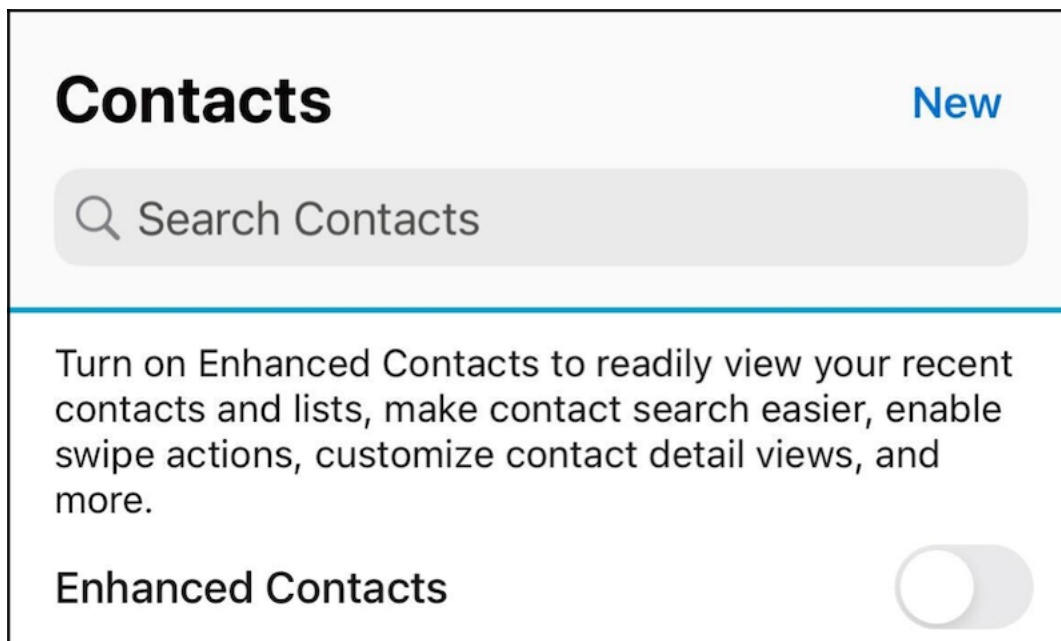


Note: As a beta feature, Enhanced Contacts is a preview and isn't part of the "Services" under your master subscription agreement with Salesforce. Use this feature at your sole discretion, and make your purchase decisions only on the basis of generally available products and features. Salesforce doesn't guarantee general availability of this feature within any particular time frame or at all, and we can discontinue it at any time. This feature is for evaluation purposes only, not for production use. It's offered as is and isn't supported, and Salesforce has no liability for any harm or damage arising out of or in connection with it. All restrictions, Salesforce reservation of rights, obligations concerning the Services, and terms for related Non-Salesforce Applications and Content apply equally to your use of this feature.

Why: Contacts is a highly trafficked area, but the current experience requires numerous taps to get a job done and is missing commonly requested capabilities. In the older contacts experience, import must be done one-by-one and there is no export capability. We've added bulk import and both single and bulk export capabilities. Newly added swipe actions have made calling and emailing more efficient.

Who: Enhanced Contacts is exclusive to the mobile app. Users of the full Salesforce site continue to use Lightning-based contacts. This beta feature is included with existing licenses.

How: From Setup, in the Quick Find box, enter *Salesforce Mobile App*, and then toggle Enhanced Contacts (Beta) to on. With the beta feature turned on, users can toggle the experience on or off from the contacts home page. Users can only use one contacts experience at a time.

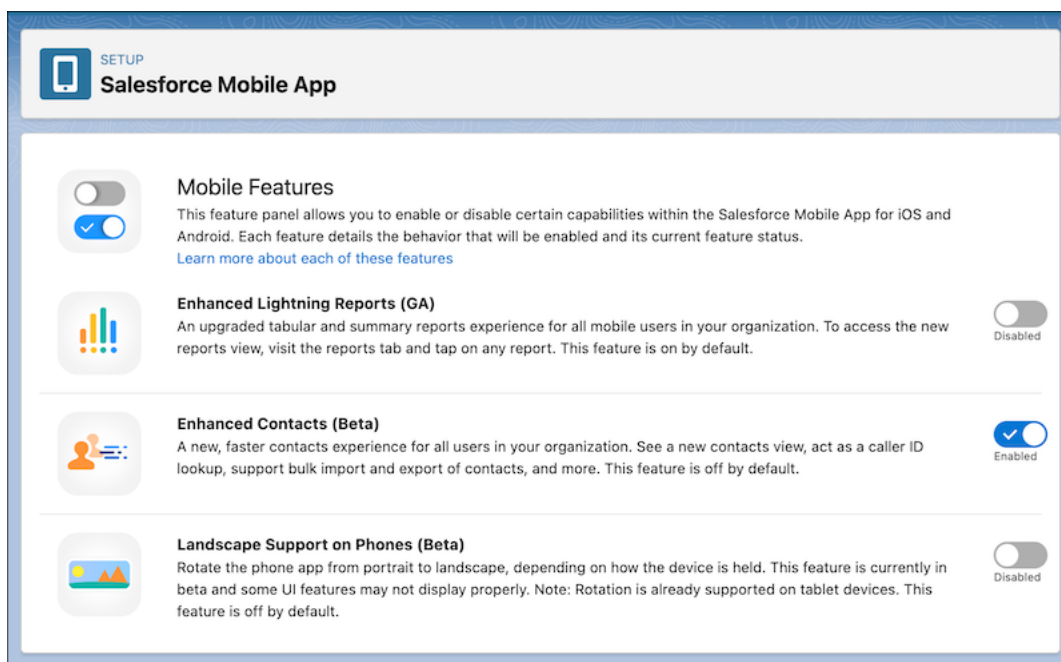


Reduce Setup Complexity with a New Feature Panel

New features are now consolidated in a panel in Setup so that you can easily learn about and enable or disable capabilities within the Salesforce Mobile App for iOS and Android. Each feature details the behavior that is enabled and its current feature status.

Where: This change applies to the Salesforce mobile app for iOS and Android on tablet in all editions, except Database.com.

How: From Setup, in the Quick Find box, enter **Salesforce Mobile App**. Use the easily accessible toggles to turn features on or off.



Mobile Publisher

For Mobile Publisher for Experience Cloud enhanced Lightning Web Runtime (LWR) sites, configure the navigation tab bar of your app, and assign string values for screen-responsive properties. Learn about the new App Store screenshot size in the Mobile Publisher Setup.

IN THIS SECTION:

[Gain Access to Mobile Device Features with User Permissions](#)

If you use native features in your app that require access to certain functions on a user's device, you can enable user permissions to gain access.

[Encourage 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.

[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.

[Configure the Navigation Tab Bar for Mobile Publisher for Experience Cloud Enhanced LWR Sites \(Beta\)](#)

For Mobile Publisher for Experience Cloud enhanced Lightning Web Runtime (LWR) sites, you can now use Experience Builder to declaratively configure the bottom navigation tab bar of a Mobile Publisher app.

[Use Unique String Property Values for Mobile Devices in Custom Lightning Web Components \(Beta\)](#)

For Mobile Publisher for Experience Cloud enhanced Lightning Web Runtime (LWR) sites, custom Lightning web components can now have different string property values for mobile and other devices. Previously, only integer property values could be screen-size responsive. With screen-size responsive properties, custom Lightning web components use the property value that best matches the end user's screen size. For example, a string property is used to set the horizontal alignment of a component. By making that property screen-size responsive, the component can now have different horizontal alignment depending on the current screen size.

[Request App Ratings and Reviews from Users](#)

Use the AppReviewService API to create a feature to prompt users to rate and submit a review of your app to the app stores (Apple and Google). An app review feature lets you ask your users for feedback on their experience using your app. Their feedback can help improve your app experience, encourage downloads, and improve your app's discoverability.

[UI Test Automation Model \(UTAM\) for Mobile Publisher Apps](#)

In Spring '23, Salesforce has created a UI Test Automation Model (UTAM) to support test automation of Mobile Publisher apps. UTAM is based on the popular Page Object model design pattern commonly used in UI tests.

[New Screenshot Size for Apple App Store Listing Is Available](#)

In Spring '23, there's a new App Store screenshot size in the Mobile Publisher Setup for 6.7 inch (170.18 mm) iPhones (Pro Max).


Gain Access to Mobile Device Features with User Permissions

If you use native features in your app that require access to certain functions on a user's device, you can enable user permissions to gain access.

Where: This change applies to all implementations of Mobile Publisher.

When: User Permissions is available in the Mobile Publisher Setup the week of February 13, 2023.

Why: In Spring '23, you can now control the user permissions and usage descriptions from within the Mobile Publisher Setup UI.

 **Important:** Depending on the feature, enabling a user permission doesn't work unless you developed and implemented the corresponding Lightning web component (LWC) into your mobile app. For example, if you enable the Contacts user permission

without having implemented the ContactsService LWC into your mobile app, your user doesn't receive a pop-up message asking for permission to access their contacts.

There are different types of supported user permissions for Android and iOS.

Android

Android User Permissions

Enable or disable any device capability permission that may apply to your app.

Explain to your users, in all supported languages, why you're requesting access to the device capabilities. When enabled, a pop-up message requests their permission when they access a feature in your app that requires their device location, microphone, camera or more. For more information, see [Enable User Device Permissions](#).

[Add/Remove Supported Language\(s\)](#)

Camera <input checked="" type="checkbox"/> Enable Camera Enabled Edit Permission Description	Location <input checked="" type="checkbox"/> Enable Location Enabled Edit Permission Description	Modify Audio Settings <input type="checkbox"/> Enable Modify Audio Settings Disabled Edit Permission Description	Record Audio <input type="checkbox"/> Enable Record Audio Disabled Edit Permission Description
Contacts <input type="checkbox"/> Enable Contacts Disabled Edit Permission Description	Calendar <input type="checkbox"/> Enable Calendar Disabled Edit Permission Description		

iOS

iOS User Permissions

Enable or disable any device capability permission that may apply to your app.

Explain to your users, in all supported languages, why you're requesting access to the device capabilities. When enabled, a pop-up message requests their permission when they access a feature in your app that requires their device location, microphone, camera or more. For more information, see [Enable User Device Permissions](#).

[Add/Remove Supported Language\(s\)](#)

Camera <input checked="" type="checkbox"/> Enable Camera Enabled Edit Permission Description	Microphone <input checked="" type="checkbox"/> Enable Microphone Enabled Edit Permission Description	Location <input checked="" type="checkbox"/> Enable Location Enabled Edit Permission Description	User Tracking <input type="checkbox"/> Enable User Tracking Disabled Edit Permission Description	Contacts <input type="checkbox"/> Enable Contacts Disabled Edit Permission Description
Calendar <input type="checkbox"/> Enable Calendar Disabled Edit Permission Description				

SEE ALSO:

[Salesforce Help: Enable User Device Permission](#)

[Salesforce Help: Develop and Implement Mobile Device Features Into Your Mobile Apps](#)

Encourage Users to Update to the Latest Mobile Publisher App Version

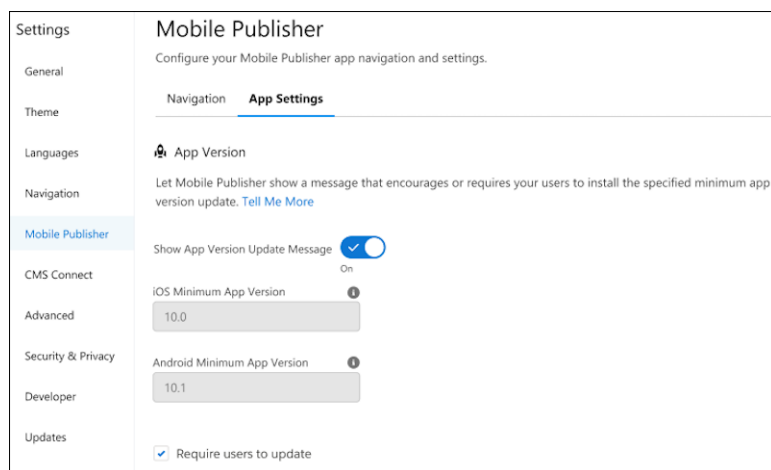
For Aura sites, you can show a message to your Mobile Publisher for Experience Cloud app users that encourages or requires them to update to the version of your app that supports enhanced domains. By updating their app, users can avoid any service disruptions.

 **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](#).

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.

The app update message is automatically enabled in the Experience Cloud builder for any app version v10.1 or earlier. It's possible to disable the app update message after your org has been updated to the Spring '23 release. For more information, see [Urge or Require Users to Update to the Latest Mobile Publisher App Version](#) in the Salesforce help.

If your version of the app is v10.1 or earlier, review the past email communications sent from the Mobile Publisher team. This email explains how to unblock our automatic updates so we can update your app to the latest version.

SEE ALSO:


[Salesforce Help: Urge or Require Users to Update to the Latest Mobile Publisher App Version](#)

[Knowledge Article: Mobile Publisher for Experience Cloud Apps and Enhanced Domains](#)

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

ABC - B2B Commerce - https://abdcemo-main-122ab1ab1b1-175-17ab1a1a123.foce.com/B2BLightning/s/

SEE ALSO:
[Lightning Web Runtime Developer Guide: Lightning Web Runtime](#)

Configure the Navigation Tab Bar for Mobile Publisher for Experience Cloud Enhanced LWR Sites (Beta)

For Mobile Publisher for Experience Cloud enhanced Lightning Web Runtime (LWR) sites, you can now use Experience Builder to declaratively configure the bottom navigation tab bar of a Mobile Publisher app.

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 configure the navigation tab bar in your mobile app, in Experience Builder go to **Settings > Mobile Publisher > Navigation**. To add selections to this navigation tab bar, click **Add Menu Item** in the Navigation panel. To disable the navigation tab bar, use the dropdown menu associated with each menu item to delete all items in the navigation bar.

Mobile Publisher

Configure your Mobile Publisher app navigation and settings.

Navigation

App Settings

Tab Bar Menu Items

Setup the navigation tab bar with up to 7 menu items. The first tab must point to the home page.

Menu Item Name	Target Page	URL
Home	Home	/

+ Add Menu Item

Edit

Delete

Tab Bar Style

Customize the style of your tab bar.

Tab Bar Background Color

Inactive Tabs Icon and Text Color

Active Tab Icon and Text Color

In the Tab Bar Style section of the Navigation panel, you can customize the background color and other styles for the navigation tab bar.

Use Unique String Property Values for Mobile Devices in Custom Lightning Web Components (Beta)

For Mobile Publisher for Experience Cloud enhanced Lightning Web Runtime (LWR) sites, custom Lightning web components can now have different string property values for mobile and other devices. Previously, only integer property values could be screen-size responsive. With screen-size responsive properties, custom Lightning web components use the property value that best matches the end user's screen size. For example, a string property is used to set the horizontal alignment of a component. By making that property screen-size responsive, the component can now have different horizontal alignment depending on the current screen size.

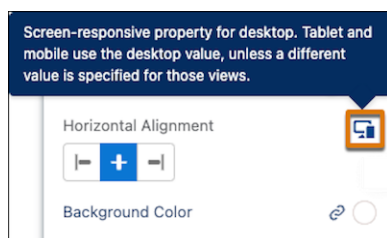
Where: This change applies to [LWR sites](#) accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.



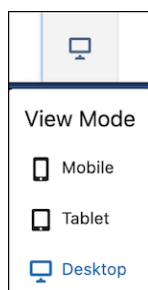
Note: This feature is a Beta Service. Customer may opt to try such Beta Service in its sole discretion. Any use of the Beta Service is subject to the applicable Beta Services Terms provided at [Agreements and Terms](#).

How: You must programmatically declare which component properties you want to be screen-size responsive.

After a property is declared screen-responsive, use Experience Builder to assign the 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.

Request App Ratings and Reviews from Users

Use the AppReviewService API to create a feature to prompt users to rate and submit a review of your app to the app stores (Apple and Google). An app review feature lets you ask your users for feedback on their experience using your app. Their feedback can help improve your app experience, encourage downloads, and improve your app's discoverability.

Where: This feature is available for Mobile Publisher for Experience Cloud apps.

 **Note:** Building app review functions using the AppReviewService API only works in the mobile app, and not on mobile or desktop web.

How: The AppReviewService Lightning web component (LWC) is built by Salesforce using the Nimbus framework. Nimbus creates a bridge between Lightning web components and a mobile device's native operating system and hardware. Nimbus plugins use the Nimbus framework, and are compiled into Salesforce (Mobile Publisher) mobile apps.

Nimbus plugins expose native features to Lightning web components through JavaScript APIs, allowing you to easily access these features in your Lightning web components.

The App Review plugin built with Nimbus can only be used when your Lightning web component runs in a supported mobile app running on a mobile device.

SEE ALSO:

[Lightning Web Components Developer Guide: Request an App Review on a Mobile Device](#)

[Lightning Web Components Developer Guide: AppReviewService API](#)

UI Test Automation Model (UTAM) for Mobile Publisher Apps

In Spring '23, Salesforce has created a UI Test Automation Model (UTAM) to support test automation of Mobile Publisher apps. UTAM is based on the popular Page Object model design pattern commonly used in UI tests.

Where: This update applies to all implementations of Mobile Publisher for Experience Cloud.

Why: Testing is paramount in getting your Mobile Publisher apps working as intended. Salesforce already uses UTAM to speed up UI testing, and we want you to have the tools available to thoroughly test your apps.

How: To understand how to use UTAM to generate page objects for native pages or components, and run a test on iOS and Android platforms, consult either the [Java](#) or the [JavaScript](#) mobile setup guide.

Examples for Java are in the [utam-java-recipes repo](#). Examples for JavaScript are in the [utam-js-recipes](#). Each repo's `README` file explains how to set up necessary tools and where to find examples of mobile tests.

After you set up the necessary tools and are ready to test, here are resources to test your Mobile Publisher apps.

- Mobile Publisher Sample Test: [utam-java-recipes](#) (github)
- UTAM Page Objects for the Publisher Playground App: [salesforce-pageobjects](#) (Native Package Manager)

SEE ALSO:

[UI Test Automation Model: Learn about UTAM for Mobile](#)

[Lightning Web Components Developer Guide: Install Mobile Extensions](#)

[Github: Mobile Publisher Sample Test](#)

[Native Package Manager \(npm\): UTAM Page Objects for the Publisher Playground App](#)

New Screenshot Size for Apple App Store Listing Is Available

In Spring '23, there's a new App Store screenshot size in the Mobile Publisher Setup for 6.7 inch (170.18 mm) iPhones (Pro Max).

Where: This change applies to all implementations of Mobile Publisher for iOS.

Why: When publishing an app in the App Store, screenshots are an important part of optimizing your App Store listing. A properly designed screenshot increases the potential to drive more downloads of your app.

How: In the App Store Screenshots section, the new screenshot size is for iPhones with 6.7 inch (170.18 mm) screens (1284 x 2778 pixels).

- iPhone 14 Pro Max
- iPhone 13 Pro Max
- iPhone 12 Pro Max

SEE ALSO:

[Salesforce Help: Prepare Your Branded Assets for iOS](#)

[Apple App Store Connect Help: Screenshot Specifications](#)

Briefcase Builder

Get more objects ready for offline use with higher object limits per briefcase.

IN THIS SECTION:

[Prime More Objects with Your Briefcase](#)

In each briefcase, you can now add up to 20 total object rules, up to 10 top-level object rules, and up to 6 levels of object rule hierarchy. These maximum values are double the previous limits per briefcase. Other briefcase limits are unchanged.

Prime More Objects with Your Briefcase

In each briefcase, you can now add up to 20 total object rules, up to 10 top-level object rules, and up to 6 levels of object rule hierarchy. These maximum values are double the previous limits per briefcase. Other briefcase limits are unchanged.

Where: This change applies to Lightning Experience desktop and in Salesforce with Field Service (SFS) enabled. Briefcase Builder supports the Salesforce Field Service mobile app for iOS and Android.

SEE ALSO:

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

Revenue

Decrease subscription quantities, sell more easily in self-service channels, and include up to 100 lines per transaction. Note a Salesforce CPQ Plus and Salesforce Billing change to asset relationships.

IN THIS SECTION:

[Subscription Management](#)

You can now decrease a subscription's quantity. Your self-service users can price, change quantities, and cancel subscriptions, and transactions can include up to 100 lines.

[Salesforce CPQ and Salesforce Billing](#)

Note a change to asset relationships in Salesforce CPQ Plus and Salesforce Billing.

Subscription Management

You can now decrease a subscription's quantity. Your self-service users can price, change quantities, and cancel subscriptions, and transactions can include up to 100 lines.

IN THIS SECTION:

[Downsell a Subscription](#)

You can now decrease the quantity of a subscription you've sold. Previously, the only change you could make to a subscription was to increase its quantity. Quantity decreases can originate in your system or via your self-service portal, and an asset's dashboard shows them along with quantity increases. If you use Subscription Management to support your billing process, you can decrease a quantity on the next billing date. Otherwise, you can amend on any date between today's date and the subscription's end date.

[Price, Change Quantities, and Cancel Subscriptions in Self-Service Channels](#)

Your self-service sales channels just got a boost. Websites built with Salesforce B2B Commerce Cloud, Salesforce Experience Cloud, and other portals can now display prices when your customers are logged in. Plus, your self-service customers can now easily change a subscription's quantity or cancel it altogether.

[Cancel a Subscription as of a Future Date](#)

Your customers can now cancel a subscription any time between today's date and the next billing date. Previously, you could cancel a subscription only on the next billing date.

[Automate Customer Refunds](#)

Maintain your customers' trust in your company by automatically processing refunds when customers cancel or decrease the quantity of their orders. Turn on the Initiate Refunds Automatically setting in Subscription Management to allow Salesforce to trigger the Automate Refund invocable action when a customer cancels or reduces an order.

[Track Field History on Quotes and Quote Line Items](#)

You can now turn on history tracking for fields on quotes and quote line items.

[See Whether Records Included in Invoice Batch Run Recovery Operations Were Processed](#)

New fields on the Invoice Batch Run details page and a new field value on the Invoice Batch Run Recovery details page show information about the outcome of an invoice batch run recovery operation.

[Get More Insight from Einstein Late Payment Risk \(Beta\)](#)

Get clarity on the late payment risk for a given invoice. Late payment risk insights now contain more relevant information for collections agents and managers.

[Void Invoices with Negative Lines \(Beta\)](#)

If a mistake is introduced during the invoicing process, you can fix it by voiding an invoice with negative invoice line amounts. If you void an invoice after negative lines have been converted to a credit memo, Subscription Management creates an offset invoice to void the credit memo and bring the credit memo balance to 0.

[Professional Edition Isn't Supported](#)

Professional Edition isn't supported in Subscription Management.

Downsell a Subscription

You can now decrease the quantity of a subscription you've sold. Previously, the only change you could make to a subscription was to increase its quantity. Quantity decreases can originate in your system or via your self-service portal, and an asset's dashboard shows them along with quantity increases. If you use Subscription Management to support your billing process, you can decrease a quantity on the next billing date. Otherwise, you can amend on any date between today's date and the subscription's end date.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions with the Sales Cloud or Service Cloud.

SEE ALSO:

[Salesforce Help: View Asset Lifecycle Details and Trends in Subscription Management \(can be outdated or unavailable during release preview\)](#)

Price, Change Quantities, and Cancel Subscriptions in Self-Service Channels

Your self-service sales channels just got a boost. Websites built with Salesforce B2B Commerce Cloud, Salesforce Experience Cloud, and other portals can now display prices when your customers are logged in. Plus, your self-service customers can now easily change a subscription's quantity or cancel it altogether.

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Automate Customer Refunds

Maintain your customers' trust in your company by automatically processing refunds when customers cancel or decrease the quantity of their orders. Turn on the Initiate Refunds Automatically setting in Subscription Management to allow Salesforce to trigger the Automate Refund invocable action when a customer cancels or reduces an order.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions with the Sales Cloud or Service Cloud.

Track Field History on Quotes and Quote Line Items

You can now turn on history tracking for fields on quotes and quote line items.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions with the Sales Cloud or Service Cloud.

SEE ALSO:

[Salesforce Help: Track Field History for Standard Objects \(can be outdated or unavailable during release preview\)](#)

See Whether Records Included in Invoice Batch Run Recovery Operations Were Processed

New fields on the Invoice Batch Run details page and a new field value on the Invoice Batch Run Recovery details page show information about the outcome of an invoice batch run recovery operation.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions with the Sales Cloud or Service Cloud.

Get More Insight from Einstein Late Payment Risk (Beta)

Get clarity on the late payment risk for a given invoice. Late payment risk insights now contain more relevant information for collections agents and managers.



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 Enterprise, Unlimited, and Developer editions with the Sales Cloud or Service Cloud.

Void Invoices with Negative Lines (Beta)

If a mistake is introduced during the invoicing process, you can fix it by voiding an invoice with negative invoice line amounts. If you void an invoice after negative lines have been converted to a credit memo, Subscription Management creates an offset invoice to void the credit memo and bring the credit memo balance to 0.



Note: Voiding of invoices with negative lines 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 Enterprise, Unlimited, and Developer editions with the Sales Cloud or Service Cloud.

Professional Edition Isn't Supported

Professional Edition isn't supported in Subscription Management.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions with the Sales Cloud or Service Cloud.

Salesforce CPQ and Salesforce Billing

Note a change to asset relationships in Salesforce CPQ Plus and Salesforce Billing.



Note: To install Salesforce Billing, you must have Salesforce CPQ. Some subscriptions offer this package for an extra cost. For pricing, contact your Salesforce account executive.

IN THIS SECTION:

[Changes to Asset Relationships Are No Longer Supported in Salesforce CPQ Plus or Salesforce Billing](#)

To help preserve data integrity, asset relationships for lifecycle-managed assets can no longer be created, updated, deleted, or cloned.

Changes to Asset Relationships Are No Longer Supported in Salesforce CPQ Plus or Salesforce Billing

To help preserve data integrity, asset relationships for lifecycle-managed assets can no longer be created, updated, deleted, or cloned.

Where: This change applies to Lightning Experience, Salesforce Classic, and the Salesforce mobile app in Salesforce CPQ Plus and Salesforce Billing.

Sales

Streamline sales management processes, automate reps' work, and close deals faster with new enhancements to core and productivity features. Revenue Intelligence users can try Account Discovery, a new feature with dashboards and Einstein Discovery models. Enablement teams can use Einstein Conversation Insights to verify if their programs are changing how reps talk to customers. Take the dynamic Activity Composer for a spin where everything is one click away. Determine compensation for reps based on their territory assignment dates. Design marker layers that get attention from more reps in Salesforce Maps.

IN THIS SECTION:

[Core Sales Features](#)

Work with a new, improved forecasts page experience, and track forecasts based on custom dates. Determine your reps' compensation when you track their territory assignment dates using Enterprise Territory Management. And break up record details in leads with Dynamic Forms.

[Productivity Features](#)

Your reps' productivity surges with the new dynamic activity composer, where everything is one button click away. Inbox users can give customers the power to select the best meeting time by including a link in their emails. Inbox users with an Outlook or Gmail integration can propose future meeting times with one click. And sales engagement boosts the use of your company's cadences. If a rep uses an email template that's also the first step in a cadence, the rep is prompted to add the email recipient to the cadence.

[Sales Engagement](#)

Let sales reps build their own processes to manage cadence targets they own, create their own outreach action templates, add targets to multiple cadences, and complete cadence tasks directly from the To Do List.

[Revenue Intelligence](#)

Try Account Discovery, a new Revenue Intelligence feature that provides dashboards and Einstein Discovery models. Account Discovery helps you see which of your accounts has potential for upside growth and which need attention. See the new forecast trending chart or Einstein Discovery models in Revenue Insights. If you have created multiple forecast types in Collaborative Forecasts, you can now switch between them in Revenue Insights.

[Pipeline Inspection](#)

See changes to your pipeline over time with a group of metrics. Edit multiple opportunity record types inline in Pipeline Inspection list views.

[Enablement for Sales Teams](#)

See how your sales teams can benefit from the exciting new features available for Enablement. Use Einstein Conversation Insights data in outcomes and milestones to verify that your programs are changing how reps talk to customers. Plus, your Enablement teams get a slew of new features to help build programs quickly, easily, and to their preferred specifications.

[Einstein Conversation Insights](#)

Einstein Conversation Insights now supports reporting on insights in voice and video calls. Sales managers can embed conversation measures into their Enablement programs. Some forms of personal information are masked from recordings.

[Integration with Microsoft®](#)

Easily discover the final steps in your migration from Lightning Sync to Einstein Activity Capture.

[Integration with Google](#)

Easily discover final steps in your migration from Lightning Sync to Einstein Activity Capture.

[Salesforce Maps Portfolio](#)

Build marker layers that resonate with more sales and service reps visually. While you build those marker layers, identify potential errors before you save your work. Get sign-off from key stakeholders so that you activate territory models quickly and with fewer delays. And spend more time designing territories and less time waiting for data-intensive alignments to load.

[Sales Cloud Einstein](#)

Estimate the value your business will see from Einstein Forecasting with the updated Readiness Assessor.

[Other Changes in the Sales Cloud](#)

Learn about other changes we've made to improve usability.

Core Sales Features

Work with a new, improved forecasts page experience, and track forecasts based on custom dates. Determine your reps' compensation when you track their territory assignment dates using Enterprise Territory Management. And break up record details in leads with Dynamic Forms.

IN THIS SECTION:

[Collaborative Forecasts](#)

Build your own forecast pages using Lightning App Builder. Track forecasts based on a custom date field. Enjoy an enhanced forecast page interface.

[Enterprise Territory Management](#)

Compensate reps based on the dates that they serve within their territories using historical assignment data. Report on that assignment data to give managers more insight for sales planning, equitable compensation, and analysis of sales performance.

[Other Changes in Core Sales Features](#)

Break up record details in leads with Dynamic Forms. Use a guided process to import contacts and leads. And coordinate a complex opportunity across your sales team using opportunity product splits.

Collaborative Forecasts

Build your own forecast pages using Lightning App Builder. Track forecasts based on a custom date field. Enjoy an enhanced forecast page interface.

IN THIS SECTION:

[Build Custom Forecasts Pages That Work for Your Business](#)

Customize desktop forecast pages to include all the information that sales leaders require to drive accurate forecasts that support your unique business. With the ease of building flexipages with the Lightning App Builder, you can build pages using standard and custom components. Your page designs can evolve as fast as your sales processes.

[Get More Flexibility for Tracking Forecasts by Custom Date](#)

To make accurate predictions for your unique business process, forecast using custom dates. For example, if your company recognizes revenue when products ship, add a custom date field to capture planned shipping dates. Then, use that field to create your forecast types. Previously, based on the forecast type, sales leaders could forecast only by Close Date, Product Date, or Schedule Date.

[Experience a Modern Forecasts Page](#)

Design updates make forecast data easier to read, features on the page simpler to navigate, and data more readily available.

[Custom Measure Forecasts Offered in Professional and Enterprise Editions](#)

Having flexibility to forecast sales based on your company's unique business model is critical to ensuring accurate forecasts. Because flexibility is so important, forecasts on custom currency and number fields are now available at no extra cost in Lightning Experience in Professional and Enterprise editions.

Build Custom Forecasts Pages That Work for Your Business

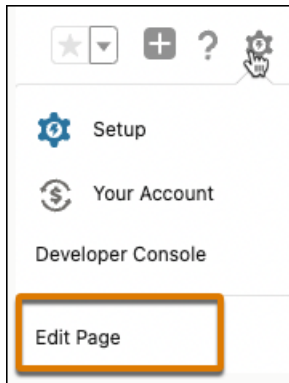
Customize desktop forecast pages to include all the information that sales leaders require to drive accurate forecasts that support your unique business. With the ease of building flexipages with the Lightning App Builder, you can build pages using standard and custom components. Your page designs can evolve as fast as your sales processes.

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

Who: Salesforce admins with access to view and build Lightning pages in the Lightning App Builder can create, edit, and activate forecasts pages.

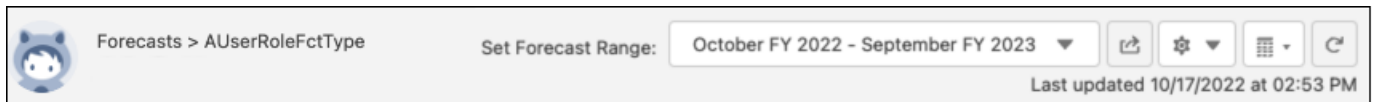
How: When Collaborative Forecasts is enabled, a default page is in place to get you started. You can design multiple forecasts pages and choose which pages to activate and assign. To view and edit a forecasts page, open the page from the Forecasts menu. Then, select

Edit Page from the Setup menu.



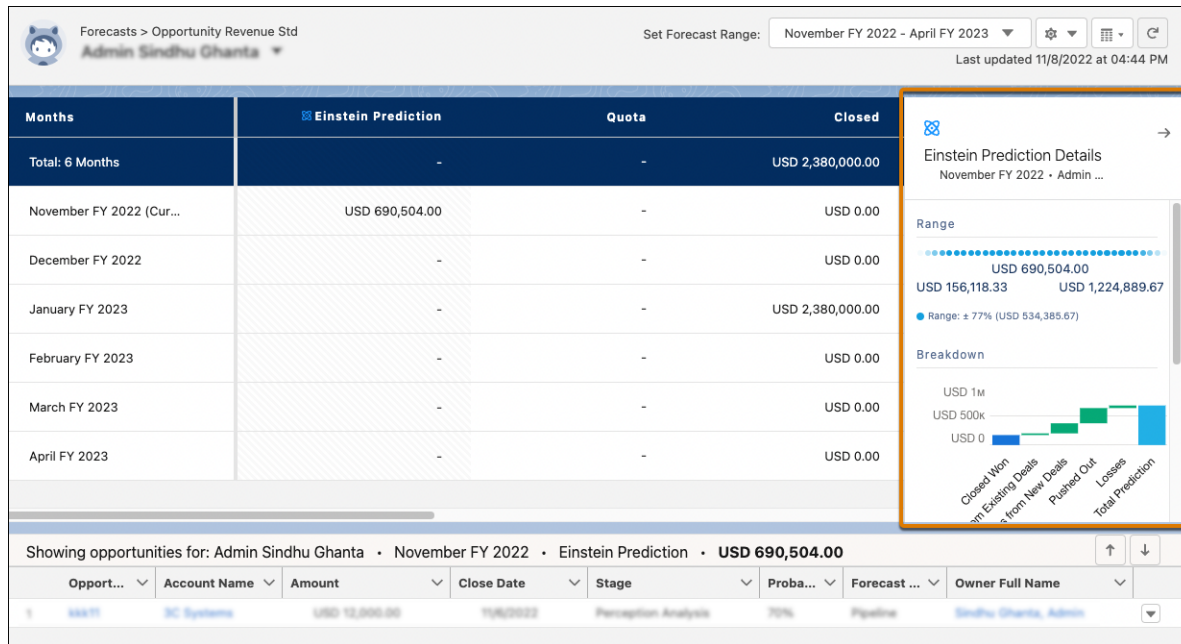
You can also create and edit forecasts pages by starting with the Lightning App Builder in Setup.

We recommend including the Forecasts Header component on each forecasts page. Viewers of the page use the header to select what data shows in other forecast-related parts of the page.

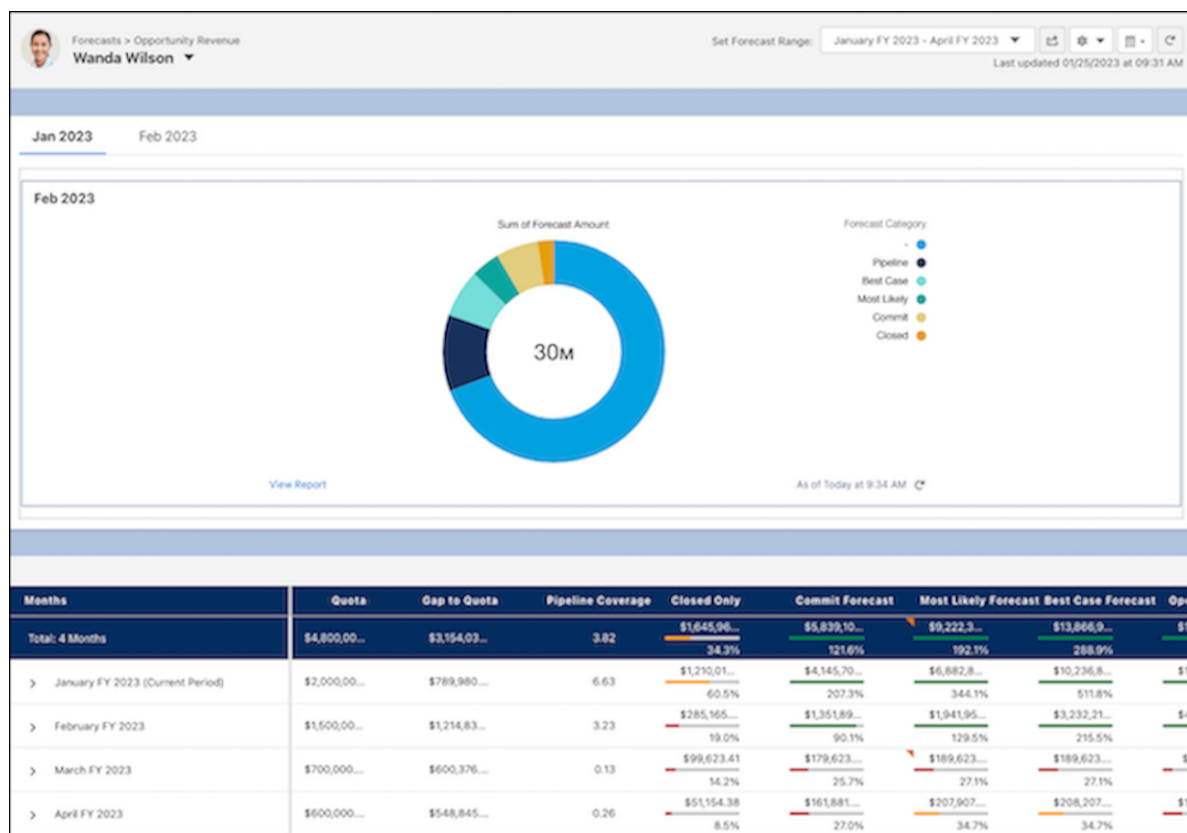


For the best experience, add the Forecast Summary component to show the actual forecast data and the Forecast Opportunity List component to show the corresponding opportunities that contribute to the forecast.

If Einstein Forecasting is enabled, when a user selects a value in the Einstein Prediction column, the prediction panel shows at the same height as the Forecasts Summary component.



Add other standard and custom components to the page to show information that your sales leaders need access to when reviewing forecast information.



SEE ALSO:

[Salesforce Help: Build Custom Forecasts Pages That Work for Your Business](#) (can be outdated or unavailable during release preview)

[Salesforce Help: Lightning App Builder](#) (can be outdated or unavailable during release preview)

Get More Flexibility for Tracking Forecasts by Custom Date

To make accurate predictions for your unique business process, forecast using custom dates. For example, if your company recognizes revenue when products ship, add a custom date field to capture planned shipping dates. Then, use that field to create your forecast types. Previously, based on the forecast type, sales leaders could forecast only by Close Date, Product Date, or Schedule Date.

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: Create and activate a custom date on the Opportunity object. Then, when you're adding a forecast type based on the Opportunity, Opportunity Product, or Opportunity Split object, your custom date is available to select as the date to use in forecast calculations.

Create a Forecast Type

Select a date type

The date type determines what date fields are used in forecast calculations.

Select a date type...

Close Date (Opportunity)

Your custom date field name

Back

Next

Forecast types using custom dates aren't supported in Einstein Forecasting.

SEE ALSO:

[Salesforce Help: Create and Manage Forecast Types in Collaborative Forecasts](#) (can be outdated or unavailable during release preview)

[Salesforce Help: Create Custom Fields](#) (can be outdated or unavailable during release preview)

Experience a Modern Forecasts Page

Design updates make forecast data easier to read, features on the page simpler to navigate, and data more readily available.

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

Why:

Forecasts > AUserRoleFctType

Set Forecast Range: October FY 2022 - March FY 2023

Last updated 11/2/2022 at 10:06 AM

Months	Quota	Closed	Commit	Most Likely	Best Case
Total: 6 Months	USD 112,000,00...	USD 58,799,65... 52.5%	USD 59,376,80... 53.0%	USD 59,945,5... 53.5%	USD 60,681,44... 54.2%
> October FY 2022	USD 200,000.00	USD 117,752.38 58.9%	USD 238,952.38 119.5%	USD 260,264.70 130.1%	USD 359,569.34 179.8%
> November FY 2022 (Current Period)	USD 550,000.00	USD 372,985.37 67.8%	USD 474,490.56 86.3%	USD 611,108.63 111.1%	USD 701,592.39 127.6%
> December FY 2022	USD 750,000.00	USD 735,500.00 98.1%	USD 735,500.00 98.1%	USD 735,500.00 98.1%	USD 735,500.00 98.1%
> January FY 2023	USD 90,000,00...	USD 51,716,10... 57.5%	USD 51,779,62... 57.5%	USD 51,819,03... 57.6%	USD 51,971,78... 57.8%
> February FY 2023	USD 500,000.00	USD 67,083.33 13.4%	USD 198,017.37 39.6%	USD 208,990.76 41.8%	USD 277,416.55 55.5%
> March FY 2023	USD 20,000,00...	USD 5,790,238... 29.0%	USD 5,950,218... 29.8%	USD 6,310,692... 31.6%	USD 6,635,580... 33.2%

Showing opportunities for: Eric Weiss - October FY 2022 - All Forecast Categories

Opportunity Name	Account Name	Amount	Close Date	Shipping...	Stage	Pro...	Forecast...	Owner Ful...
1 MayCoop	3C Systems	USD 10,000.00	10/4/2022	10/4/2022	Closed Won	100%	Closed	Weiss, Eric
2 Middle Computers LLC	Global Media	USD 21,912.80	10/2/2022	10/2/2022	10 Decision Makers	80%	Most Lk...	Weiss, Eric
3 Newport Oaks LLC	apple	USD 27,023.80	10/2/2022	10/2/2022	Closed Lost	0%	Closed	Weiss, Eric
4 Navigation Systems Te...	Global Media	USD 36,971.96	10/2/2022...	10/2/2022...	Proposal/Price Qu...	70%	Closed	Weiss, Eric

The Set Forecast Range setting is available directly on the page, saving your sales leaders clicks to see a different range (1). The forecast summary heading is blue to better highlight the column headers and to align with other features, such as Pipeline Inspection (2). The current period is indicated in the summary view (3). The opportunities list provides more details about what opportunities you're viewing (4). If you have Pipeline Inspection enabled, the button is now blue, making it easier to find when you're ready to look at your pipeline in more detail (5).

Plus, first-time forecasts page users see changes that took place in the last 7 days if historical trending is enabled. They also see quota attainment percentages if quotas are enabled. Users can still choose to hide that information in the page display settings.

Custom Measure Forecasts Offered in Professional and Enterprise Editions

Having flexibility to forecast sales based on your company's unique business model is critical to ensuring accurate forecasts. Because flexibility is so important, forecasts on custom currency and number fields are now available at no extra cost in Lightning Experience in Professional and Enterprise editions.

Where: This change applies to Lightning Experience in Professional and Enterprise editions with the Sales Cloud.

SEE ALSO:

[Salesforce Help: Custom Field Forecasts](#)

Enterprise Territory Management

Compensate reps based on the dates that they serve within their territories using historical assignment data. Report on that assignment data to give managers more insight for sales planning, equitable compensation, and analysis of sales performance.

IN THIS SECTION:

[Track Territory Assignment History](#)

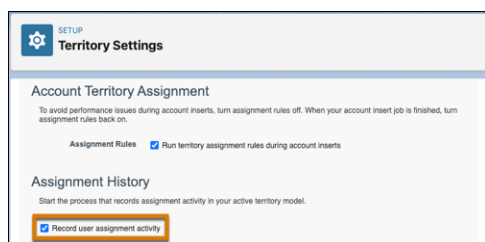
Determine compensation for reps based on their territory assignment start and end dates using Enterprise Territory Management. Reporting on those assignment dates helps you plan for sales, identify when your reps participated in deals, and analyze sales performance.

Track Territory Assignment History

Determine compensation for reps based on their territory assignment start and end dates using Enterprise Territory Management. Reporting on those assignment dates helps you plan for sales, identify when your reps participated in deals, and analyze sales performance.

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: In Territory Settings, select the option that starts the process for recording assignment activity in your active model.



Create a custom report type using the primary object Territory Models. Add object relationships for Territories and User Territory Association Logs. Using the custom report type, run a report that includes columns such as Territory Label, Full Name, Start Date, and End Date.

Custom Report Type Definition

Report Type Label: User Assignments in Territory Models
 Report Type Name: Territory_Models_with_User_History
 Report Type Category: Territory Management
 Deployment Status: Deployed
 Description: Shows active assignment dates in each territory
 Created By: Admin User, 11/21/2022, 12:59 PM
 Modified By: Admin User, 11/29/2022, 11:05 AM

Object Relationships

Territory Models (A)
 with at least one related record from Territories (B)
 with at least one related record from User Territory Association Logs (C)

Fields Available for Reports

Source: Territory Models, Territories, User Territory Association Logs

Report: User Assignments in Territory Models
User Assignment Dates for Territories

	Label	Territory Label	Full Name	Start Date	End Date
1	Global Model	Africa	Dale Henson	11/21/2022, 10:51 AM	-
2	Global Model	Africa	Hank Scurry	11/21/2022, 10:51 AM	-
3	Global Model	Asia	Alexis Martinson	11/21/2022, 10:51 AM	11/29/2022, 9:03 PM
4	Global Model	Asia	Pia Yamaguchi	11/21/2022, 10:51 AM	11/29/2022, 9:03 PM
5	Global Model	Europe	Rusty Seravat	11/21/2022, 10:51 AM	11/29/2022, 9:04 PM
6	Global Model	North America	Dale Henson	11/21/2022, 10:51 AM	-
7	Global Model	North America	Erica Acire	11/21/2022, 10:51 AM	-
8	Global Model	SouthAmerica	Naomi Ross	11/21/2022, 10:51 AM	11/29/2022, 9:05 PM
9	Global Model	SouthAmerica	Moella Ponce de León	11/21/2022, 10:51 AM	11/29/2022, 9:05 PM

Start and end dates for assigned users appear on the report.

SEE ALSO:

[Salesforce Help: Track Historical User Assignments in Territories \(can be outdated or unavailable during release preview\)](#)

Other Changes in Core Sales Features

Break up record details in leads with Dynamic Forms. Use a guided process to import contacts and leads. And coordinate a complex opportunity across your sales team using opportunity product splits.

IN THIS SECTION:

[Break Up Record Details in Leads](#)

Use Dynamic Forms to create flexible record pages for leads, without having to work in the page layout editor. Using the Lightning App Builder, add field sections and individual fields. Configure the sections and fields like other components on the page, using visibility rules to show users only what they need when they need it.

[Import Contacts and Leads with a Guided Experience](#)

Give sales reps access to a guided process to import contacts and leads using a sample CSV file and a simple data-mapping interface. The new import option provides users who have permission to import data a choice about how to import data based on the features they have permission to use. Users that need a more robust data import experience still have access to import tools they previously used.

[Collaborate on Complex Deals with Opportunity Product Splits \(Pilot\)](#)

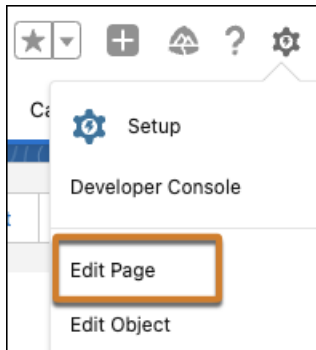
Use opportunity product splits to coordinate a complex opportunity across your sales team. See how multiple products and team members fit into a sales motion without leaving your opportunity record. You can also track how your company sells products and how different team members contributed to a won opportunity.

Break Up Record Details in Leads

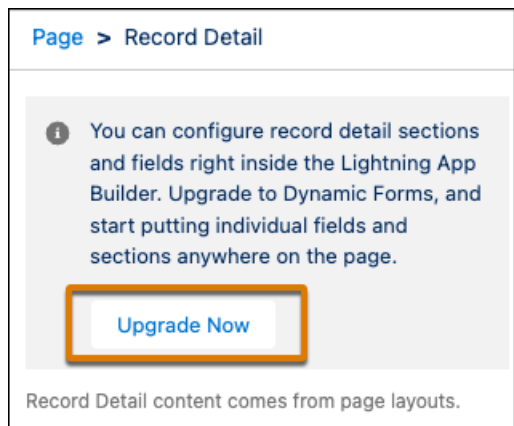
Use Dynamic Forms to create flexible record pages for leads, without having to work in the page layout editor. Using the Lightning App Builder, add field sections and individual fields. Configure the sections and fields like other components on the page, using visibility rules to show users only what they need when they need it.

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

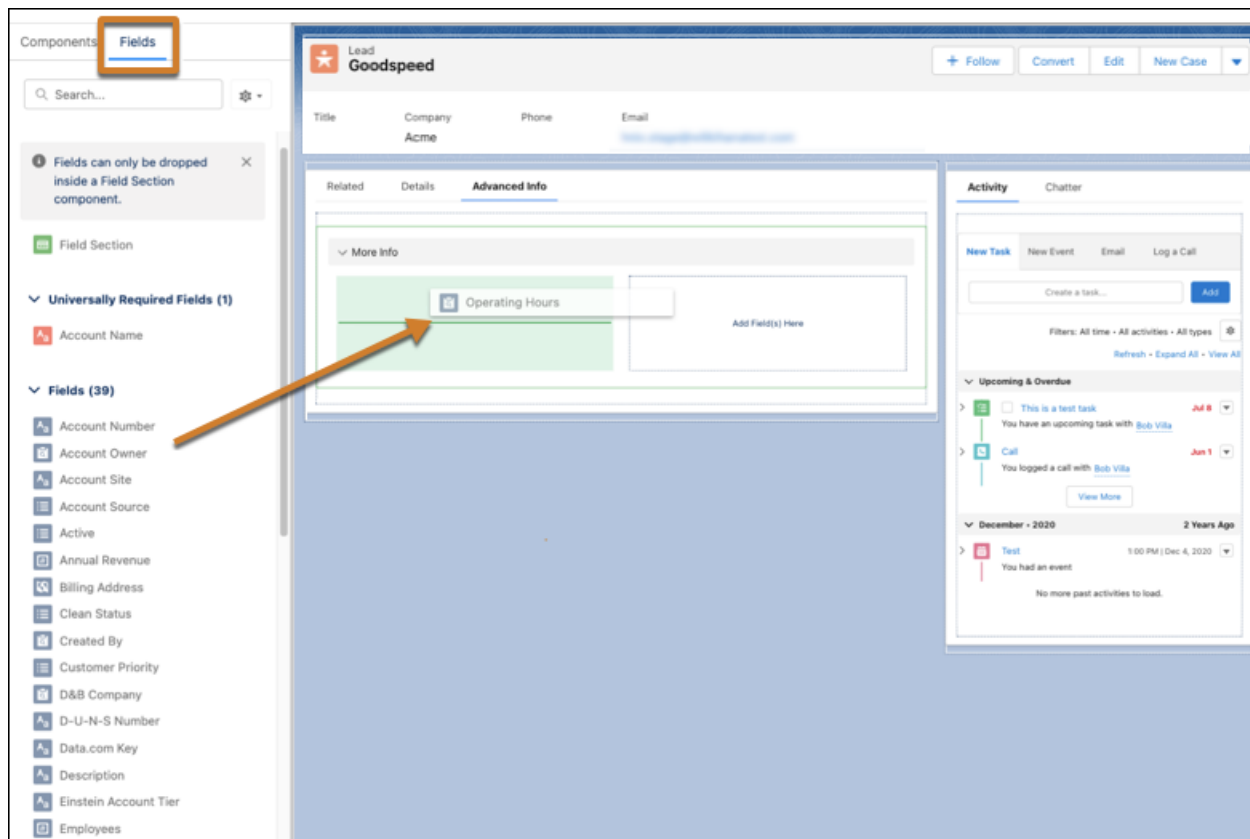
How: When you create a page using Lightning App Builder, find the Field Section option and the available fields for each object in the Fields tab. Drag sections and fields to anywhere on the page.



To migrate a layout to Dynamic Forms, open a Lightning page and select **Edit Page** from the Setup menu.



Or, access the page from the Lightning App Builder in Setup. The upgrade setup flow takes the fields and sections from the page layout and adds them to the dynamic form for the 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 \(can be outdated or unavailable during release preview\)](#)

Import Contacts and Leads with a Guided Experience

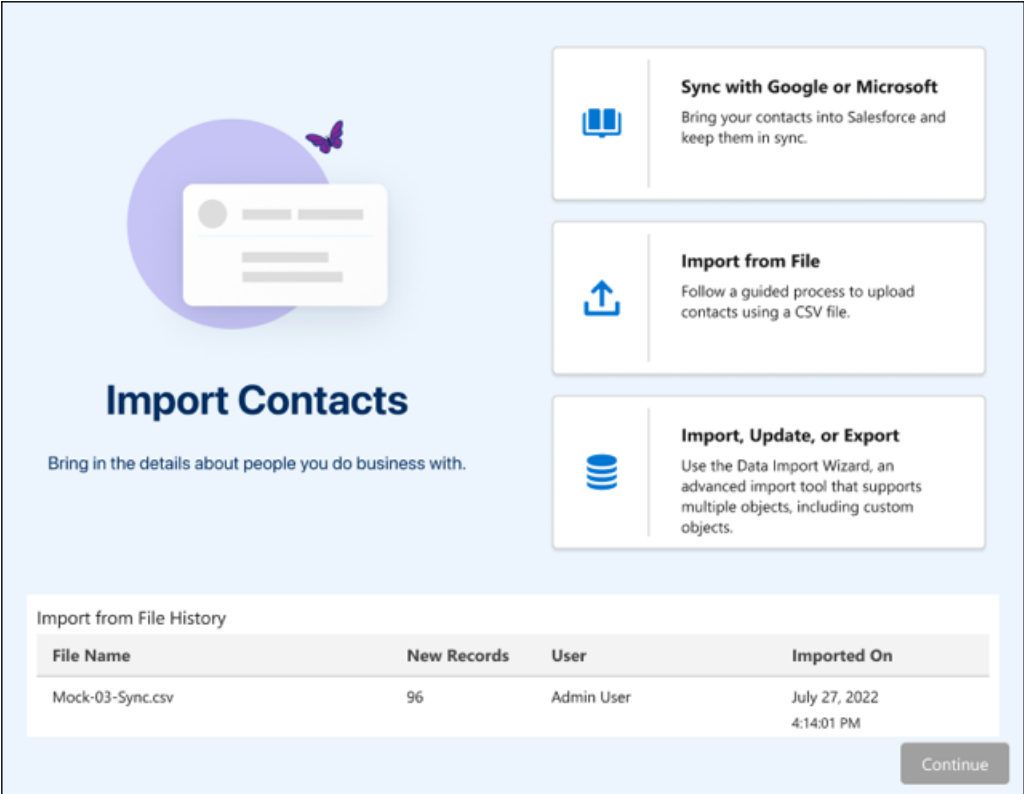
Give sales reps access to a guided process to import contacts and leads using a sample CSV file and a simple data-mapping interface. The new import option provides users who have permission to import data a choice about how to import data based on the features they have permission to use. Users that need a more robust data import experience still have access to import tools they previously used.

Where: This change applies to Lightning Experience in Professional and Enterprise editions with the Sales Cloud.

Who: When enabled, the new import experience is available to users who have import permissions for contacts or leads.

How: To get started, turn on Basic Data Import in Salesforce Setup.

When users select to import contacts or leads, they're presented with multiple options to import data, depending on their assigned permissions.



If users have access to the Data Import Wizard or are part of an Einstein Activity Capture configuration that allows contact syncing, those options are also included.


SEE ALSO:

[Salesforce Help: Contact and Lead Imports \(can be outdated or unavailable during release preview\)](#)

Collaborate on Complex Deals with Opportunity Product Splits (Pilot)

Use opportunity product splits to coordinate a complex opportunity across your sales team. See how multiple products and team members fit into a sales motion without leaving your opportunity record. You can also track how your company sells products and how different team members contributed to a won opportunity.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions. Currently, opportunity product splits are available only in a sandbox.

 **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.

To prepare for opportunity product splits, set up opportunity splits and obtain the user permissions required for opportunity splits.

SEE ALSO:

[Salesforce Help: Set Up Opportunity Splits \(can be outdated or unavailable during release preview\)](#)

Productivity Features

Your reps' productivity surges with the new dynamic activity composer, where everything is one button click away. Inbox users can give customers the power to select the best meeting time by including a link in their emails. Inbox users with an Outlook or Gmail integration can propose future meeting times with one click. And sales engagement boosts the use of your company's cadences. If a rep uses an email template that's also the first step in a cadence, the rep is prompted to add the email recipient to the cadence.

IN THIS SECTION:

[Einstein Activity Capture](#)

Improve how your reps work with events and gain more insights from events on the activity timeline.

[Activities](#)

The dynamic activity composer gives quick access to key activities and more choices than the tabbed activity composer. Users can monitor changes to events and tasks with field history tracking.

[Email Templates](#)

Your company can reuse existing cadences designed to guide reps through the selling cycle. When a rep uses an email template that's a cadence's first step, a prompt asks if they want to add the email recipient to the cadence.

[Email Experience](#)

Users can send email recipients a calendar link so that the recipient can choose a meeting time themselves. Hourly limits for single emails sent now apply to all Salesforce customers. Stay secure when users with older email addresses verify them before they can send email through Salesforce.

[Salesforce Inbox](#)

Salesforce Inbox integrates email and calendars with Salesforce so your sales reps can manage their sales more efficiently. Inbox increases reps' productivity on every email message, whether they're on the go or at their desk.

[Sales Dialer](#)

Protect your teams' calls from being marked as spam by verifying your company's information.

Einstein Activity Capture

Improve how your reps work with events and gain more insights from events on the activity timeline.

IN THIS SECTION:[Gain More Insights from Events on the Activity Timeline](#)

Simplify your reps' experience by ensuring that events on the activity timeline are available in standard reports and other Salesforce platform capabilities. If you start using Einstein Activity Capture in Spring '23 or later, your reps' events appear on the activity timeline only if the events are Salesforce records. Also, if you had the Only Show Events That Are Salesforce Records setting enabled, you no longer see that setting.

SEE ALSO:[Einstein Release Notes](#)

Gain More Insights from Events on the Activity Timeline

Simplify your reps' experience by ensuring that events on the activity timeline are available in standard reports and other Salesforce platform capabilities. If you start using Einstein Activity Capture in Spring '23 or later, your reps' events appear on the activity timeline only if the events are Salesforce records. Also, if you had the Only Show Events That Are Salesforce Records setting enabled, you no longer see that setting.

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

How: For the best experience, make sure that your reps' events appear on the activity timeline only if the events are Salesforce records. Turn on the Only Show Events That Are Salesforce Records setting on the Einstein Activity Capture settings page.

After you turn on the Only Show Events That Are Salesforce Records setting, you can't turn it off.

SEE ALSO:[Salesforce Help: What Does Einstein Activity Capture Do? \(can be outdated or unavailable during release preview\)](#)[Salesforce Help: Guidelines for Using Events with Einstein Activity Capture \(can be outdated or unavailable during release preview\)](#)

Activities

The dynamic activity composer gives quick access to key activities and more choices than the tabbed activity composer. Users can monitor changes to events and tasks with field history tracking.

IN THIS SECTION:[Take Action More Quickly in the Dynamic Activity Composer](#)

The dynamic activity composer gives reps activities at the click of a button and offers more choices than the tabbed activity composer.

[Get the Play-by-Play with Field History Tracking for Activities](#)

See a list of changes to events and tasks when you turn on field history tracking. Track up to six fields so that sales reps can see what's changed in the Related tab for events and tasks.

Take Action More Quickly in the Dynamic Activity Composer

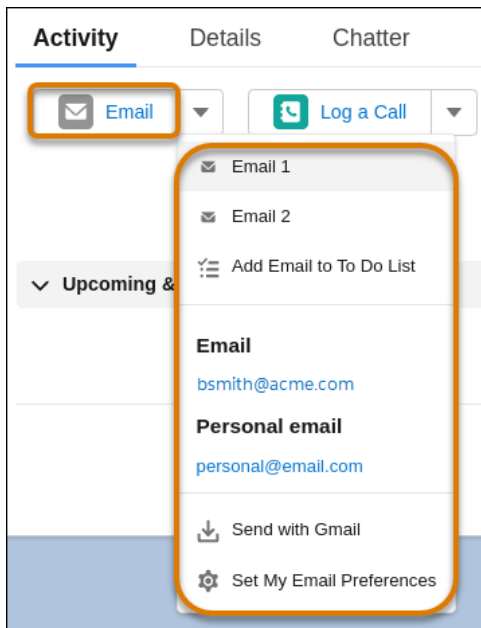
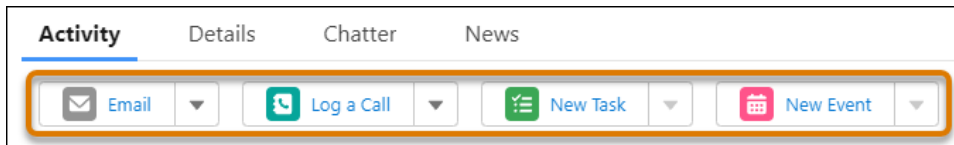
The dynamic activity composer gives reps activities at the click of a button and offers more choices than the tabbed activity composer.

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


How: Users click the buttons to perform the action, or they can click the dropdown menus for more actions.

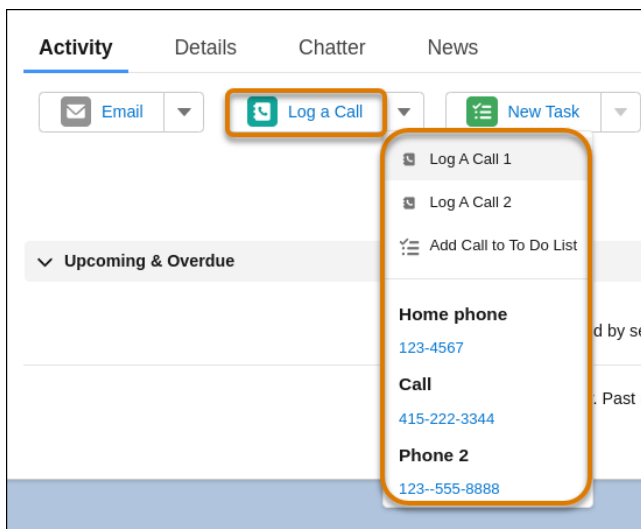


Note: The dynamic activity composer doesn't work in the Case object.




The dropdown menus offer new features. In the Email dropdown, if a user has more than one email address, they can choose from up to three addresses to send the email. Users can also get to their email preferences quickly. And users can easily add email to their to do list.

 **Note:** Reps can still set email preferences from their personal settings by going to My Email Settings in Setup.



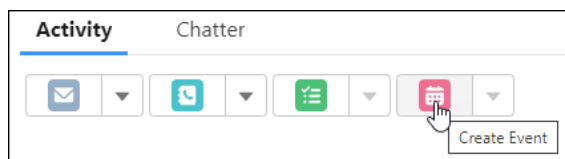
In the Log a Call dropdown, users can choose from multiple phone numbers.

As with the tabbed activity composer, admins can add custom actions to customize the menu. For email, custom actions, such as Email 1 and Email 2, are of type Email. For Log a Call, custom actions such as Log A Call 1 and Log A Call 2 are of type Log a Call.

 **Note:** Name your actions intentionally. The button name is from the name of the first action that's on the layout.

New Task and New Event don't have actions defined already. You can add custom actions.

The activity composer buttons change depending on the display area. If the button doesn't display a label, hover over it to see its purpose.



 **Note:** Macros don't work with the dynamic activity composer. To use macros, revert to the tabbed activity composer.

SEE ALSO:

[Salesforce Help: Switch Between the Tabbed and Dynamic Activity Composer \(can be outdated or unavailable during release preview\)](#)

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

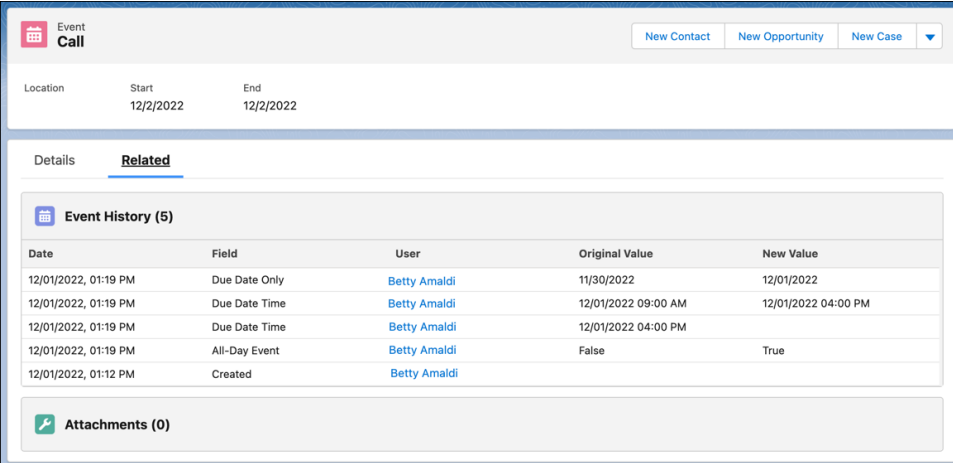
Get the Play-by-Play with Field History Tracking for Activities

See a list of changes to events and tasks when you turn on field history tracking. Track up to six fields so that sales reps can see what's changed in the Related tab for events and tasks.

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

How: Pick which fields to track in the Object Manager. From Setup, go to the Object Manager and select the **Event** or **Task** object. Select **Fields & Relationships**, then click **Set History Tracking**.

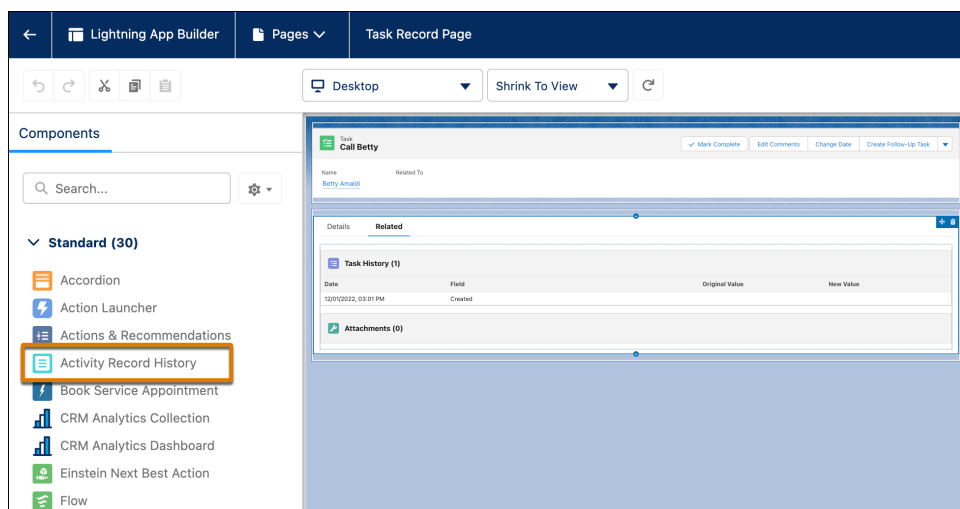
Find the Activity History list in the Related tab on default event and task pages. The list stays empty until you set up field history tracking in the Object Manager.



The screenshot shows the 'Event' record page in Salesforce. The 'Related' tab is selected, displaying the 'Event History (5)' table. The table lists changes to the event's fields, including the due date, due date time, all-day event status, and the creation of the event.

Date	Field	User	Original Value	New Value
12/01/2022, 01:19 PM	Due Date Only	Betty Amaldi	11/30/2022	12/01/2022
12/01/2022, 01:19 PM	Due Date Time	Betty Amaldi	12/01/2022 09:00 AM	12/01/2022 04:00 PM
12/01/2022, 01:19 PM	Due Date Time	Betty Amaldi	12/01/2022 04:00 PM	
12/01/2022, 01:19 PM	All-Day Event	Betty Amaldi	False	True
12/01/2022, 01:12 PM	Created	Betty Amaldi		

Or add the Activity Record History component to your custom event and task lightning pages.



SEE ALSO:

[IdeaExchange: History Tracking for Tasks](#)

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

Email Templates

Your company can reuse existing cadences designed to guide reps through the selling cycle. When a rep uses an email template that's a cadence's first step, a prompt asks if they want to add the email recipient to the cadence.

IN THIS SECTION:

[Let Email Templates Suggest a Cadence for a Recipient](#)

When your reps select an email template while writing an email, we check to see if a cadence uses that email template for its first step as a manual email. Reps are then prompted to add the primary email recipient to the matching cadence or to choose among other matching cadences. Your company can reuse existing cadences designed to guide reps through the prospecting and opportunity nurturing processes.

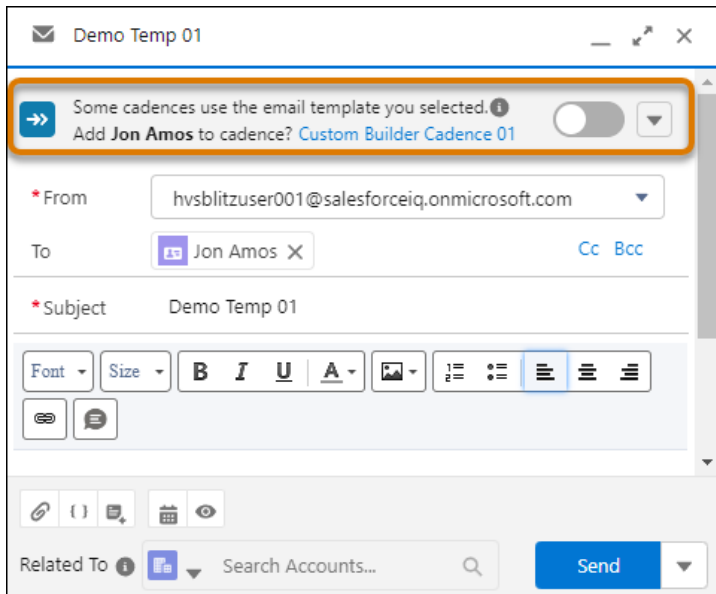
Let Email Templates Suggest a Cadence for a Recipient

When your reps select an email template while writing an email, we check to see if a cadence uses that email template for its first step as a manual email. Reps are then prompted to add the primary email recipient to the matching cadence or to choose among other matching cadences. Your company can reuse existing cadences designed to guide reps through the prospecting and opportunity nurturing processes.

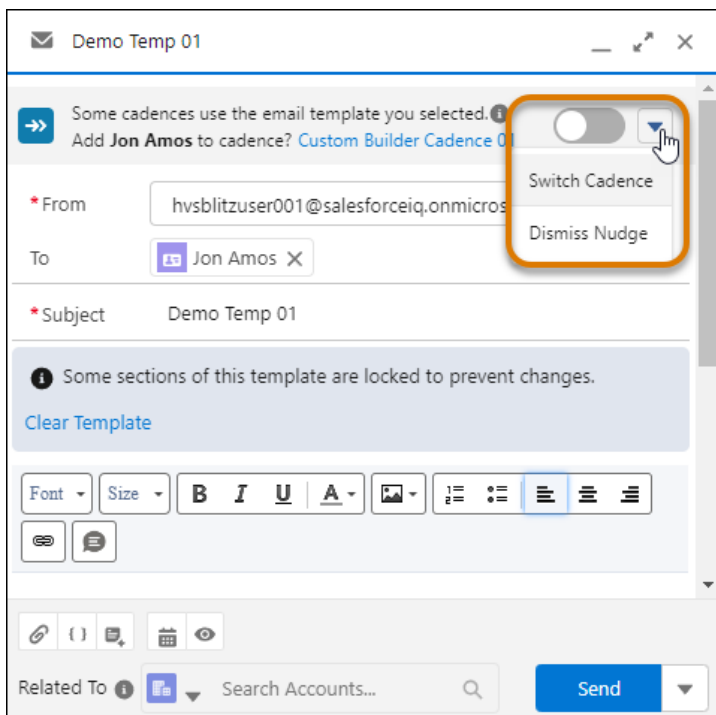
Where: This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions with Sales Cloud.

Who: This feature is available to users with access to Sales Engagement.

How: The rep inserts an email template.



If a cadence starts with a manual email step using the same template, the rep sees a prompt asking if they want to add the recipient to the cadence.



The rep enables the toggle or selects **Switch Cadence** to see which other cadences match the criteria. After the email is sent, the recipient is added to the chosen cadence and moved to the second step of the cadence.

Email Experience

Users can send email recipients a calendar link so that the recipient can choose a meeting time themselves. Hourly limits for single emails sent now apply to all Salesforce customers. Stay secure when users with older email addresses verify them before they can send email through Salesforce.

IN THIS SECTION:

[Verify Your Email Address to Send Email Through Salesforce](#)

Salesforce now requires that you use a verified email address to continue sending emails through Salesforce, such as sends to contacts or leads. Most users verify their email address as part of the sign-up process. However, some users continue to use email addresses that were created and verified before the current verification process was established. If you send an email from an email address created before the current verification process, Salesforce rejects this email message and doesn't complete the send. Unverified email addresses can't be used for sends until the user resets the password or verifies the email address.

[Verify Ownership of Your Salesforce Domain for Email Verification](#)

If you use SSO, a new verification method lets you better manage the delivery of Salesforce email by ensuring that email sends pass email verification. When a user sends an email from Salesforce, Salesforce checks the status of the user's email address to determine whether it was verified. You can bypass this status check if you prove that you own the email sending domain. Salesforce verifies ownership of sending domains using DKIM keys. When you enable this verification method, users continue to receive email verification emails. Users aren't required to complete verification steps to send emails through Salesforce. However, for enhanced security, we recommend verifying the email by clicking the link received via email.

[Prepare for 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.

[Let Customers Pick Their Own Meeting Times in Lightning Experience](#)

When emailing customers, reps can now avoid the back-and-forth and include a link to their Outlook or Gmail calendar so that the customer can choose their own meeting time.

[Define Email Preferences in the Activity Composer](#)

Your reps now have a more convenient place to set their email preferences. Previously, reps set their email preferences from their profile settings.

Verify Your Email Address to Send Email Through Salesforce

Salesforce now requires that you use a verified email address to continue sending emails through Salesforce, such as sends to contacts or leads. Most users verify their email address as part of the sign-up process. However, some users continue to use email addresses that were created and verified before the current verification process was established. If you send an email from an email address created before the current verification process, Salesforce rejects this email message and doesn't complete the send. Unverified email addresses can't be used for sends until the user resets the password or verifies the email address.

Where: This change applies to Lightning Experience and Salesforce Classic in all editions. This change doesn't apply to paid orgs with SSO.

How: To verify your email account, reset your password.

Verify Ownership of Your Salesforce Domain for Email Verification

If you use SSO, a new verification method lets you better manage the delivery of Salesforce email by ensuring that email sends pass email verification. When a user sends an email from Salesforce, Salesforce checks the status of the user's email address to determine whether it was verified. You can bypass this status check if you prove that you own the email sending domain. Salesforce verifies ownership of sending domains using DKIM keys. When you enable this verification method, users continue to receive email verification emails. Users aren't required to complete verification steps to send emails through Salesforce. However, for enhanced security, we recommend verifying the email by clicking the link received via email.

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

How: An active DKIM key indicates that you own the specified domain. Otherwise, ownership can't be proven and this setting doesn't function. To enable this verification method, go to Deliverability in Setup and select **Verify the ownership of email sending domains by DKIM keys**.

Prepare for 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 all orgs as of Spring '23.

SEE ALSO:

[Salesforce Help: Email Allocations per Edition \(can be outdated or unavailable during release preview\)](#)

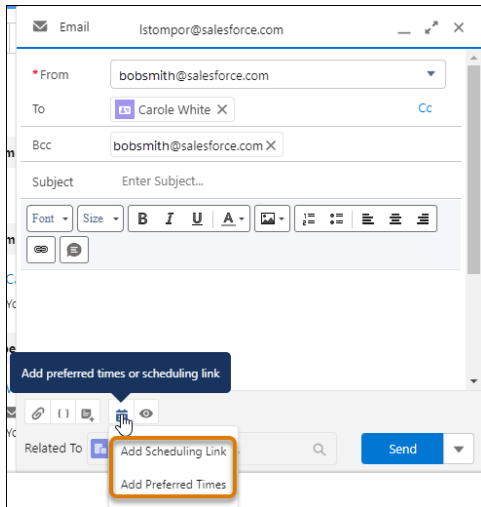
Let Customers Pick Their Own Meeting Times in Lightning Experience

When emailing customers, reps can now avoid the back-and-forth and include a link to their Outlook or Gmail calendar so that the customer can choose their own meeting time.

Where: This change applies to Lightning Experience in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions with Salesforce Inbox and Enhanced Email.

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: When creating an email, reps click the scheduling icon and select **Add Scheduling Link**.



The recipient receives the email, 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:

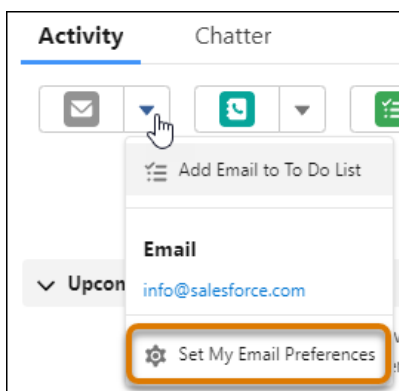
[Let Your Customers Pick Their Own Meeting Times](#)

Define Email Preferences in the Activity Composer

Your reps now have a more convenient place to set their email preferences. Previously, reps set their email preferences from their profile settings.

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

How: From the Email dropdown in the activity composer, select **Set My Email Preferences**.



Reps can still set email preferences by going to My Email Settings in Setup.

Salesforce Inbox

Salesforce Inbox integrates email and calendars with Salesforce so your sales reps can manage their sales more efficiently. Inbox increases reps' productivity on every email message, whether they're on the go or at their desk.

IN THIS SECTION:

[Salesforce Inbox Mobile](#)

Learn about the latest features and enhancements to Inbox mobile in Salesforce Help.

[Let Your Customers Pick Their Own Meeting Times](#)

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.

[Propose Future Meeting Times Easily in Outlook and Gmail Integrations](#)

When reps send an email to a customer, they can quickly add three upcoming meeting times as a suggestion. We insert the first available meeting for each of the next three business days, excluding the current business day.

[Remind Users Automatically to Install the Outlook and Gmail Extension](#)

Now there's no excuse for your users to forget to install their Outlook or Gmail extension. With the extension, they can take advantage of the Outlook and Gmail integrations you've set up.

Salesforce Inbox Mobile

Learn about the latest features and enhancements to Inbox mobile in Salesforce Help.

- [Inbox Mobile for iOS](#)
- [Inbox Mobile for Android](#)

To learn about the latest features and enhancements in Inbox desktop, see the Outlook Integration, Gmail Integration, and Email Experience sections of the Salesforce release notes.

SEE ALSO:

[Email Experience](#)

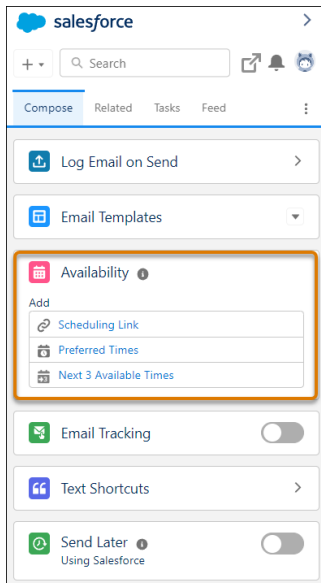
Let Your Customers Pick Their Own Meeting Times

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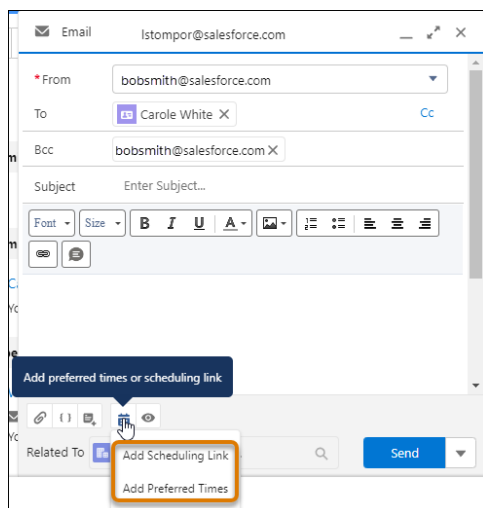
Where: This change applies to Lightning Experience in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions with Salesforce Inbox and Enhanced Email.

Who: Users with the Use Inbox user permission, available with a High Velocity Sales, Sales Cloud Einstein, or Inbox license, can use this feature.

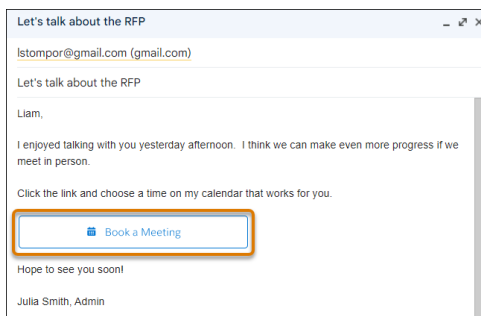
How: Start composing an email in the Outlook or Gmail integration. In the Salesforce pane, click **Scheduling Link** to insert a link in an email.



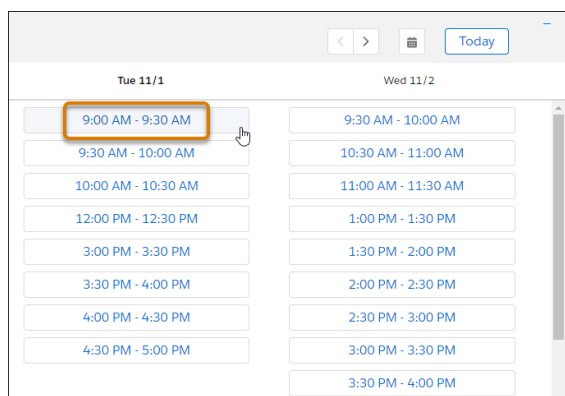
In Lightning Experience, click the scheduling icon and select **Add Scheduling Link**.



The recipient receives the email and clicks **Book a Meeting**. Then 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.

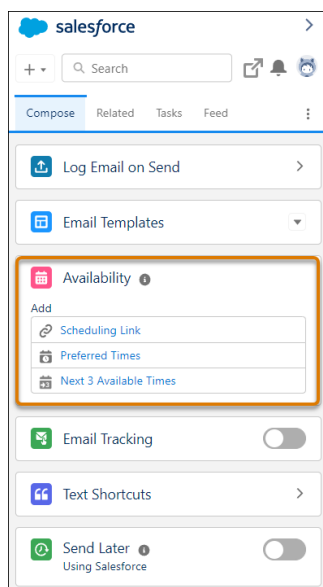
Propose Future Meeting Times Easily in Outlook and Gmail Integrations

When reps send an email to a customer, they can quickly add three upcoming meeting times as a suggestion. We insert the first available meeting for each of the next three business days, excluding the current business day.

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.

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: Reps start composing an email in the Outlook or Gmail integration. In the Salesforce pane, they click **Next 3 Available Times** to insert the times in the email.



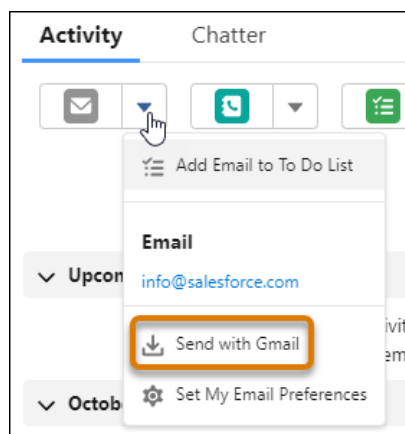
Remind Users Automatically to Install the Outlook and Gmail Extension

Now there's no excuse for your users to forget to install their Outlook or Gmail extension. With the extension, they can take advantage of the Outlook and Gmail integrations you've set up.


Where: This change applies to Lightning Experience and Salesforce Classic in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions. Salesforce Inbox, Enhanced Email, and Outlook or Gmail integration must be enabled.

Who: Users with the Use Inbox user permission, available with a High Velocity Sales, Sales Cloud Einstein, or Inbox license, can use this feature.

Why: After the Outlook or Gmail integration is set up, all that's left is for users to connect to it.



In the email dropdown, your users see the reminder to connect.

 **Note:** Depending on your setup, users see reminders for Gmail and Outlook.

How: Your users click the reminder. Then we send them to the Salesforce store to download the software.

Sales Dialer

Protect your teams' calls from being marked as spam by verifying your company's information.


IN THIS SECTION:

[Guard Your Outgoing Calls Against Robocalling Filters](#)

You can now protect your teams' calls from being marked as spam with new STIR/SHAKEN protocols. These protocols validate your outbound calls after your company's information is verified, so your teams can reach their customers without being blocked.

Guard Your Outgoing Calls Against Robocalling Filters

You can now protect your teams' calls from being marked as spam with new STIR/SHAKEN protocols. These protocols validate your outbound calls after your company's information is verified, so your teams can reach their customers without being blocked.

 **Note:** For now, we support outgoing calls only to the United States and Canada.

Where: This change applies to Sales Dialer in Lightning Experience. Sales Dialer is available for an additional cost in Essentials, Professional, Enterprise, and Unlimited editions.

Why: Verify your company's information with our telephony provider, Twilio, to prevent outbound calls from being mistaken for intrusive automated recordings.

How: To get started, go to **Trusted Calling** in Setup. Enter your company's information and submit it to Twilio. It can take from 24 to 48 hours for Twilio to review your submission.

Sales Engagement

Let sales reps build their own processes to manage cadence targets they own, create their own outreach action templates, add targets to multiple cadences, and complete cadence tasks directly from the To Do List.

Sales Engagement and its features are included with Sales Cloud 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:

[Let Users Optimize Their Sales Process and Automate Repetitive Tasks \(Beta\)](#)

Automated Actions save users time by letting them easily build their own processes to manage cadence targets they own. With simple if-this-then-that logic, users can automatically add, remove, pause, or resume cadence targets and change target assignees based on criteria they choose. For example, users can create automated actions to add new leads assigned to them to a cadence.

[Let Reps Create Their Own Outreach Templates with Quick Cadences](#)

With quick cadences, reps can create personal templates to save time by easily adding their own outreach steps to their To Do List and Work Queue. Users can create quick cadences for calls, emails, LinkedIn InMail, and custom steps. Then they can assign a quick cadence to leads, contacts, and person accounts to take action later.

[Assign Targets to Multiple Cadences for Separate Purposes](#)

Now managers can assign the same target to different cadences to achieve different goals. For example, add a target to one cadence for collecting a current invoice and another for cross-selling additional products.

[Let Call Scripts Suggest a Cadence for a Recipient](#)

When your reps select a call script while calling a customer, we check to see if another cadence uses that call script for its first step. When logging the call, reps are prompted to add the person who was called to the matching cadence, or to choose among other matching cadences. Your company can reuse existing cadences designed to guide reps through the prospecting and opportunity nurturing processes.

[Complete Cadence Tasks Directly from the To Do List](#)

Now users can save time and get even more done. Users can perform call, email, LinkedIn, and all other cadence tasks faster without leaving the To Do List.

[Automatically Assign New Leads to a Cadence](#)

Save sales reps and managers time by assigning new leads to a cadence automatically with the new Add Lead to Cadence standard autolaunched flow template.

[Wait Steps Respect the Skip Weekends Setting](#)

Wait steps in cadences now respect the Skip Weekends setting in Sales Engagement Setup. For example, if a wait step finishes on a Saturday, the next action step in the cadence won't run or appear in users' Work Queue or To Do List until Monday. This change also prevents auto emails from sending on weekends.

Let Users Optimize Their Sales Process and Automate Repetitive Tasks (Beta)

Automated Actions save users time by letting them easily build their own processes to manage cadence targets they own. With simple if-this-then-that logic, users can automatically add, remove, pause, or resume cadence targets and change target assignees based on criteria they choose. For example, users can create automated actions to add new leads assigned to them to a cadence.

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



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

products and features. Salesforce doesn't guarantee general availability of this feature within any particular time frame or at all, and we can discontinue it at any time. This feature is for evaluation purposes only, not for production use. It's offered as is and isn't supported, and Salesforce has no liability for any harm or damage arising out of or in connection with it. All restrictions, Salesforce reservation of rights, obligations concerning the Services, and terms for related Non-Salesforce Applications and Content apply equally to your use of this feature.

Who: This feature is available to users with the Sales Engagement User or Sales Engagement Cadence Creator permission and the Automated Action User permission.

How: In Automated Actions Setup, turn on `Allow users to create automated actions`. Then assign users the Automated Action User permission. Assigned users can create up to 50 automated actions.

In the Sales Engagement app, users go to Automated Actions. They click `New` and then choose the task they want to perform.

New Automated Action

Eliminate tedious tasks and start running on autopilot. Specify an action to perform, conditions that trigger the action, and kick off automations on records you own.

Actions

Select the action you want to perform.

* Action

Assign Target to Cadence

* Cadence

Search Cadences...

Assign target to: *i*

☒ Me

☐ Another Sales Engagement user

Cancel Save

Next, they choose the object they want to set conditions for and the field value conditions that trigger the action. Leads, contacts, person accounts, opportunities, cases, invoices, and engagements can trigger automated actions.

New Automated Action

Eliminate tedious tasks and start running on autopilot. Specify an action to perform, conditions that trigger the action, and kick off automations on records you own.

Actions
Conditions
 Name and Description

Conditions

Select the object to work with and the conditions that trigger your action. The items shown in this section depend upon the action you choose above.

* Object ⓘ

Lead

Cadence Target ⓘ

The lead that triggered the action.

Conditions ⓘ

* Check whether to perform the action when:

☒ A record is created

☐ A record is created, and every time a field in the conditions is edited

Take Action When

All conditions are met (AND) ▼

Cancel
 Save

Users can create automated actions from two other locations in the Sales Engagement app.

- When manually adding a target to a cadence, users can automate adding records to that cadence by selecting **Add an Automated Action?**.
- When creating a quick cadence, users can automate adding records to the quick cadence by selecting **Add an Automated Action?**.

After saving each automated action, the user must activate it. Automated actions execute asynchronously.

For each user, five automated actions are included in the Winter '23 release.

- Assign Inbound Lead to Cadence
- Remove Opted Out Lead From Cadence
- Remove Opted Out Contact From Cadence
- Assign Lost Opportunity Primary Contact to Cadence
- Remove Replied Buyer From Cadence

Let Reps Create Their Own Outreach Templates with Quick Cadences

With quick cadences, reps can create personal templates to save time by easily adding their own outreach steps to their To Do List and Work Queue. Users can create quick cadences for calls, emails, LinkedIn InMail, and custom steps. Then they can assign a quick cadence to leads, contacts, and person accounts to take action later.

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

Who: This feature is available to users with the Sales Engagement Cadence Creator permission or the Sales Engagement User and Sales Engagement Quick Cadence Creator permissions.

Why: By creating a quick cadence, users can customize their outreach, add follow-ups to their Work Queue and To Do List, and avoid repetitive work. When users create a quick cadence for a call or email, they can include a call script or email template. Then they can assign the quick cadence to leads, contacts, or person accounts to remind themselves to perform the outreach later.

How: To let sales reps create quick cadences, assign them the Sales Engagement Quick Cadence Creator permission. Managers who have the Sales Engagement Cadence Creator or Sales Cadence Creator Included permission can also create quick cadences.



Note: If you have assigned users a cloned or custom permission set created before Spring '23, you may need to add the Create and Edit Standard Cadences permission to the permission set again in Spring '23.

In the Cadences tab of the Sales Engagement app, users click New Cadence and then choose the type of outreach.

New Cadence

Reach out to customers and prospects with targeted messaging.

Quick Cadence

Create personal communication templates that you can quickly assign to your To Do List.

Make a Call

Manual Email

Custom Task

LinkedIn InMail

LinkedIn Connection Request

Cadence Builder

Managers, guide your sales teams with a multi-step engagement program.

Launch Builder

Then they provide the details for the outreach, such as an email.

New Quick Cadence

Manual Email

* Name
Cross-sell email

Description
Quick cadence to send the cross-selling email template.

Email Template
Search email templates...

Add an Automated Action?
When you're finished here, you can automate adding targets to this cadence.

Add Automated Action ☐

Cancel Save

Users' quick cadences are saved in their My private Cadences folder.


Assign Targets to Multiple Cadences for Separate Purposes


Now managers can assign the same target to different cadences to achieve different goals. For example, add a target to one cadence for collecting a current invoice and another for cross-selling additional products.

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

How: In Sales Engagement Setup, Assign Targets to Multiple Cadences is turned on by default. You can disable it if you prefer to allow only one cadence per target. Turning off this feature prevents new targets from being added to multiple cadences but doesn't remove targets from any cadences.


Users can add targets to up to five cadences. The Sales Engagements component on target records shows pending steps for all cadences the target is assigned.


 **Sales Engagements**





Last refreshed a few seconds ago


Last engaged:


Engagements within 30 days: 


 0




 0


 0

 0

 0



Cadences (2) 


 Send Video Information  


 **Cross-Sell Office Supplies**

Assigned to Logan Valencia

Steps 0 completed [View Steps](#)



  Today

 Make a call

 **Winter Cadence**

Assigned to Logan Valencia

Steps 0 completed [View Steps](#)

  Today

The pause, resume, remove, and change target assignee actions let users choose whether the action applies to one or more of the target's assigned cadences.

Pause target in cadence

• Which of this target's cadences do you want to pause?

A specific cadence ▼

• Cadences

Choose... 🔍

• When should the cadence resume?

1 Hour ▼

Cancel Pause

Let Call Scripts Suggest a Cadence for a Recipient

When your reps select a call script while calling a customer, we check to see if another cadence uses that call script for its first step. When logging the call, reps are prompted to add the person who was called to the matching cadence, or to choose among other matching cadences. Your company can reuse existing cadences designed to guide reps through the prospecting and opportunity nurturing processes.

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

Who: This feature is available to users with access to Sales Engagement, which is available in Performance and Unlimited Editions, and for an extra cost in Enterprise Edition. Users also need Sales Dialer enabled. This feature is available for an additional cost in Essentials, Professional, Enterprise, and Unlimited editions.

How: The rep starts a call and selects a call script. After the call ends, the rep is prompted to log the call.

Log a Call - Call to Lewis Hamilton at +1 (415) 555-3122

Some cadences use the call script you selected. ⓘ

➔ After you log the call, we'll add **Lewis Hamilton** to this cadence: [Call with call script specified.](#) ☒ ▼

* Call Result:

[Connected](#) [Left Voicemail](#) [No Answer](#) ▼

Subject

Call to Lewis Hamilton at +1 (415) 555-3122 unsuccessful 🔍

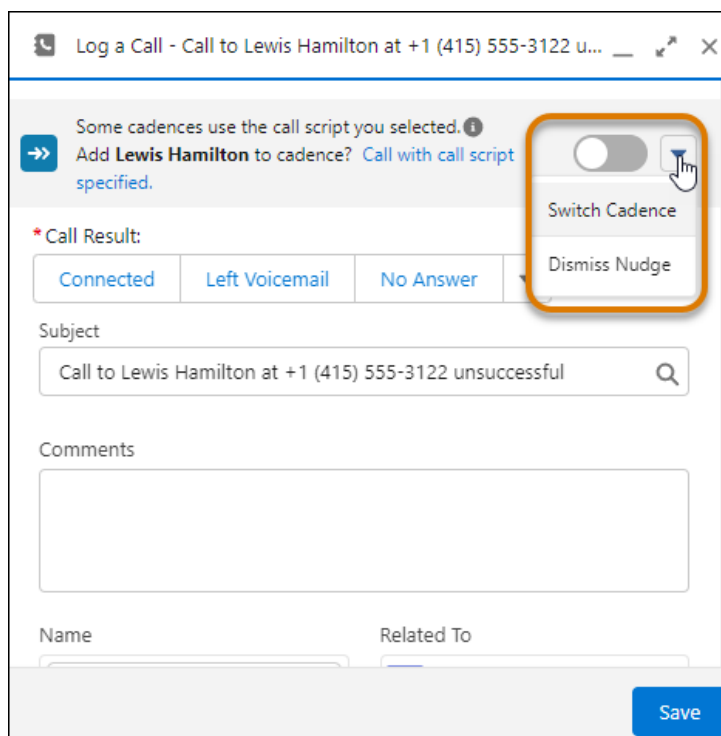
Comments

They're interested in our offerings| 💬

Name Related To

Save

If a cadence starts with a call using the same call script, the rep sees a prompt asking if they want to add the recipient to the cadence.



The rep enables the toggle or selects **Switch Cadence** to see which other cadences match the criteria.

After the call is logged, the recipient is added to the chosen cadence and moved to the second step of the cadence.

Complete Cadence Tasks Directly from the To Do List

Now users can save time and get even more done. Users can perform call, email, LinkedIn, and all other cadence tasks faster without leaving the To Do List.

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

Automatically Assign New Leads to a Cadence

Save sales reps and managers time by assigning new leads to a cadence automatically with the new Add Lead to Cadence standard autolaunched flow template.

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

How: Clone the Add Lead to Cadence flow template and then set the CadenceID, PrimarySalesEngagementPermissionSetId, and SecondarySalesEngagementPermissionSetId parameters.

Wait Steps Respect the Skip Weekends Setting

Wait steps in cadences now respect the Skip Weekends setting in Sales Engagement Setup. For example, if a wait step finishes on a Saturday, the next action step in the cadence won't run or appear in users' Work Queue or To Do List until Monday. This change also prevents auto emails from sending on weekends.

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

Revenue Intelligence

Try Account Discovery, a new Revenue Intelligence feature that provides dashboards and Einstein Discovery models. Account Discovery helps you see which of your accounts has potential for upside growth and which need attention. See the new forecast trending chart or Einstein Discovery models in Revenue Insights. If you have created multiple forecast types in Collaborative Forecasts, you can now switch between them in Revenue Insights.

IN THIS SECTION:

[Get Account Health Details with Account Discovery](#)

Account Discovery provides dashboards and Einstein Discovery models to help you see which of your accounts has potential for upside growth and which need attention.

[See Historical Trends for Your Forecast Items](#)

If you've enabled forecast trending in Collaborative Forecasts, you can view the new forecast trending chart in Revenue Insights. You can see how your current forecast compares to the same time period in previous forecasts. For example, if you have 20 days left in Q4, the chart compares your forecast to the previous quarters when you had 20 days left.

[Switch Between Different Forecast Types in Revenue Insights](#)

If you've created multiple forecast types in Collaborative Forecasts, you can now switch between them in Revenue Insights. Previously, you needed to create multiple versions of Revenue Insights to accommodate multiple forecast types.

[Maximize Your Deal Size and Win Rate, and Reduce Time to Close](#)

Get new predictive insights from Einstein Discovery models directly in your Revenue Insights dashboard. Einstein Discovery uses machine learning to create predictive models. The model predictions help you understand what activities promote positive and negative outcomes, and Revenue Insights presents it in a simple visual way that's easy to understand. You can see predictions for Deal Size, Win Rate, and Time to Close.

Get Account Health Details with Account Discovery

Account Discovery provides dashboards and Einstein Discovery models to help you see which of your accounts has potential for upside growth and which need attention.

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.

Who: To create Account Discovery, you must have a Revenue Intelligence Admin permission set. To access the Account Discovery app, users must have a Revenue Intelligence User permission set.

How: You can view Account Health, Accounts with Potential for Upside, and Einstein Discovery models from the Accounts page in Sales Cloud.

Predicted Account Health & Upside

Account Name

Account Type

Account Owner

Account Contact

Account Health

Accounts with Upside

All Accounts

1

Account Name	Health	Engagement	Win Rate	Avg Deal Size	Purchased Products	Total Spend	Upside	# Pipeline	\$ Pipeline	Activities
Acme	99	Low	74%	\$240.0k	1	\$132.9k	99	# 1.7k	\$99.5k	Last 6 days ago
ForecastAcc_155	91	Low	52%	\$57.5k	1	\$10.7k	91	# 1.7k	\$101.5k	Last 6 days ago
ForecastAcc_200	78	Low	54%	\$47.4k	-	\$1.3k	78	# 229	\$11.5k	Last 6 days ago
ForecastAcc_208	92	Low	51%	\$51.5k	1	\$9.3k	92	# 1.8k	\$108.7k	Last 6 days ago
ForecastAcc_2034	93	Low	49%	\$52.6k	1	\$10.6k	93	# 1.7k	\$102.4k	Last 7 days ago
ForecastAcc_2051	78	Low	50%	\$52.6k	-	\$1.8k	78	# 233	\$11.3k	Last 6 days ago
ForecastAcc_2188	98	Low	49%	\$48.4k	1	\$8.5k	98	# 1.6k	\$111.5k	Last 6 days ago
ForecastAcc_2196	83	Low	44%	\$25.5k	1	\$2.3k	83	# 277	\$25.5k	Last 6 days ago
ForecastAcc_2286	99	Low	47%	\$47.2k	-	\$7.5k	99	# 1.7k	\$100.1k	Last 6 days ago
ForecastAcc_2373	90	Low	50%	\$54.3k	-	\$9.7k	90	# 1.7k	\$100.6k	Last 6 days ago

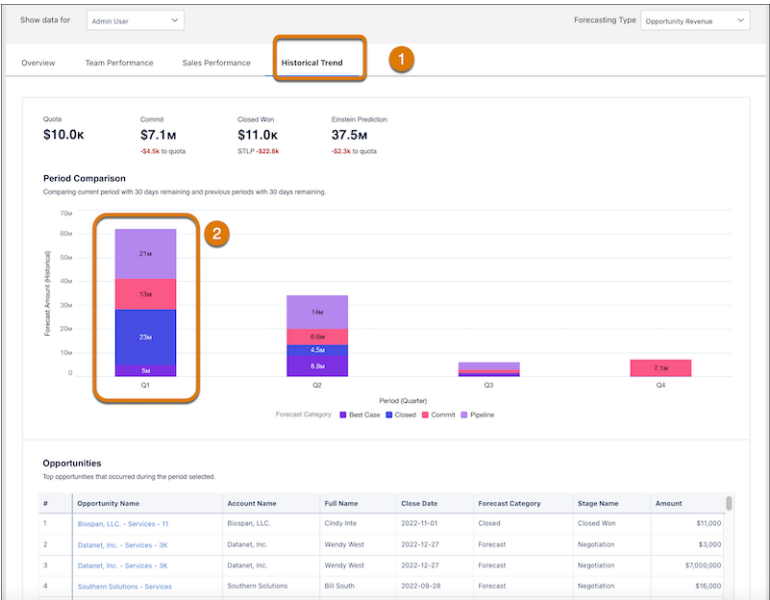
See Historical Trends for Your Forecast Items

If you've enabled forecast trending in Collaborative Forecasts, you can view the new forecast trending chart in Revenue Insights. You can see how your current forecast compares to the same time period in previous forecasts. For example, if you have 20 days left in Q4, the chart compares your forecast to the previous quarters when you had 20 days left.

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.

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 you enable Revenue Insights, the app checks whether you've enabled forecast trending for your forecast item. If you have, the chart is created.



To open the chart, click **Historical Trend** (1). Click the columns to populate the Opportunities table (2).

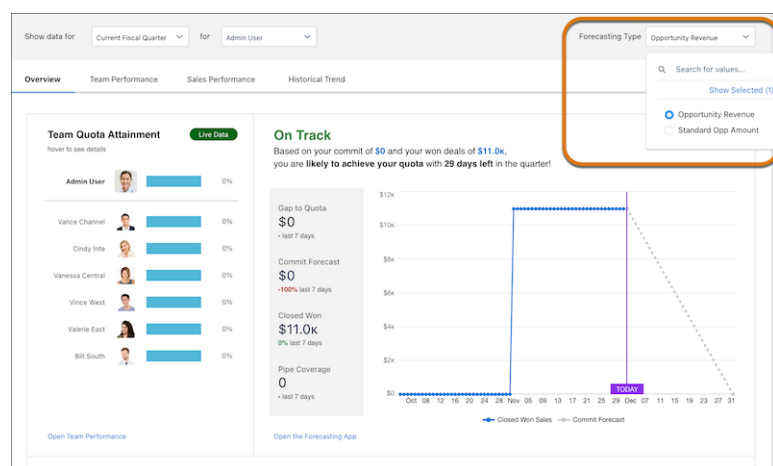
Switch Between Different Forecast Types in Revenue Insights

If you've created multiple forecast types in Collaborative Forecasts, you can now switch between them in Revenue Insights. Previously, you needed to create multiple versions of Revenue Insights to accommodate multiple forecast types.

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.

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 you enable Revenue Insights, the app detects the forecast types you created in Collaborative Forecasts. When you view Revenue Insights dashboards, you can select a forecast type from the dropdown menu.



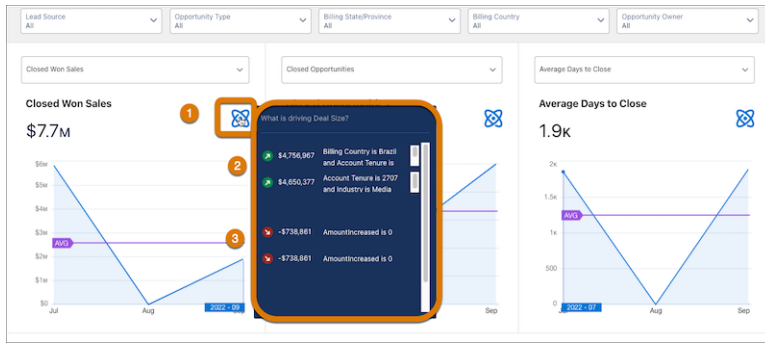
Maximize Your Deal Size and Win Rate, and Reduce Time to Close

Get new predictive insights from Einstein Discovery models directly in your Revenue Insights dashboard. Einstein Discovery uses machine learning to create predictive models. The model predictions help you understand what activities promote positive and negative outcomes, and Revenue Insights presents it in a simple visual way that's easy to understand. You can see predictions for Deal Size, Win Rate, and Time to Close.

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.

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: To view the new Einstein Discovery models, go to the Sales Performance tab in Revenue Insights.



Click the Einstein Discovery icon to open the insights (1). Einstein Discovery shows positive factors with green arrows pointing up (2). Einstein Discovery shows detrimental factors with red arrows pointing down (3).

Pipeline Inspection

See changes to your pipeline over time with a group of metrics. Edit multiple opportunity record types inline in Pipeline Inspection list views.

IN THIS SECTION:

[Get Pipeline Inspection in Enterprise Edition Without an Add-On License](#)

As of March 2023, you can access Pipeline Inspection in Enterprise Edition with Sales Cloud without purchasing an add-on license for it. Use this consolidated view of key pipeline metrics, recent changes, and activity details to focus on the most important opportunities and close more deals.

[View Pipeline Changes for Key Time Periods in Pipeline Inspection](#)

Sales teams can now use a set of metrics that show changes to deals over time to better understand the health of their pipeline. Previously, they could view their pipeline only with forecast category metrics.

[Edit Opportunities with Multiple Record Types Inline in Pipeline Inspection List Views](#)

Save time by editing opportunities of multiple record types inline in the same list view. Users no longer have to filter list views by one record type to edit opportunities inline.

Get Pipeline Inspection in Enterprise Edition Without an Add-On License

As of March 2023, you can access Pipeline Inspection in Enterprise Edition with Sales Cloud without purchasing an add-on license for it. Use this consolidated view of key pipeline metrics, recent changes, and activity details to focus on the most important opportunities and close more deals.

Where: This change applies to Lightning Experience in Enterprise Edition with Sales Cloud. Pipeline Inspection isn't enabled automatically.

When: You can access Pipeline Inspection in Enterprise Edition as of March 14, 2023.

Who: This feature is available as part of the Sales Cloud license at no extra cost. To use Pipeline Inspection, users must have the Pipeline Inspection or Revenue Intelligence permission set.

How: To see Pipeline Inspection in sandboxes, run Match Production License or request a refresh after the feature is available in production.

SEE ALSO:

[Salesforce Help: Push Updated Licenses to Sandbox Orgs \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Set Up Pipeline Inspection \(can be outdated or unavailable during release preview\)](#)

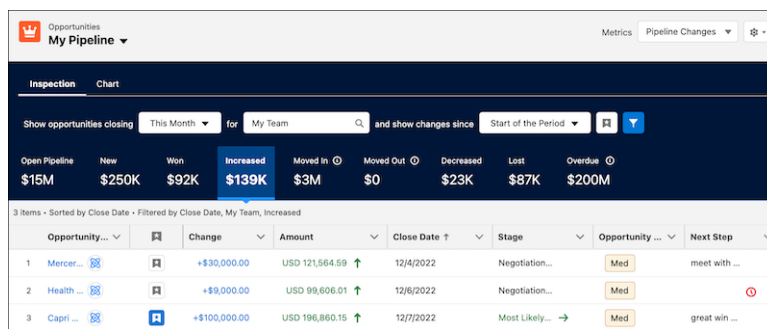
[Salesforce Help: Drive Predictable Revenue with Pipeline Inspection \(can be outdated or unavailable during release preview\)](#)

View Pipeline Changes for Key Time Periods in Pipeline Inspection

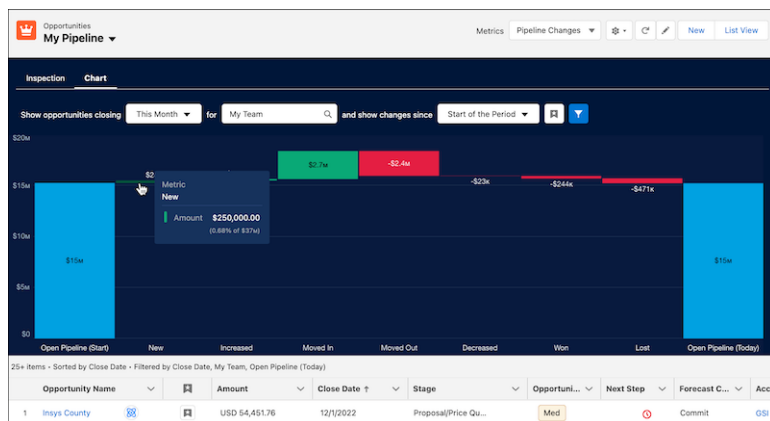
Sales teams can now use a set of metrics that show changes to deals over time to better understand the health of their pipeline. Previously, they could view their pipeline only with forecast category metrics.

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.

Why: With metrics such as new opportunities created, increases or decreases in amounts, and overdue opportunities, sales teams can focus on the right deals and determine next steps to close deals. Also, a Change field helps pinpoint how fluctuations in individual opportunities impact the overall pipeline when viewing the Increased and Decreased metrics filters.



Users can also visualize the pipeline changes metrics in a waterfall chart.



How: To manage which metrics users see, go to Pipeline Inspection Setup. You control the visibility of the metrics types in the Define How Metrics Are Grouped section. By default, both the Pipeline Changes and Forecast Category metrics are enabled. Users can switch between the pipeline changes metrics and the forecast category metrics using a dropdown menu.

SEE ALSO:

[Salesforce Help: Manage Pipeline Inspection Metrics \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Pipeline Inspection Metrics and Fields \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Turn On Pipeline Inspection \(can be outdated or unavailable during release preview\)](#)

Edit Opportunities with Multiple Record Types Inline in Pipeline Inspection List Views

Save time by editing opportunities of multiple record types inline in the same list view. Users no longer have to filter list views by one record type to edit opportunities inline.

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: On any Pipeline Inspection list view, hover over the field that you want to edit. If you see a pencil icon, click it, modify the value, and save. A lock icon means that the field isn't available for inline editing.

SEE ALSO:

[Salesforce Help: Managing Pipelines with Pipeline Inspection \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Guidelines and Limits for Pipeline Inspection \(can be outdated or unavailable during release preview\)](#)

Enablement for Sales Teams

See how your sales teams can benefit from the exciting new features available for Enablement. Use Einstein Conversation Insights data in outcomes and milestones to verify that your programs are changing how reps talk to customers. Plus, your Enablement teams get a slew of new features to help build programs quickly, easily, and to their preferred specifications.

IN THIS SECTION:

[Find Out What's New for Enablement](#)

Embed voice and video conversation coaching opportunities into your Enablement programs using your Einstein Conversation Insights data. Plus, Enablement programs are easier to build and more engaging to take. Enablement teams can set distinct outcomes for users in their programs, clone programs and measures, and build measures from a new user experience with plenty of built-in guidance. And Enablement team members can add a new text-based exercise to programs that lets content creators deliver custom Enablement content directly in Salesforce.

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Where: This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions with the Enablement add-on license.

SEE ALSO:

[Enablement](#)

Einstein Conversation Insights

Einstein Conversation Insights now supports reporting on insights in voice and video calls. Sales managers can embed conversation measures into their Enablement programs. Some forms of personal information are masked from recordings.

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.

Admins can run the Einstein Conversation Insights Assessor, which analyzes your current Salesforce implementation and provides a report that indicates your company's readiness for using it.

IN THIS SECTION:

[Report on Insights from Voice and Video Calls](#)

Sales managers can now report on conversation insights in voice and video calls, so they can quickly see measures such as which reps are the top listeners or who received the most coaching. Use the new Unified Voice Call, Unified Video Call, and Unified Activity Insights objects to access reports and report types relevant to your sales teams.

[Call Transcripts Hide Personal Information](#)

Concerned about the handling of personal information on your teams' calls? Einstein Conversation Insights now hides credit card information from transcripts if they're mentioned in voice and video calls.

[Get Improved Contact Matching for Video Calls](#)

Einstein Conversation Insights identifies video call participants automatically for some video calls. Call owners using Salesforce Inbox or Einstein Activity Capture (EAC) calendar integration can have contacts added as related records if they're matched during a video call.

[Use Conversation Insights Measures with Enablement](#)

Sales managers can embed voice and video measures into their Enablement programs, and see conversation data in reports and dashboards.

[Assess Your Readiness and Return on Investment for Einstein Conversation Insights](#)

Einstein Conversation Insights provides insights and identifies trends from recorded voice and video calls that sales agents have with their customers. It analyzes recorded interactions for keywords and phrases, enabling sales managers to provide personalized teachable moments for each sales representative. The new Einstein Conversation Insights Assessor analyzes your current Salesforce implementation and provides a report that indicates your company's readiness for using it. The Einstein Conversation Insights Assessor also provides a return on investment (ROI) estimate. That way, you know what you need to do before you can implement Einstein Conversation Insights and the business value that you can expect after you implement it.

SEE ALSO:

[Einstein Release Notes](#)

Report on Insights from Voice and Video Calls

Sales managers can now report on conversation insights in voice and video calls, so they can quickly see measures such as which reps are the top listeners or who received the most coaching. Use the new Unified Voice Call, Unified Video Call, and Unified Activity Insights objects to access reports and report types relevant to your sales teams.

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 small and medium-sized orgs using Einstein Conversation Insights. Orgs with over 10,000 users aren't eligible to use this feature in Spring '23.

How: To access insights reports, go to **General Settings** under Einstein Conversation Insights in Setup. Turn on **Insight Reports and Conversation-related Measures for Enablement**.

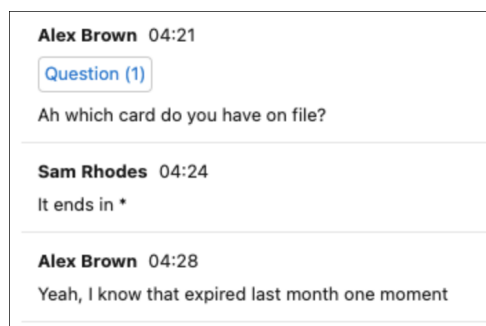
Call Transcripts Hide Personal Information

Concerned about the handling of personal information on your teams' calls? Einstein Conversation Insights now hides credit card information from transcripts if they're mentioned in voice and video calls.

Where: This change applies to Einstein Conversation Insights in Lightning Experience. Einstein Conversation Insights is available in Performance and Unlimited editions and as an add-on in Enterprise Edition.

Who: This feature is available to users with access to Einstein Conversation Insights.

Why: Credit card details mentioned during calls are hidden from transcripts in voice and video calls. Information about credit cards can still be heard in recordings.



Get Improved Contact Matching for Video Calls

Einstein Conversation Insights identifies video call participants automatically for some video calls. Call owners using Salesforce Inbox or Einstein Activity Capture (EAC) calendar integration can have contacts added as related records if they're matched during a video call.

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, Salesforce Inbox, and Einstein Activity Capture.

How: ECI uses a call owner's Salesforce Inbox information or EAC calendar integration to match call participants with existing contact records. If a match is found, the contact is added as a related record to the video call. This links the two records, and call details and insights are displayed on the related contact record.

Use Conversation Insights Measures with Enablement

Sales managers can embed voice and video measures into their Enablement programs, and see conversation data in reports and dashboards.

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 now available to users with access to Enablement.

How: To access conversation insights measures, go to **General Settings** under Einstein Conversation Insights in Setup. Turn on **Insight Reports and Conversation-related Measures for Enablement**.

SEE ALSO:

[Add Einstein Conversation Insights in Enablement Programs](#)

Assess Your Readiness and Return on Investment for Einstein Conversation Insights

Einstein Conversation Insights provides insights and identifies trends from recorded voice and video calls that sales agents have with their customers. It analyzes recorded interactions for keywords and phrases, enabling sales managers to provide personalized teachable moments for each sales representative. The new Einstein Conversation Insights Assessor analyzes your current Salesforce implementation and provides a report that indicates your company's readiness for using it. The Einstein Conversation Insights Assessor also provides a return on investment (ROI) estimate. That way, you know what you need to do before you can implement Einstein Conversation Insights and the business value that you can expect after you implement it.

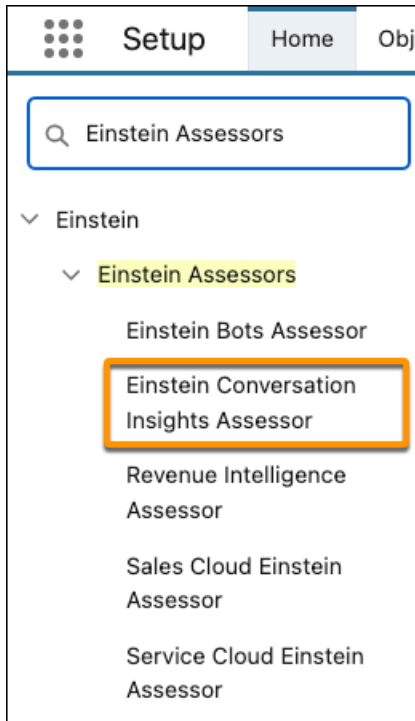
Where: This change applies to Lightning Experience in:

- Sales Engagement in Performance and Unlimited editions
- Sales Engagement in Enterprise Edition for an additional cost

The Einstein Conversation Insights Assessor is available at no additional cost.

Einstein Conversation Insights is not supported in Experience Cloud or Government Cloud.

How: To get started, go to the Assessors page in Setup.



You can also go directly to the assessor and follow the instructions to let Salesforce access your data.

SEE ALSO:

[Salesforce Help: Run the Einstein Conversation Insights Assessor](#)

Integration with Microsoft®

Easily discover the final steps in your migration from Lightning Sync to Einstein Activity Capture.

IN THIS SECTION:

[Lightning Sync for Microsoft® Exchange \(End of Sale\)](#)

Easily discover and complete the final steps in your migration from Lightning Sync to Einstein Activity Capture using the improved onboarding experience.

[Salesforce for Outlook \(Retiring\)](#)

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.

Lightning Sync for Microsoft® Exchange (End of Sale)

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IN THIS SECTION:

[Get Ready to Roll Out Einstein Activity Capture for Microsoft](#)

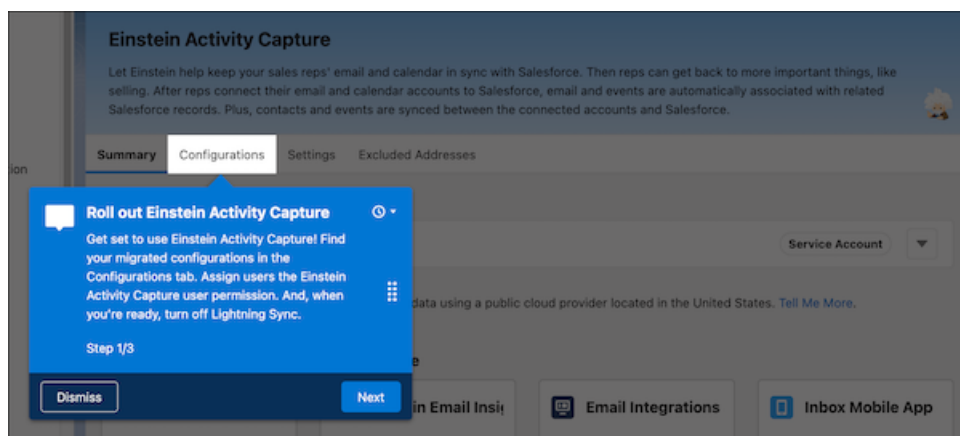
Our improved onboarding experience helps you easily discover and complete the final steps of your migration from Lightning Sync to Einstein Activity Capture. The first time you visit the Einstein Activity Capture settings page, an in-app walkthrough shows you how to give users access to features and wrap up your migration.

Get Ready to Roll Out Einstein Activity Capture for Microsoft

Our improved onboarding experience helps you easily discover and complete the final steps of your migration from Lightning Sync to Einstein Activity Capture. The first time you visit the Einstein Activity Capture settings page, an in-app walkthrough shows you how to give users access to features and wrap up your migration.

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 Microsoft 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.



SEE ALSO:

[Get the Latest In-App Content](#)

[Knowledge Article: Lightning Sync: Not Available for New Customers as of Winter '21](#)

[Salesforce Help: Kick Off Your Migration to Einstein Activity Capture \(can be outdated or unavailable during release preview\)](#)

Salesforce for Outlook (Retiring)

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.

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[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.

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:

[Knowledge Article: Salesforce for Outlook Retirement](#)

[Salesforce Help: Move from Salesforce for Outlook to the Next-Generation Products \(can be outdated or unavailable during release preview\)](#)

[Trailblazer Community: Salesforce for Outlook Release Notes](#)

Integration with Google

Easily discover final steps in your migration from Lightning Sync to Einstein Activity Capture.

IN THIS SECTION:

[Lightning Sync for Google \(End of Sale\)](#)

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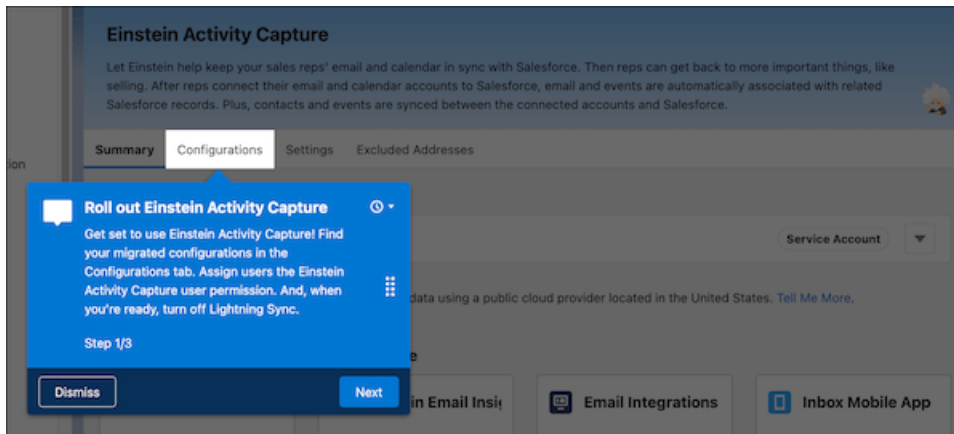
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Where: This change applies to Lightning Experience in Professional, Enterprise, Performance, and Unlimited editions.

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.



SEE ALSO:

[Get the Latest In-App Content](#)

[Knowledge Article: Lightning Sync: Not Available for New Customers as of Winter '21](#)

[Salesforce Help: Kick Off Your Migration to Einstein Activity Capture \(can be outdated or unavailable during release preview\)](#)

Salesforce Maps Portfolio

Build marker layers that resonate with more sales and service reps visually. While you build those marker layers, identify potential errors before you save your work. Get sign-off from key stakeholders so that you activate territory models quickly and with fewer delays. And spend more time designing territories and less time waiting for data-intensive alignments to load.

IN THIS SECTION:

[Salesforce Maps](#)

Design marker layers for greater accessibility and reduce potential errors when you address validation alerts before you save your layers.

[Salesforce Maps Territory Planning](#)

Activate territory models with fewer delays when you specify who can approve them and in what sequence. Spend more time planning and less time waiting for data-intensive alignments to load. Identify locked units in published alignments. And let other stakeholders request access to alignments.

Salesforce Maps

Design marker layers for greater accessibility and reduce potential errors when you address validation alerts before you save your layers.

IN THIS SECTION:

[Style Your Markers for Greater Visibility](#)

Design marker layers that align with Salesforce accessibility standards to help your team meet their sales goals. When you build marker layers in Salesforce Maps, choose from standard, accessibility-compliant colors and shapes or from the classic ones that you're familiar with. When you select a standard marker shape, its border, center, and shadow adjust for accessibility no matter what color you choose. When you select a standard marker color, markers have better visibility no matter what shape you choose.

[Build Marker Layers with Confidence](#)

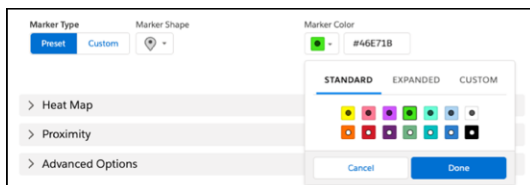
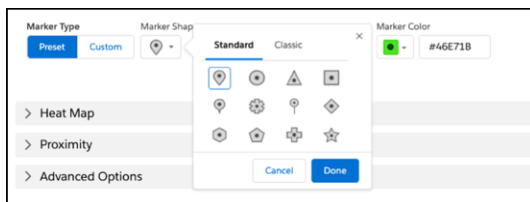
Avoid errors and specify marker labels when you build marker layers in Salesforce Maps. Differentiate records using the shapes and colors or your choice.

Style Your Markers for Greater Visibility

Design marker layers that align with Salesforce accessibility standards to help your team meet their sales goals. When you build marker layers in Salesforce Maps, choose from standard, accessibility-compliant colors and shapes or from the classic ones that you're familiar with. When you select a standard marker shape, its border, center, and shadow adjust for accessibility no matter what color you choose. When you select a standard marker color, markers have better visibility no matter what shape you choose.

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

How: Build a marker layer and select a standard shape and color for your markers.



SEE ALSO:

[Salesforce Help: Create Marker Layers](#)

Build Marker Layers with Confidence

Avoid errors and specify marker labels when you build marker layers in Salesforce Maps. Differentiate records using the shapes and colors or your choice.

Where: These changes apply to Lightning Experience and Salesforce Classic in Professional, Enterprise, Unlimited, and Developer editions.

Why: When you build marker layers, you now:

- Reduce potential errors when you review and address validation messages before you save your work.
- Get the option to choose a field to use as a marker label when the labeled pins marker is plotted on the map.

- Identify specific records easily when you change their markers' colors and shapes. Save time by searching for record names instead of entering them manually when you set up marker styles based on ID fields.
- Get guidance in hover text for determining which markers appear on the map.
- See simplified proximity settings. You no longer see Proximity Type, because it's always set to circle.

SEE ALSO:

[Salesforce Help: Create Marker Layers](#)

Salesforce Maps Territory Planning

Activate territory models with fewer delays when you specify who can approve them and in what sequence. Spend more time planning and less time waiting for data-intensive alignments to load. Identify locked units in published alignments. And let other stakeholders request access to alignments.

IN THIS SECTION:

[Establish Sequential Approvals for Alignments](#)

Put territory models into action with fewer delays when you get sign-off from key stakeholders in the order that you specify using Salesforce approval processes. Limit each stakeholder's access to specific alignments as you apply the principle of least privilege when you select Salesforce as your approval method in Salesforce Maps Territory Planning.

[Plan Large Territory Models in Less Time](#)

Design territories without waiting for alignments with high data volumes to load on the map. Reduce loading times when you set up Salesforce Maps Territory Planning to process data in parallel.

[Map New Boundaries](#)

Discover the latest available boundaries that help you reach sales goals as you carve optimal 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 Improvements in Salesforce Maps Territory Planning](#)

Stay informed about alignments that your team is working on by requesting access to view them. Indicate the units whose assignments you want to preserve in published alignments. And search for records to see their assignment details.

Establish Sequential Approvals for Alignments

Put territory models into action with fewer delays when you get sign-off from key stakeholders in the order that you specify using Salesforce approval processes. Limit each stakeholder's access to specific alignments as you apply the principle of least privilege when you select Salesforce as your approval method in Salesforce Maps Territory Planning.

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

How: In Salesforce, set up an approval process that determines what happens when alignment owners request approvals. Include details such as assigning multiple reviewers and initiating sequenced steps before activating the approval process.

Approval Processes Help for this Page ?

Territory Planning Alignment: Territory Model Approvals

[« Back to Approval Process List](#)

Process Definition Detail Edit ▼ Clone Deactivate

Process Name	Territory Model Approvals			Active	✓
Unique Name	Territory_Model_Approvals	Next Automated Approver Determined By	Manager of Record Submitter		
Description					
Entry Criteria					
Record Editability	Administrator ONLY	Allow Submitters to Recall Approval Requests	<input type="checkbox"/>		
Approval Assignment Email Template					
Initial Submitters	Territory Planning Alignment Owner				
Created By	Admin User, 12/1/2022, 7:45 AM	Modified By	Noella Northern, 12/1/2022, 5:23 PM		

Initial Submission Actions i Add Existing Add New ▼

Action	Type	Description
Record Lock		Lock the record from being edited

Approval Steps i

Action	Step Number	Name	Description	Criteria	Assigned Approver	Reject Behavior
Show Actions Edit	1	Submit to Manager			Manager	Final Rejection
Show Actions Edit	2	Submit to Admin			User:Muhammed Aziz	Final Rejection

Then, in Territory Planning, select to use Salesforce as your approval method.

Alignment Approval Enabled

Approval Method for All Alignments

Salesforce ▼

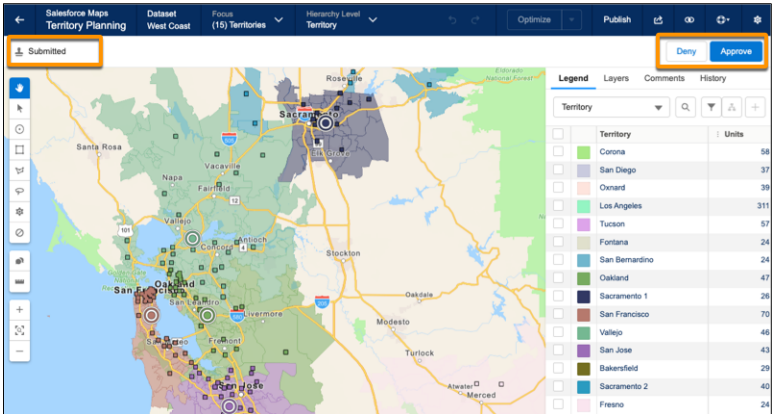
Approved for Publishing i

Search for users

Noella Seravat ✕

Felix Chambers ✕

When you submit your alignment for approval, reviewers receive requests according to the process you set up.



SEE ALSO:

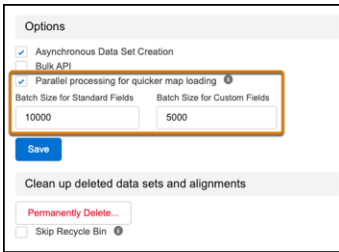
- [Salesforce Help: Approval Processes](#)
- [Salesforce Help: Set Up an Approval Process for Alignments \(can be outdated or unavailable during release preview\)](#)

Plan Large Territory Models in Less Time

Design territories without waiting for alignments with high data volumes to load on the map. Reduce loading times when you set up Salesforce Maps Territory Planning to process data in parallel.

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

How: To get started, go to Installed Packages in Setup and choose **Configure** next to Salesforce Maps.



Enable parallel processing from Territory Planning data management options. You can adjust batch sizes to decrease the number of fields according to your business needs.

Map New Boundaries

Discover the latest available boundaries that help you reach sales goals as you carve optimal 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.

Country	Boundary
Australia	Postal Code

Country	Boundary
Canada	Dissemination Area
	Forward Sortation Area
Germany	Postal Code
United Kingdom	Postal Sector
United States	3-Digit Postal Code
	Census Tract
	County
	Postal Code
	State

Other Improvements in Salesforce Maps Territory Planning

Stay informed about alignments that your team is working on by requesting access to view them. Indicate the units whose assignments you want to preserve in published alignments. And search for records to see their assignment details.

Where: These changes apply to Lightning Experience and Salesforce Classic in Professional, Enterprise, Unlimited, and Developer editions.

Why: Territory Planning users can now:

- Keep alignment reviews and approvals moving quickly when stakeholders request access with one click.
- Avoid the need for assigning territories to named accounts manually after publishing alignments to CSV files and Salesforce records. Published alignments now include a field that indicates each unit's locked status.
- Easily see the results of proposed assignment changes on particular records by searching for them instead of scrolling when viewing the Selection Details table.

Sales Cloud Einstein

Estimate the value your business will see from Einstein Forecasting with the updated Readiness Assessor.

IN THIS SECTION:

[Estimate Your Company's Return on Investment for Einstein Forecasting](#)

Einstein Forecasting uses data science and machine learning to predict how much your sales teams will sell at the end of a forecasting period. It analyzes your team's past opportunities to create a predictive model. With Einstein Forecasting, sales managers can predict sales figures in advance, so they know where to focus and possibly intervene before their sales teams miss their sales quota. The updated Sales Cloud Einstein Readiness Assessor can analyze your company's annual sales revenue and provide a return on investment (ROI) estimate for Einstein Forecasting. That way, you can see the value that Einstein Forecasting can bring to your business, before implementing it.

SEE ALSO:

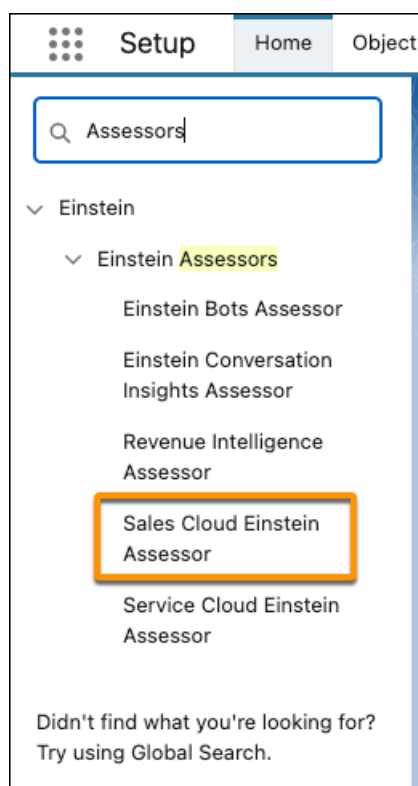
[Einstein Release Notes](#)

Estimate Your Company's Return on Investment for Einstein Forecasting

Einstein Forecasting uses data science and machine learning to predict how much your sales teams will sell at the end of a forecasting period. It analyzes your team's past opportunities to create a predictive model. With Einstein Forecasting, sales managers can predict sales figures in advance, so they know where to focus and possibly intervene before their sales teams miss their sales quota. The updated Sales Cloud Einstein Readiness Assessor can analyze your company's annual sales revenue and provide a return on investment (ROI) estimate for Einstein Forecasting. That way, you can see the value that Einstein Forecasting can bring to your business, before implementing it.

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

How: To get started, go to the Assessors page in Setup.



You can also go directly to the assessor and follow the instructions to let Salesforce access your data.

SEE ALSO:

[Salesforce Help: Run the Sales Cloud Einstein Readiness Assessor](#)

Other Changes in the Sales Cloud

Learn about other changes we've made to improve usability.

- The To Do List is now included in the Utility Bar by default. Users can now re-order items via drag and drop. The To Do List lets users view, sort, label, and act on all their tasks, including tasks from Sales Engagement cadences.

Salesforce CMS

Define how long Salesforce CDN stores CMS content for a channel. Assign the new content author role to CMS workspace contributors. In enhanced CMS workspaces, use CMS Workflows to route your content to workspace contributors for review and approval. View content version history and restore previous versions of published content. Find content more easily with smart searches.

IN THIS SECTION:

[Set a Cache Duration for CMS Content Served in Salesforce CDN Channels](#)

You have the flexibility to define how long the Salesforce CDN for Digital Experiences stores CMS content served in a channel. This change can help you optimize content delivery.

[Expand CMS Content Collaboration with the Content Author Role](#)

Content admins can assign the new content author role to workspace contributors. Content authors can create, edit, and view content in CMS and enhanced CMS workspaces. Publishing CMS content remains in the hands of content admins and content managers, giving you granular control over who can serve content to your channels.

[Approve Content and Create Workflows in Enhanced CMS Workspaces \(Beta\)](#)

Use CMS Workflows, available in enhanced CMS Workspaces, to create custom workflows directly from your CMS content items. Approvals, translation requests, and more are built into the content and available with a couple of clicks. Use the prebuilt CMS Basic Approval Workflow in Flow Orchestrator to get started.

[View and Restore Content Version History in Enhanced CMS Workspaces](#)

Get a point-in-time snapshot of previously published content versions. Comply with legal requirements or track changes to a content item. See who published and when, and restore a previously published version in a few clicks.

[Explore Your Enhanced CMS Workspace Content with Smarter Searches](#)

Find the content that you need with a more complete view of your Salesforce CMS content library. Enhanced CMS workspace searches now review all of the content items in the workspace, and they look for the search keywords in all of a content item's text fields. Previously, CMS searches reviewed content items only in the workspace folder where you initiated the search, and they returned only results that included the search keywords in their titles. With more comprehensive search capabilities, you can spend less time meticulously organizing and searching your CMS content, and more time curating content-rich experiences for your users.

[Publish Translation Variants and Related CMS Content in Enhanced CMS Workspaces](#)

When your CMS content is available in one or more translated languages, you can select which languages to publish. If your CMS content is related to another CMS content item, you can review and publish that content too. Publish your CMS content from enhanced CMS workspaces with confidence that your channels can serve a smooth user experience.

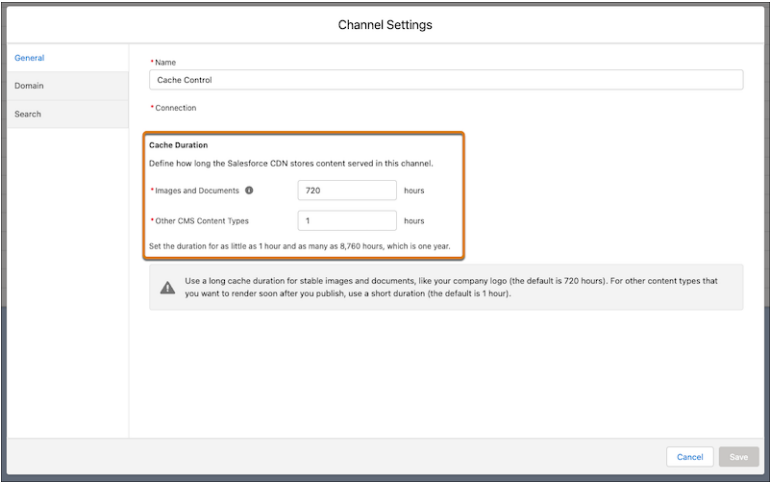
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Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions.

How: To configure the cache duration, open the channel settings, and then enter a value. Set the duration for as little as 1 hour and as many as 8,760 hours, which is 1 year. In a public channel or a site channel, use a long cache duration for images and documents that change infrequently, like your company logo. The default is 720 hours, which is 30 days. In a public channel, for other content types that change frequently and that you want to render soon after you publish, use a short duration. The default is 1 hour.

In a site channel, the default cache duration for other content types is 1 hour, and you can't change it.

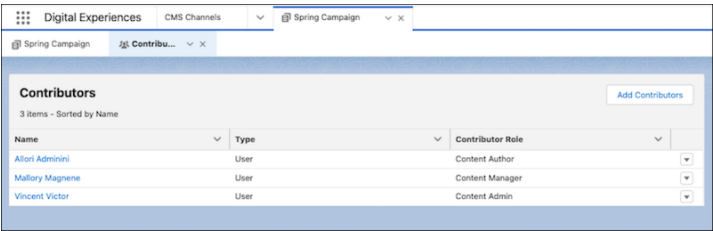


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Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions.

How: To add contributors or change roles in the Digital Experiences app, open a CMS or enhanced CMS workspace, then open the Contributors tab. Add a contributor and assign the content author role. To change a contributor’s role, use the row-level actions to change the role and select the content author role.



SEE ALSO:

[Approve Content and Create Workflows in Enhanced CMS Workspaces \(Beta\)](#)

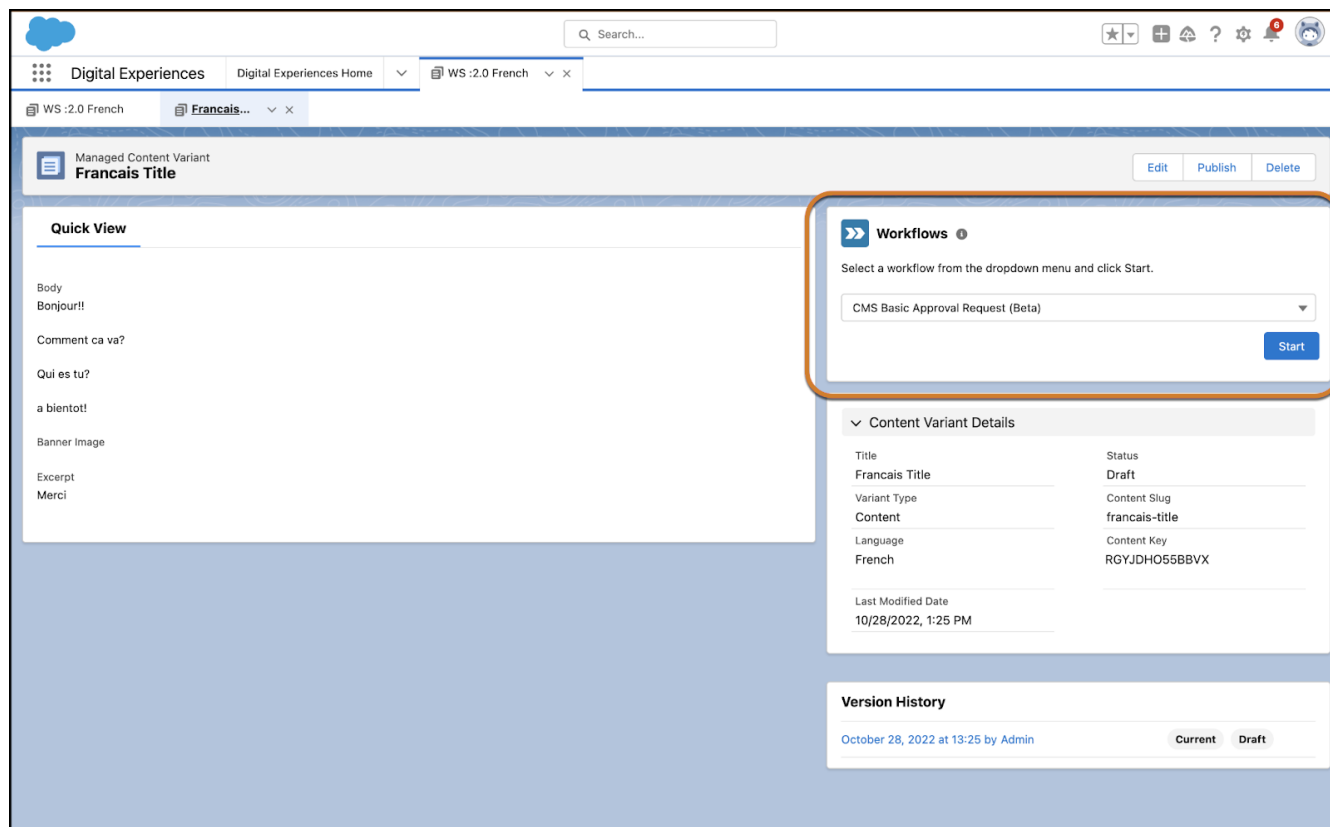
Approve Content and Create Workflows in Enhanced CMS Workspaces (Beta)

Use CMS Workflows, available in enhanced CMS Workspaces, to create custom workflows directly from your CMS content items. Approvals, translation requests, and more are built into the content and available with a couple of clicks. Use the prebuilt CMS Basic Approval Workflow in Flow Orchestrator to get started.

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](#).

Why: With workflows you can control access to content publication and send content for review and approval directly from the content detail page. Funnel approvals from your content creators to your content managers by using roles in Salesforce CMS. From within a workflow, you can specify reviewer and requester groups. With the new Content Author role, access is predefined and easily reusable.



How: From Setup, in the Quick Find box, enter *Digital Experiences*, and then click **Settings**. Under Workflows and Approvals in Enhanced CMS (Beta), select **Use workflows in CMS** and save your changes. After workflows are turned on, they appear on the content detail page of your CMS content items.

SEE ALSO:

[Expand CMS Content Collaboration with the Content Author Role](#)

View and Restore Content Version History in Enhanced CMS Workspaces

Get a point-in-time snapshot of previously published content versions. Comply with legal requirements or track changes to a content item. See who published and when, and restore a previously published version in a few clicks.

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

How: The content detail page on the Version History card lists your previously published versions. If a content update causes performance issues, you can revert to a previous version while you troubleshoot.



In the Version History card, your most recent content version is marked Current. Your content can have a status of Draft, Published, or Revised.

- Draft: Content that hasn't been published, or published content that has been unpublished
- Published: Content that's published and live on your site or other channels
- Revised: Published versions with new edits that haven't been republished

SEE ALSO:

[Salesforce Help: View Content History and Details in Salesforce CMS \(can be outdated or unavailable during release preview\)](#)

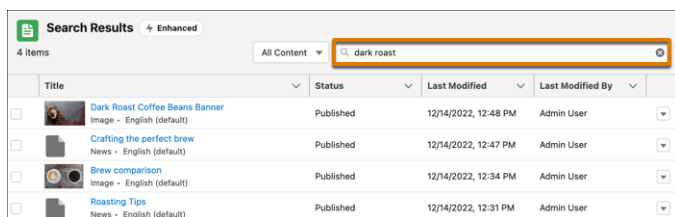
Explore Your Enhanced CMS Workspace Content with Smarter Searches

Find the content that you need with a more complete view of your Salesforce CMS content library. Enhanced CMS workspace searches now review all of the content items in the workspace, and they look for the search keywords in all of a content item's text fields. Previously, CMS searches reviewed content items only in the workspace folder where you initiated the search, and they returned only results that included the search keywords in their titles. With more comprehensive search capabilities, you can spend less time meticulously organizing and searching your CMS content, and more time curating content-rich experiences for your users.

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

[Connect REST API](#) supports enhanced CMS workspace searches.

How: Start a search from anywhere in your enhanced CMS workspace, and the Search Results page shows you matching content from any of the workspace's folders. Search results include matches for all text fields associated with each content item, such as alt text, body, and title.



SEE ALSO:

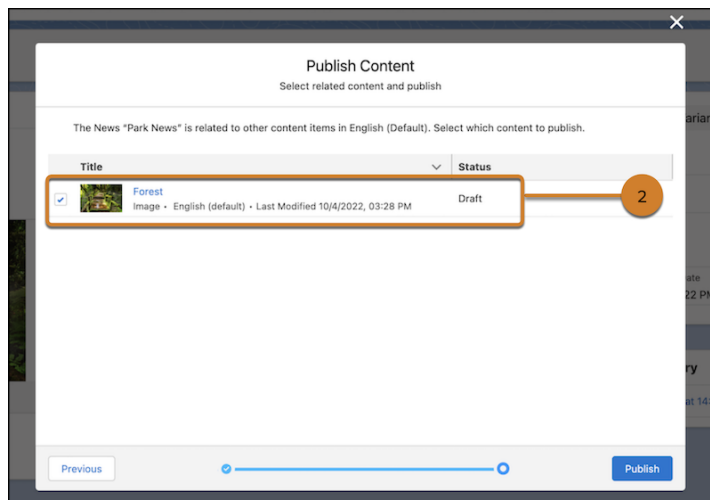
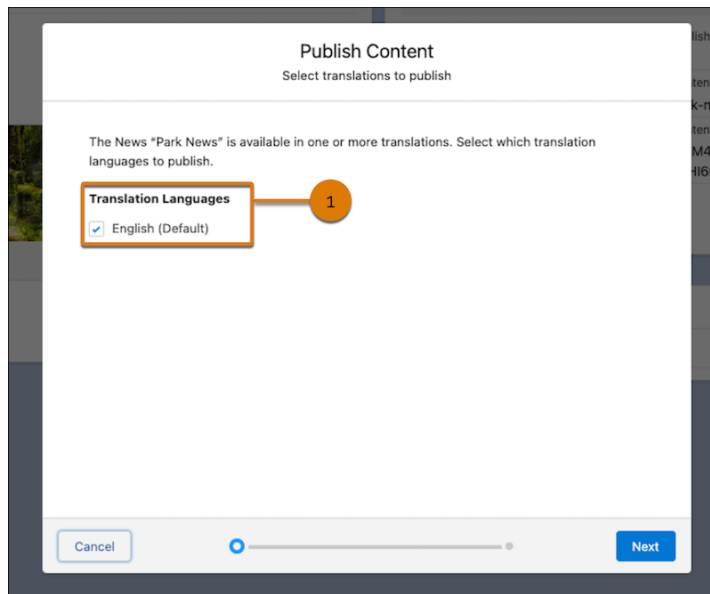
[Salesforce Help: Search for CMS Content in Enhanced Workspaces \(can be outdated or unavailable during release preview\)](#)

Publish Translation Variants and Related CMS Content in Enhanced CMS Workspaces

When your CMS content is available in one or more translated languages, you can select which languages to publish. If your CMS content is related to another CMS content item, you can review and publish that content too. Publish your CMS content from enhanced CMS workspaces with confidence that your channels can serve a smooth user experience.

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

Why: Now, you can see what other CMS content is related to a particular piece of content. For example, when you publish a news content item (1), you can choose to publish the related banner image, too (2).



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.

[Flow Builder](#)

Get external data into Flow Builder without code (beta). Use interactive components in flow screens (beta). Add lookup fields and multi-select picklists to flow screens. Convert processes into flows with the Migrate to Flow tool. Invoke a flow from a Slack message. Run screen flows from Slack (beta).

[Flow Orchestration](#)

Use advanced settings to make your orchestration a template so it can be used as a starting point for other orchestrations. You can now select Record-Triggered Orchestration from the Core tab in the New Flow window. Users can now complete assigned orchestration work items on their mobile devices.

[OmniStudio](#)

OmniStudio makes it easy to create consumer-grade, guided interactions that integrate into any industry-specific process. OmniStudio is available to select Industry Cloud customers.

Flow Integration

MuleSoft Composer for Salesforce is now Flow Integration. Flow Integration makes it easy to integrate data from any system with clicks, and invoke processes in any flow. When you create a secure process to connect the information stored in different systems, you build a real-time, integrated view of your customers and business.

Where: Flow Integration for Salesforce is available for an extra cost in Enterprise, Performance, and Unlimited editions that have enabled Lightning Experience.

For Composer release notes and help, see [MuleSoft Composer for Salesforce](#).

Flow Builder

Get external data into Flow Builder without code (beta). Use interactive components in flow screens (beta). Add lookup fields and multi-select picklists to flow screens. Convert processes into flows with the Migrate to Flow tool. Invoke a flow from a Slack message. Run screen flows from Slack (beta).

IN THIS SECTION:

[Flow Builder Updates](#)

Get external data from web-based services into flow builder (beta). Use interactive components in flow screens (beta). Add lookup fields and multi-select picklists to flow screens. View element descriptions on the flow canvas and flow element menu.

[Flow Runtime](#)

If you have flows that contain Pause elements and are launched by Process Builder processes, review and address changes made by the Make Paused Flow Interviews Resume in the Same Context release update. Use the Choice Lookup (beta) screen flow component to select a record from a predetermined list in a flow screen. Display a table of records on a flow screen with the Data Table flow screen component, which is now generally available. Versioned updates are available for flows and processes that are configured to run on API version 57.0.

[Flow and Process Management](#)

Continue your transition to Flow Builder with the Migrate to Flow tool, which can now convert processes to flows.

[Flow Extensions](#)

Use more flow screen components in Slack. Invoke a flow from a Slack message. Run a screen flow from a shortcut or button in Slack (beta). Use the Search for an Individual action to find people in a flow.

[Flow and Process Release Updates](#)

Salesforce Flow has several release updates that are scheduled to be enforced in future releases.

Flow Builder Updates

Get external data from web-based services into flow builder (beta). Use interactive components in flow screens (beta). Add lookup fields and multi-select picklists to flow screens. View element descriptions on the flow canvas and flow element menu.

IN THIS SECTION:

[Bring External Data into Flow Builder Without Code \(Beta\)](#)

Automate processes with external data by creating Flow Builder actions that call web-based service APIs using HTTP Callout. After you add the details of the API, Flow Builder generates a reusable callout action that you can use right away in Flow Builder and across Salesforce. Set up direct integrations as needed without code or a middleware service, such as Mulesoft.

[Build Screens with Reactive Components \(Beta\)](#)

Configure supported components or your custom Lightning Web Components to react to changes in other components on the same screen. Previously, components on the same screen couldn't talk to each other, so if you needed one component to influence another, you placed them on separate screens. Now you can build screens that feel like single-page applications and reduce the number of screens for your user. Reactivity is supported with API version 57.0 or later.

[Add Lookup Fields to Your Flow Screens with Ease](#)

Easily add Lookup fields to flow screens and create a record directly from the Lookup field with Dynamic Forms for Flow. On the Records tab, hover over a Lookup field from your record resource, and then drag in your desired Lookup field.

[Select Multiple Options in Dynamic Forms for Flow](#)

It's now easier and more straightforward for end users to select multiple options from a multi-select picklist field. On the Records tab, hover over a Multi-select Picklist field from your record resource, then drag the field into the screen editor.

[See Element Descriptions on the Flow Canvas](#)

Now you can easily see what each element is doing within a flow in Auto-Layout. Previously, to see the user-provided description, you opened the element.

[Get a Streamlined Flow Element Menu](#)

Now it's easier to find what you're looking for in the flow element menu in Auto-Layout with element descriptions in tooltips. Previously, element descriptions were listed under each element and often truncated due to lack of space. To see the full description, you hovered over the element.

Bring External Data into Flow Builder Without Code (Beta)

Automate processes with external data by creating Flow Builder actions that call web-based service APIs using HTTP Callout. After you add the details of the API, Flow Builder generates a reusable callout action that you can use right away in Flow Builder and across Salesforce. Set up direct integrations as needed without code or a middleware service, such as Mulesoft.

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



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

Who: To use HTTP Callout, admins must have the Manage Flow and Customize Applications permissions.

SEE ALSO:

[Trailblazer Community: Flow HTTP Callout \(Beta\)](#)

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

Build Screens with Reactive Components (Beta)

Configure supported components or your custom Lightning Web Components to react to changes in other components on the same screen. Previously, components on the same screen couldn't talk to each other, so if you needed one component to influence another, you placed them on separate screens. Now you can build screens that feel like single-page applications and reduce the number of screens for your user. Reactivity is supported with API version 57.0 or later.

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



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

How:

1. Opt into the Beta program from this setting in the Process Automation Settings page from Setup.
2. By checking "Opt in to Reactive Screens Beta," you agree that the Unified Pilot Research Agreement governs use of this Beta feature in this Org. [View Agreements](#)
3. Add the needed components to your screen.
4. Ensure that the output components have API names set.
5. In the other component, set the appropriate input to an output from the component you set previously. Save and run the flow as usual. Notice that the input component reacts to changes from the output component.

Add Lookup Fields to Your Flow Screens with Ease

Easily add Lookup fields to flow screens and create a record directly from the Lookup field with Dynamic Forms for Flow. On the Records tab, hover over a Lookup field from your record resource, and then drag in your desired Lookup field.

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

How: Previously, you had to set up lookup fields via the Lookup component. In addition, you can create a record right from the Lookup field within a Flow Screen. Previously, there was no way to do this from Lookup.

Select Multiple Options in Dynamic Forms for Flow

It’s now easier and more straightforward for end users to select multiple options from a multi-select picklist field. On the Records tab, hover over a Multi-select Picklist field from your record resource, then drag the field into the screen editor.

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

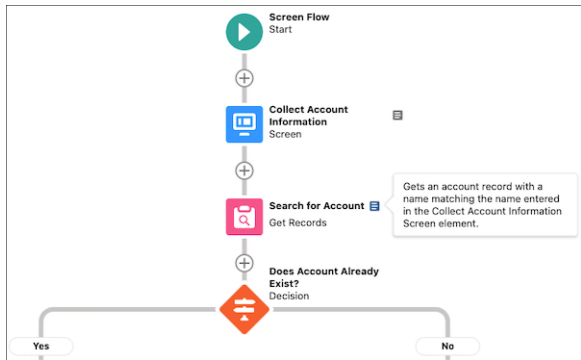
See Element Descriptions on the Flow Canvas

Now you can easily see what each element is doing within a flow in Auto-Layout. Previously, to see the user-provided description, you opened the element.

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

How: You can view an element’s user-provided description in three ways.

Method	Action
Mouse	Hover over ⓘ next to the element.
Arrow key	Move focus to ⓘ next to the element.
Keyboard shortcut	While on the element, press Ctrl+i (Windows) or Cmd+i (macOS).



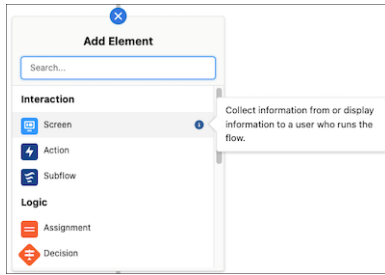
If an element doesn’t have a user-provided description, ⓘ doesn’t appear next to the element.

Get a Streamlined Flow Element Menu

Now it’s easier to find what you’re looking for in the flow element menu in Auto-Layout with element descriptions in tooltips. Previously, element descriptions were listed under each element and often truncated due to lack of space. To see the full description, you hovered over the element.

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

How: To view an element description, in an element menu, hover over the element. Then, hover over ⓘ. Alternatively, while on the element, press Ctrl+i (Windows) or Cmd+i (macOS).



Flow Runtime

If you have flows that contain Pause elements and are launched by Process Builder processes, review and address changes made by the Make Paused Flow Interviews Resume in the Same Context release update. Use the Choice Lookup (beta) screen flow component to select a record from a predetermined list in a flow screen. Display a table of records on a flow screen with the Data Table flow screen component, which is now generally available. Versioned updates are available for flows and processes that are configured to run on API version 57.0.

IN THIS SECTION:

[Resume Behavior Changed for Flows Launched by Process Builder Processes](#)

If you enabled the Make Paused Flow Interviews Resume in the Same Context release update, flows that are launched by Process Builder processes can resume in a different context. To resume those flows in system context without sharing, which is the behavior without the release update, configure the flows to run in API version 57.0 or later. Otherwise, process-launched flows resume in the context specified in the flow version properties.

[Select a Value from a List of Choices with the Choice Lookup Component \(Beta\)](#)

Prompt your users to search for and select an option from a set of choices on a flow screen. With the Choice Lookup (beta) flow screen component, your users can select from a list of external data values, picklist values, static values, or records that you filtered when you configured the flow. For example, rather than asking users to scroll through a long picklist to select a value, use the Choice Lookup (beta) component to enable users to search for values. The Choice Lookup (beta) component supports all choice resources, including collection choice sets and picklist choice sets.

[Select Multiple Records from a Table in a Flow Screen \(Generally Available\)](#)

Add the Data Table flow screen component to display a table of records on a flow screen. You can set the table to read only or let users select one or more records, and then use their selections later in the flow. This feature, which is now generally available, includes several enhancements since the last release. You can now preview the table in New Screen window as you configure it and display composite fields like Name and Address. Additionally, the configuration panel for the table is reorganized to make it more intuitive and accessible.

[Apex Static Variables Are Reset Within a Transaction Between Groups of Platform Event–Triggered Flow Interviews](#)

To better protect your data and users, Salesforce changed the behavior of Apex static variables that are set by Apex code invoked by platform event–triggered flows and processes. Typically, the value of a static variable persists within the context of a single transaction and is reset across transaction boundaries. Now Salesforce resets the values of those static variables within a single transaction between the execution of groups of flow interviews that run for different users. Flow interviews are the running instances of flows built in Flow Builder and processes built in Processes Builder.


[Flow and Process Run-Time Changes in API Version 57.0](#)

These updates affect only flows and processes that are configured to run on API version 57.0 or later.

Resume Behavior Changed for Flows Launched by Process Builder Processes

If you enabled the Make Paused Flow Interviews Resume in the Same Context release update, flows that are launched by Process Builder processes can resume in a different context. To resume those flows in system context without sharing, which is the behavior without the release update, configure the flows to run in API version 57.0 or later. Otherwise, process-launched flows resume in the context specified in the flow version properties.

Where: This change applies to Lightning Experience and Salesforce Classic in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions. This change applies to orgs that enabled this release update: Make Paused Flow Interviews Resume in the Same Context.

How: By default, flows created as of Spring '23 are configured to run in API version 57.0. To change the API version for running a flow, open it in Flow Builder, click , and show the advanced properties.

SEE ALSO:

[Make Paused Flow Interviews Resume in the Same Context \(Release Update\)](#)

[Flow and Process Run-Time Changes in API Version 57.0](#)

[Salesforce Help: Which Context Do Flows Run In? \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: API Version for Running a Flow \(can be outdated or unavailable during release preview\)](#)

Select a Value from a List of Choices with the Choice Lookup Component (Beta)

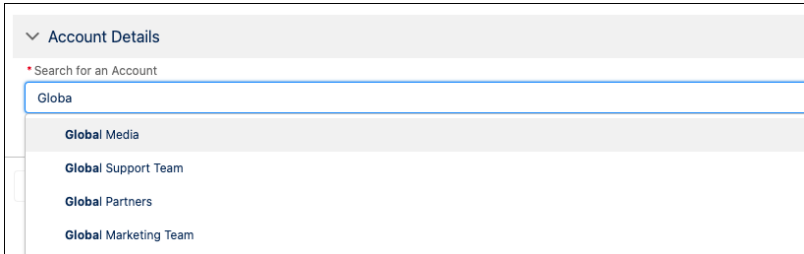
Prompt your users to search for and select an option from a set of choices on a flow screen. With the Choice Lookup (beta) flow screen component, your users can select from a list of external data values, picklist values, static values, or records that you filtered when you configured the flow. For example, rather than asking users to scroll through a long picklist to select a value, use the Choice Lookup (beta) component to enable users to search for values. The Choice Lookup (beta) component supports all choice resources, including collection choice sets and picklist choice sets.

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



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

How: Create a Choice resource such as collection choice set or record choice set to store the values to display in the component. Then, add the Choice Lookup (beta) screen component to your flow, and configure the fields. Specify the Choice resource that you created in the Choice field.



Select Multiple Records from a Table in a Flow Screen (Generally Available)

Add the Data Table flow screen component to display a table of records on a flow screen. You can set the table to read only or let users select one or more records, and then use their selections later in the flow. This feature, which is now generally available, includes several enhancements since the last release. You can now preview the table in New Screen window as you configure it and display composite fields like Name and Address. Additionally, the configuration panel for the table is reorganized to make it more intuitive and accessible.

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

How: Add the Data Table component to your screen flow and configure the fields.

Data Table			
<input type="checkbox"/> Account N...	<input type="checkbox"/> Billing City	<input type="checkbox"/> Created Date	<input type="checkbox"/> Account Type
<input checked="" type="checkbox"/> Acme	New York	Wed, Oct 27, 21, 07:21:59 PM	Prospect
<input type="checkbox"/> Global Media	Toronto	Wed, Oct 27, 21, 07:21:59 PM	Prospect
Pause		Finish	

Apex Static Variables Are Reset Within a Transaction Between Groups of Platform Event–Triggered Flow Interviews

To better protect your data and users, Salesforce changed the behavior of Apex static variables that are set by Apex code invoked by platform event–triggered flows and processes. Typically, the value of a static variable persists within the context of a single transaction and is reset across transaction boundaries. Now Salesforce resets the values of those static variables within a single transaction between the execution of groups of flow interviews that run for different users. Flow interviews are the running instances of flows built in Flow Builder and processes built in Processes Builder.

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

When: This update takes effect in Spring '23 after January 5, 2023.

Why: This update prevents one user's flow interviews from accessing values set by another user's flow interviews. A transaction can include flow interviews that were launched by platform event messages from multiple publishers. Those interviews are grouped by publisher, and then each group is executed sequentially within the transaction. Now Apex static variables are reset between each group of flow interviews.

How: We recommend that you check for Apex actions in your platform event–triggered flows and processes. Also check for Apex triggers that those flows and processes can invoke. If the invoked Apex code sets any static variables, make sure you don't depend on those static variable values to persist across the entire transaction when the transaction includes multiple users' flow interviews. For example, don't use those static variables to store a complete count of something across the transaction.

SEE ALSO:

[Apex Developer Guide: Static and Instance Methods, Variables, and Initialization Code](#)(can be outdated or unavailable during release preview)

[Platform Events Developer Guide: Subscribe to Platform Event Messages with Flows](#) (can be outdated or unavailable during release preview)

Flow and Process Run-Time Changes in API Version 57.0

These updates affect only flows and processes that are configured to run on API version 57.0 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.

Resume Autolaunched Flows with the Expected User Access and Context

This versioned update applies only if you enabled the **Make Paused Flow Interviews Resume in the Same Context** release update. User permission to run an autolaunched flow is now verified before an interview resumes. Also, when Process Builder processes launch flows that contain Pause elements, those interviews resume in system context without sharing.

In API version 56.0 and earlier, an autolaunched flow interview can resume even after the user loses access to the flow. Enabling the **Make Paused Flow Interviews Resume in the Same Context** release update also causes process-launched interviews to resume in the context specified in the flow version properties.

Use More Flow Elements

The limit of 2000 element executions per flow at runtime was removed. Other limits still apply. In API version 56.0 and earlier, flows could have a maximum of 2000 flow elements.

SEE ALSO:

[Salesforce Help: API Version for Running a Flow \(can be outdated or unavailable during release preview\)](#)

[Make Paused Flow Interviews Resume in the Same Context \(Release Update\)](#)

[Salesforce Help: Which Context Do Flows Run In? \(can be outdated or unavailable during release preview\)](#)

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

[Salesforce Help: Per-Transaction Flow Limits \(can be outdated or unavailable during release preview\)](#)

Flow and Process Management

Continue your transition to Flow Builder with the Migrate to Flow tool, which can now convert processes to flows.

IN THIS SECTION:

[Convert Processes to Flows with the Migrate to Flow Tool](#)

The updated Migrate to Flow tool can help your transition to Flow Builder. In addition to workflow rules, you can now use the Migrate to Flow tool to convert Process Builder processes into flows. Flows can do everything that processes can do and more.

Convert Processes to Flows with the Migrate to Flow Tool

The updated Migrate to Flow tool can help your transition to Flow Builder. In addition to workflow rules, you can now use the Migrate to Flow tool to convert Process Builder processes into flows. Flows can do everything that processes can do and more.

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

Why: The Migrate to Flow tool supports only record-triggered processes. Custom event and custom invocable type processes aren't supported. Processes containing scheduled actions, custom metadata types, and field traversals aren't supported. For supported processes, you can migrate these action types.

- Record update
- Record create
- Invoke flow
- Invoke Apex
- Email alert

How: From Setup, in the Quick Find box, enter *Migrate to Flow*, and then select **Migrate to Flow**. On the Migrate to Flow page, select the process that you want to convert into a flow, and then click **Migrate to Flow**. Then select which criteria that you want to migrate to the flow. After the process is migrated, you can test the flow in Flow Builder. Test the new flow, and if everything works as expected, activate the flow and deactivate the process you converted.

SEE ALSO:

[Salesforce Help: Considerations for Migrating a Process to a Flow \(can be outdated or unavailable during release preview\)](#)

Flow Extensions

Use more flow screen components in Slack. Invoke a flow from a Slack message. Run a screen flow from a shortcut or button in Slack (beta). Use the Search for an Individual action to find people in a flow.

IN THIS SECTION:

[Use Flow Screen Components with Flow in Slack \(Generally Available\)](#)

Screens in flows that run in Slack can contain the following flow screen components: Checkbox, CheckboxGroup, Currency, Date, Date & Time, Display Text, Long Text Area, Number, Picklist, Radio Button, and Text.

[Send a Screen Flow to Slack with an Action \(Generally Available\)](#)

Use the Slack Send Message to Launch Flow action to send a Slack message that contains a button that invokes a flow designed to run in Slack. This method of running a flow from Slack allows you to set input parameter values for flows with text variables available for input.

[Run Screen Flows from Slack \(Beta\)](#)

Run a screen flow without input parameters using shortcuts or a button in Slack. Use the Apex SDK for Slack (Beta) to define an app or a view in Slack that invokes a flow that has the Make available in Slack advanced setting selected. Build an app to provide users global shortcuts, message shortcuts, or slash commands that invoke flows from Slack. Build a custom view to run flows from buttons in Slack. With custom views you can use rich text and otherwise customize what your users see. You can't invoke a flow in Slack using an event.

[Search for an Individual in a Flow \(Beta\)](#)

With the new Search for an Individual action in Flow Builder, use the Salesforce Object Search Language (SOSL) to find and filter on contact, lead, or employee records.

Use Flow Screen Components with Flow in Slack (Generally Available)

Screens in flows that run in Slack can contain the following flow screen components: Checkbox, CheckboxGroup, Currency, Date, Date & Time, Display Text, Long Text Area, Number, Picklist, Radio Button, and Text.

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

How: In Flow Builder, build a screen flow that includes only screen components supported in Slack. When you save the flow, select the **Make Available in Slack** checkbox in the Advanced area of the Save the flow dialog box.

SEE ALSO:

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

[Salesforce Help: Create a Flow to Run in Slack \(can be outdated or unavailable during release preview\)](#)

Send a Screen Flow to Slack with an Action (Generally Available)

Use the Slack Send Message to Launch Flow action to send a Slack message that contains a button that invokes a flow designed to run in Slack. This method of running a flow from Slack allows you to set input parameter values for flows with text variables available for input.

Where: The Slack Send Message to Launch Flow 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.

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, select the **Make Available in Slack** checkbox in the Advanced area of the Save the flow dialog box. Finally, activate the flow.

Then, in a second flow, include the `slackSendMessageToLaunchFlow` *flowName* 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.

To run the flow from Slack, a user must be authenticated through the selected Salesforce Slack app. They must also have the Run Flows permission.

SEE ALSO:

[Salesforce Help: Send a Flow to Run in Slack \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Flow Core Actions: Send Message to Launch Flow \(can be outdated or unavailable during release preview\)](#)

Run Screen Flows from Slack (Beta)

Run a screen flow without input parameters using shortcuts or a button in Slack. Use the Apex SDK for Slack (Beta) to define an app or a view in Slack that invokes a flow that has the Make available in Slack advanced setting selected. Build an app to provide users global shortcuts, message shortcuts, or slash commands that invoke flows from Slack. Build a custom view to run flows from buttons in Slack. With custom views you can use rich text and otherwise customize what your users see. You can't invoke a flow in Slack using an event.

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](#).

SEE ALSO:

[Apex SDK for Slack \(Beta\): Define an App](#)

[Apex SDK for Slack \(Beta\): Define a View](#)

[Salesforce Help: Run a Screen Flow From a Button in a Slack View \(Beta\) \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Run a Screen Flow From a Slack Shortcut \(Beta\) \(can be outdated or unavailable during release preview\)](#)

Search for an Individual in a Flow (Beta)

With the new Search for an Individual action in Flow Builder, use the Salesforce Object Search Language (SOSL) to find and filter on contact, lead, or employee records.

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, add the Search for an Individual action to your flow.

Flow and Process Release Updates

Salesforce Flow has several release updates that are scheduled to be enforced in future releases.

IN THIS SECTION:

[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.

[Evaluate Criteria Based on Original Record Values in Process Builder \(Release Update\)](#)

This update fixes a bug with the evaluation criteria in processes that have multiple criteria and a record update. This release update ensures that a process with multiple criteria and a record update evaluates the original value of the field that began the process with a value of null. This update was first made available in Summer '19.

[Make Paused Flow Interviews Resume in the Same Context \(Release Update\)](#)

With this update enabled, paused autolaunched flows resume in the same context as when they were paused. Also, for each flow that runs in API version 57.0 or later, user permission to run the flow is verified before an interview resumes. If your Process Builder processes launch flows that contain Pause elements, we recommend configuring those flows to run in API version 57.0 or later. Otherwise, this update can change the context of resumed interviews. Instead of resuming in system context without sharing, the process-launched flows resume in the context specified in the flow version properties. 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. This update was first made available in Winter '23 and was scheduled to be enforced in Summer '23, but we postponed the enforcement date to Winter '24.

[Enforce Rollbacks for Custom Invocable Action Exceptions in REST API \(Release Update\)](#)

This update preserves data integrity by rolling back transactions that end in an exception. When you execute a custom invocable action defined in Apex using REST API, the API doesn't change Salesforce data if that exception occurs.

[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 this Knowledge Article: [Prepare for the "Disable Rules for Enforcing Explicit Access to Apex Classes" Release Update](#).

The preparation steps are recommended as security best practices. But they're not required, and enabling the Disable Rules for Enforcing Explicit Access to Apex Classes update doesn't impact existing implementations. For example, users' permission sets and profiles can continue to grant them explicit access to Apex classes.

To apply this update, from Setup, in the Quick Find box, enter *Release Updates*, and then select **Release Updates**. For Disable Rules for Enforcing Explicit Access to Apex Classes, follow the testing and activation steps.

SEE ALSO:

[Release Updates](#)

Evaluate Criteria Based on Original Record Values in Process Builder (Release Update)

This update fixes a bug with the evaluation criteria in processes that have multiple criteria and a record update. This release update ensures that a process with multiple criteria and a record update evaluates the original value of the field that began the process with a value of null. This update was first made available in Summer '19.

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

When: Salesforce enforces this update in Summer '25. 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 (Release Update)

With this update enabled, paused autolaunched flows resume in the same context as when they were paused. Also, for each flow that runs in API version 57.0 or later, user permission to run the flow is verified before an interview resumes. If your Process Builder processes launch flows that contain Pause elements, we recommend configuring those flows to run in API version 57.0 or later. Otherwise, this update can change the context of resumed interviews. Instead of resuming in system context without sharing, the process-launched flows resume in the context specified in the flow version properties. 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: 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 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, the flow resumes in the same context as when it was paused. Also, if the flow runs in API version 57.0 or later, user access to the flow is verified before resuming it.

For example, 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 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.

If the user loses access to the flow after the interview is paused, the interview fails to resume if the flow runs in API version 57.0 or later.

This update affects only autolaunched flows with Pause elements that are configured to resume at a specific time.

This update improves security in Salesforce by preventing you from unintentionally allowing users to create or edit records that they don't have access to.

For flows that run in API version 57.0 or later, the update prevents you from unintentionally allowing users to run flows that they no longer have access to.

How: With this update enabled, 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. For flows that run in API version 57.0 or later, avoid removing a user's access to the flows until the user's interviews finish.

With this update enabled, flows that are launched by Process Builder processes can resume in a different context. To continue to resume them in system context without sharing, configure the flows to run in API version 57.0 or later. Otherwise, process-launched flows resume in the context specified in the flow version properties.

With this update enabled, autolaunched flow interviews resume in the same context as when they were paused. Also, each interview running in API version 57.0 or later can resume only if the running user has access to the flow at the resume time.

To review 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, follow the testing and activation steps.

SEE ALSO:

[Release Updates](#)

[Salesforce Help: API Version for Running a Flow \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: How Does Flow Security Work? \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Which Context Do Flows Run In? \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Always Run in System Context \(can be outdated or unavailable during release preview\)](#)

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.

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. This update was first made available in Winter '23 and was scheduled to be enforced in Summer '23, but we postponed the enforcement date to Winter '24.

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

Enforce Rollbacks for Custom Invocable Action Exceptions in REST API (Release Update)

This update preserves data integrity by rolling back transactions that end in an exception. When you execute a custom invocable action defined in Apex using REST API, the API doesn't change Salesforce data if that exception occurs.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer 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 click the maintenance tab.

How: Before you apply this update, review your Apex-defined invocable actions and ensure that they don't generate exceptions when executed. 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

Use advanced settings to make your orchestration a template so it can be used as a starting point for other orchestrations. You can now select Record-Triggered Orchestration from the Core tab in the New Flow window. Users can now complete assigned orchestration work items on their mobile devices.

IN THIS SECTION:

[Use Advanced Settings for an Orchestration](#)

Exercise more control over the usage and execution of your orchestration with advanced settings. You can also turn your orchestration into a template and use it as a starting point for creating other orchestrations in Flow Builder.

[Create a Record-Triggered Orchestration on the Core Tab](#)

Want to create a record-triggered orchestration? Look no further than the Core tab in the New Flow window to get started.

[Go Mobile with Assigned Orchestration Work](#)

Users can now complete their assigned work in the Work Guide on their mobile devices. The Flow Orchestration Work Guide component in Lightning App Builder supports both the mobile web browser and the Salesforce mobile app. The Flow Orchestration Work Guide component in Experience Builder supports only the mobile web browser.

[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, along with 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.

[Other Changes to Flow Orchestration](#)

Learn about improvements to Flow Orchestration.

Use Advanced Settings for an Orchestration

Exercise more control over the usage and execution of your orchestration with advanced settings. You can also turn your orchestration into a template and use it as a starting point for creating other orchestrations in Flow Builder.

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

How: In Flow Builder, click **Save As**, and then click **Show Advanced**.

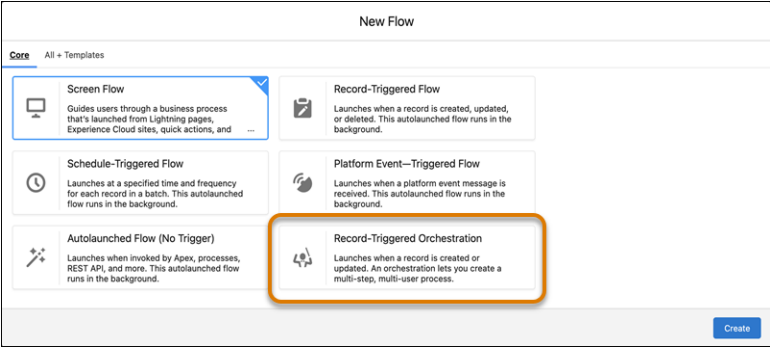
To access an orchestration's advanced settings, click  and select **Show Advanced**.

Create a Record-Triggered Orchestration on the Core Tab

Want to create a record-triggered orchestration? Look no further than the Core tab in the New Flow window to get started.

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

How: From Setup, select **Flows**, and click **New Flow**. Select **Record-Triggered Orchestration**, and click **Create**.



Go Mobile with Assigned Orchestration Work

Users can now complete their assigned work in the Work Guide on their mobile devices. The Flow Orchestration Work Guide component in Lightning App Builder supports both the mobile web browser and the Salesforce mobile app. The Flow Orchestration Work Guide component in Experience Builder supports only the mobile web browser.

Where: This change applies to Lightning Experience and the Salesforce mobile app for iOS and Android in Enterprise, Performance, Unlimited, and Developer editions.

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, along with 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.

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.

New Flow Orchestration Icons

Check out our new look!

Item	Icon
Record-Triggered Orchestration Orchestration Run	

Item	Icon
Orchestration Stage Run	
Orchestration Run Log	
Orchestration Work Item Flow Orchestration Work Guide	

Orchestration Run History Name Change

Orchestration Run History is now called Orchestration Run Log.

OmniStudio

OmniStudio makes it easy to create consumer-grade, guided interactions that integrate into any industry-specific process. 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](#).

IN THIS SECTION:

[OmniStudio Updates](#)

The Standard OmniStudio Runtime setting in OmniStudio Settings is now called Standard OmniStudio Content. Force a DataRaptor or an Integration Procedure to run in standard runtime from Apex when RollbackDRChanges or RollbackIPChanges is set to true. Style the container of a FlexCard's flyout action. Reduce the time to render a large list of records on a FlexCard. Use merge fields to create dynamic values for FlexCard input element attributes. Disable the Standard OmniStudio Content setting to use custom labels on a combobox in a FlexCard element. Override an OmniScript modal in standard runtime. Custom labels are now supported in preview on a Multi-Language OmniScript in standard runtime. The Confirm header title and Cancel button label in the edit block element now support custom labels. We've removed the "Licensing & Permitting" default OmniScript Type value because it's not valid with LWC OmniScripts. There's a known limitation on the OmniScript Edit Block element where adding 7 or more elements in table mode truncates columns. We've made accessibility enhancements for FlexCards and OmniScripts.

[OmniStudio Minor Release Updates](#)

This page provides details about OmniStudio updates made after the Spring '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 object model.

[OmniStudio for Vlocity Updates](#)

Style the container of a FlexCard's flyout action. Reduce the time to render a large list of records on a FlexCard. Use merge fields to create dynamic values for FlexCard input element attributes. Enable OmniScripts to use DocuSign forms with OAuth 2.0 by configuring authentication providers and adding named credentials. The Confirm header title and Cancel button label in the edit block element now support custom labels. We've removed the "Licensing & Permitting" default OmniScript Type value because it's not valid with LWC OmniScripts. There's a known limitation on the OmniScript Edit Block element where adding 7 or more elements in table mode truncates columns. OmniStudio customers migrating from custom to standard objects can test standard content directly in the designers. We've added a more detailed process for migrating your content from custom to standard objects. We've made accessibility enhancements for FlexCards and OmniScripts.

[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 both versions of OmniStudio.

OmniStudio Updates

The Standard OmniStudio Runtime setting in OmniStudio Settings is now called Standard OmniStudio Content. Force a DataRaptor or an Integration Procedure to run in standard runtime from Apex when RollbackDRChanges or RollbackIPChanges is set to true. Style the container of a FlexCard's flyout action. Reduce the time to render a large list of records on a FlexCard. Use merge fields to create dynamic values for FlexCard input element attributes. Disable the Standard OmniStudio Content setting to use custom labels on a combobox in a FlexCard element. Override an OmniScript modal in standard runtime. Custom labels are now supported in preview on a Multi-Language OmniScript in standard runtime. The Confirm header title and Cancel button label in the edit block element now support custom labels. We've removed the "Licensing & Permitting" default OmniScript Type value because it's not valid with LWC OmniScripts. There's a known limitation on the OmniScript Edit Block element where adding 7 or more elements in table mode truncates columns. We've made accessibility enhancements for FlexCards and OmniScripts.

Who: These release updates are for OmniStudio customers on the standard objects model. OmniStudio for Vlocity customers on the custom objects model, see [OmniStudio for Vlocity Updates](#).

IN THIS SECTION:

[Standard OmniStudio Runtime Setting Name Was Changed](#)

The Standard OmniStudio Runtime setting in OmniStudio Settings is now called Standard OmniStudio Content.

[OmniStudio FlexCards Updates](#)

Style the container of a FlexCard's flyout action. Reduce the time to render a large list of records on a FlexCard. Use merge fields to create dynamic values for FlexCard input element attributes. Disable the Standard OmniStudio Content setting to use custom labels on a combobox in a FlexCard element.

[OmniScripts Updates](#)

Override an OmniScript modal in standard runtime. Custom labels are now supported in preview on a Multi-Language OmniScript in standard runtime. The Confirm header title and Cancel button label in the edit block element now support custom labels. We've removed the "Licensing & Permitting" default OmniScript Type value because it's not valid with LWC OmniScripts. There's a known limitation on the OmniScript Edit Block element where adding 7 or more elements in table mode truncates columns.

[OmniStudio DataRaptors and Integration Procedures Updates](#)

Force a DataRaptor or an Integration Procedure to run in standard runtime from Apex by setting an Omni Interaction Configuration setting to `true`.

Standard OmniStudio Runtime Setting Name Was Changed

The Standard OmniStudio Runtime setting in OmniStudio Settings is now called Standard 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 OmniStudio customers on the standard objects model.

OmniStudio FlexCards Updates

Style the container of a FlexCard's flyout action. Reduce the time to render a large list of records on a FlexCard. Use merge fields to create dynamic values for FlexCard input element attributes. Disable the Standard OmniStudio Content setting to use custom labels on a combobox in a FlexCard element.

IN THIS SECTION:

[Style a FlexCard Flyout Container](#)

Add custom CSS to the HTML element that wraps a flyout.

[Append Data to a Record on a FlexCard](#)

Reduce the time to render a large list of records by using the Append Record action. Instead of using the Update Datasource action to update a record, which renders the whole card again, use the Append Record action to add additional data the end of the record.

[Create Dynamic Values for FlexCard Input Element Attributes](#)

Use merge fields to create dynamic values for the min, max, minLength, maxLength, and mask attributes on FlexCard Input elements.

[Disable Standard OmniStudio Content to Use Custom Labels on FlexCard Combobox](#)

To use custom labels on a multi-select FlexCard input element whose display mode is combobox, disable the Standard OmniStudio Content setting.

Style a FlexCard Flyout Container

Add custom CSS to the HTML element that wraps a flyout.

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 custom and standard object models.

How: In the Properties panel in the FlexCard Designer, add the name of a class in the **Flyout Container Class** property when a flyout action is selected.

Append Data to a Record on a FlexCard

Reduce the time to render a large list of records by using the Append Record action. Instead of using the Update Datasource action to update a record, which renders the whole card again, use the Append Record action to add additional data the end of the record.

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 custom and standard object models.

Why: When trying to render a large list of records, use the Append Record action when your record size exceeds 10 MB or is more than 140 records. This action increases your FlexCard's performance considerably. If you use the Update Datasource action to update a large list of records, it takes a considerable amount of time to render the whole card again.

How: Add an action to a FlexCard whose **Action Type** is *Card* and **Type** is *Append Record*. To add the new data directly to the records array, keep **Append Directly to Records** selected and enter the new data as a merge field in the **Value** field. To add the data to an existing JSON node, deselect **Append Directly to Records**. In the **Key** enter the name of an existing JSON node. In the **Value** input field, enter the new data as a merge field.



Example: Let's say you want to enable your customer service reps to view a list of contacts for each account on a FlexCard with multiple accounts listed. On your FlexCard is a list of Accounts. Each account has an action element with two actions. The first action is a data action that fetches the contacts and saves it to the JSON node `contacts`. The second action is the Append Record action.

In the Append Record Action, to add the new records directly to the records array, keep **Append Directly to Records** selected. In the **Value** field, enter `{contacts}` as the data fetched from the data action.

To save the new data to an existing JSON node, deselect **Append Directly to Records**. In the **Key** field, enter the name of a node that exists in your data JSON, such as `contactslist`. In the **Value** field, enter `{contacts}` as the data fetched from the data action.

Create Dynamic Values for FlexCard Input Element Attributes

Use merge fields to create dynamic values for the min, max, minLength, maxLength, and mask attributes on FlexCard Input elements.

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 custom and standard object models.

How: For example, to create a dynamic value for the mask attribute of a telephone element, create a **Custom Attribute**. Enter *mask* as the **Attribute** name, and select a merge field (a data field variable) as its **Value**, such as *{PhoneMask}*.

Disable Standard OmniStudio Content to Use Custom Labels on FlexCard Combobox

To use custom labels on a multi-select FlexCard input element whose display mode is combobox, disable the Standard OmniStudio Content setting.

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: In OmniStudio Settings, if Standard OmniStudio Content is enabled, disable it.

OmniScripts Updates

Override an OmniScript modal in standard runtime. Custom labels are now supported in preview on a Multi-Language OmniScript in standard runtime. The Confirm header title and Cancel button label in the edit block element now support custom labels. We've removed the "Licensing & Permitting" default OmniScript Type value because it's not valid with LWC OmniScripts. There's a known limitation on the OmniScript Edit Block element where adding 7 or more elements in table mode truncates columns.

IN THIS SECTION:

[Override the OmniScript Modal in Standard Runtime](#)

Override the OmniScript modal LWC in standard runtime. Previously, you could only override the OmniScript modal LWC in the package runtime.

[Licensing & Permitting OmniScript Type Was Removed](#)

The "Licensing & Permitting" default OmniScript Type value was removed because it's not valid with LWC OmniScripts.

[OmniScript Has a Known Limitation on the Edit Block Element](#)

There's a known limitation on the OmniScript edit block element. When adding 7 or more elements in an edit block in table mode, the columns are truncated and the table doesn't occupy the full length of its container.

[OmniScript Edit Block Confirm Title and Cancel Button Support Custom Labels](#)

The Confirm header title and Cancel button label in the edit block element now support custom labels.

[Multi-Language OmniScript in Standard Runtime Support Custom Labels](#)

Custom labels are now supported in preview on a Multi-Language OmniScript.

Override the OmniScript Modal in Standard Runtime

Override the OmniScript modal LWC in standard runtime. Previously, you could only override the OmniScript modal LWC in the package runtime.

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: Use these code samples to override the OmniScript modal LWC in standard runtime.

```
//customModal.html
<template>
  <div class={_modalContainerClass}
    style="display:none">
    <section role="dialog"
      tabindex="-1"
      aria-modal="true"
      aria-describedby="modal-content"
      class={_modalClasses}>
      <div class={_modalContentContainerClass}
        style="height: 80vh">
        <template if:false={hideHeader}>
          <header class={_headerClasses}>
            <slot name="header">
            </slot>
          </header>
        </template>

        <div class={_contentClasses} style="border: 1px solid green">
          <slot name="content"
            id="modal-content"
            aria-live="assertive">
          </slot>
        </div>

        <template if:false={hideFooter}>
          <footer class={_footerClasses}>
            <slot name="footer">
            </slot>
          </footer>
        </template>
      </div>
    </section>
    <div class="slds-backdrop slds-backdrop_open"></div>
  </div>
</template>
```

```
//customModal.js
import OmniscriptModal from 'c/omniscriptModal';
import tmpl from './customModal.html';

export default class customModal extends OmniscriptModal {
  render() {
    return tmpl;
  }
  renderedCallback() {
    try {
      super.renderedCallback();
    }
    catch (e) {
```

```

    }
}
disconnectedCallback() {
    try {
        super.disconnectedCallback();
    }
    catch (e) {
    }
}
}
}

```

```

//customModal.js-meta.xml
<?xml version="1.0" encoding="UTF-8"?>
<LightningComponentBundle xmlns="http://soap.sforce.com/2006/04/metadata" fqn="omniscript">

    <apiVersion>56.0</apiVersion>
    <isExposed>true</isExposed>
    <masterLabel>Custom Modal</masterLabel>
</LightningComponentBundle>

```

SEE ALSO:

[Extend and Override an OmniScript Modal Lightning Web Component](#)

Licensing & Permitting OmniScript Type Was Removed

The "Licensing & Permitting" default OmniScript Type value was removed because it's not valid with LWC OmniScripts.

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 custom and standard object models.

OmniScript Has a Known Limitation on the Edit Block Element

There's a known limitation on the OmniScript edit block element. When adding 7 or more elements in an edit block in table mode, the columns are truncated and the table doesn't occupy the full length of its container.

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 custom and standard object models.

OmniScript Edit Block Confirm Title and Cancel Button Support Custom Labels

The Confirm header title and Cancel button label in the edit block element now support custom labels.

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 custom and standard object models.

Multi-Language OmniScript in Standard Runtime Support Custom Labels

Custom labels are now supported in preview on a Multi-Language OmniScript.

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.

OmniStudio DataRaptors and Integration Procedures Updates

Force a DataRaptor or an Integration Procedure to run in standard runtime from Apex by setting an Omni Interaction Configuration setting to `true`.

IN THIS SECTION:

[Call a DataRaptor from Apex to Run in Core](#)

Force a DataRaptor to run in standard runtime from Apex if the Omni Interaction Configuration setting `RollbackDRChanges` is set to `true`.

[Call an Integration from Apex to Run in Core](#)

Force an Integration Procedure to run in standard runtime from Apex if the Omni Interaction Configuration setting `RollbackIPChanges` is set to `true`.

Call a DataRaptor from Apex to Run in Core

Force a DataRaptor to run in standard runtime from Apex if the Omni Interaction Configuration setting `RollbackDRChanges` is set to `true`.

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 Industries customers with a custom managed package whose orgs have an OmniStudio Permission Set License (PSL) and who are granted the necessary permissions to access OmniStudio standard objects.

Why: Previously, if the Omni Interaction Configuration setting `RollbackDRChanges` in your managed package was set to `true`, no existing `DRGlobal` Apex method could call the DataRaptor in standard runtime. The Apex method `processStandardRuntime` forces the DataRaptor to run in standard runtime.

How: To execute DataRaptors in standard runtime, call the DataRaptor from Apex using the `DRGlobal` class method `processStandardRuntime`. This code provides an example.

```
/* Specify DataRaptor Name */
String DRName = 'DRExtractAccount';
/* Populate the input JSON */
Map<String, Object> myInputData = new Map<String, Object>{'BillingState'=>'CA'};
/* Call the DataRaptor */
omnistudio.DRProcessResult result = vlocity_ins.DRGlobal.processStandardRuntime(myInputData,
    DRName);
/* Deserialize the DataRaptor output for processing in Apex */
List<Map<String, Object>> myExtractResult = (List<Map<String, Object>>)result.toJsonList();
```

SEE ALSO:

[DataRaptor Calls From Apex](#)

Call an Integration from Apex to Run in Core

Force an Integration Procedure to run in standard runtime from Apex if the Omni Interaction Configuration setting `RollbackIPChanges` is set to `true`.

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 Industries customers with a custom managed package whose orgs have an OmniStudio Permission Set License (PSL) and who are granted the necessary permissions to access OmniStudio standard objects.

Why: Previously, if the Omni Interaction Configuration setting `RollbackIPChanges` in your managed package was set to `true`, you couldn't run an Integration Procedure in standard runtime. To force an Integration Procedure to use the standard runtime, add `useStandardRuntime = true` in the API request header.

How: Specify `useStandardRuntime = true` in the API request header by adding it as a **Remote Option** on an Integration Procedure Action or directly in your Apex class. This code provides an example.



Example:

```
/* Initialize variables */
String procedureName = 'Type_SubType';
Map<String, Object> ipInput = new Map<String, Object> ();
Map<String, Object> ipOutput = new Map<String, Object> ();
Map<String, Object> option = new Map<String, Object> ();

/* Populating input map for an Integration Procedure*/
option.put('useStandardRuntime',true);

/* Call the IP via runIntegrationService, and save the output to ipOutput */
ipOutput = (Map<String, Object>)
omnistudio.IntegrationProcedureService.runIntegrationService(procedureName, ipInput,
option);

System.debug('IP Output: ' + ipOutput);
```

SEE ALSO:

[Integration Procedure Actions](#)

[Integration Procedure Invocation from Apex](#)

OmniStudio Minor Release Updates

This page provides details about OmniStudio updates made after the Spring '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 object model.

[OmniStudio Spring '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 Updates

Style the container of a FlexCard's flyout action. Reduce the time to render a large list of records on a FlexCard. Use merge fields to create dynamic values for FlexCard input element attributes. Enable OmniScripts to use DocuSign forms with OAuth 2.0 by configuring authentication providers and adding named credentials. The Confirm header title and Cancel button label in the edit block element now support custom labels. We've removed the "Licensing & Permitting" default OmniScript Type value because it's not valid with LWC OmniScripts. There's a known limitation on the OmniScript Edit Block element where adding 7 or more elements in table mode truncates columns. OmniStudio customers migrating from custom to standard objects can test standard content directly in the designers. We've added a more detailed process for migrating your content from custom to standard objects. We've made accessibility enhancements for FlexCards and OmniScripts.

Who: These release updates are for OmniStudio customers on the custom objects model. OmniStudio customers on the standard objects model, see [OmniStudio Updates](#).

IN THIS SECTION:

[OmniStudio for Vlocity FlexCards Updates](#)

Style the container of a FlexCard's flyout action. Reduce the time to render a large list of records on a FlexCard. Use merge fields to create dynamic values for FlexCard input element attributes.

[OmniStudio for Vlocity OmniScripts Updates](#)

Enable OmniScripts to use DocuSign forms with OAuth 2.0 by configuring authentication providers and adding named credentials. The Confirm header title and Cancel button label in the edit block element now support custom labels. We've removed the "Licensing & Permitting" default OmniScript Type value because it's not valid with LWC OmniScripts. There's a known limitation on the OmniScript Edit Block element where adding 7 or more elements in table mode truncates columns.

[OmniStudio Migration Tool Updates](#)

OmniStudio for Vlocity customers migrating from custom to standard objects can test standard content directly in the designers. To enable the designers in your managed package to use the standard runtime after migration, execute anonymous Apex. You can migrate your content with a new, more detailed process.

OmniStudio for Vlocity FlexCards Updates

Style the container of a FlexCard's flyout action. Reduce the time to render a large list of records on a FlexCard. Use merge fields to create dynamic values for FlexCard input element attributes.

IN THIS SECTION:

[Create Dynamic Values for FlexCard Input Element Attributes](#)

Use merge fields to create dynamic values for the min, max, minLength, maxLength, and mask attributes on FlexCard Input elements.

[Style a FlexCard Flyout Container](#)

Add custom CSS to the HTML element that wraps a flyout.

[Append Data to a Record on a FlexCard](#)

Reduce the time to render a large list of records by using the Append Record action. Instead of using the Update Datasource action to update a record, which renders the whole card again, use the Append Record action to add additional data the end of the record.

Create Dynamic Values for FlexCard Input Element Attributes

Use merge fields to create dynamic values for the min, max, minLength, maxLength, and mask attributes on FlexCard Input elements.

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 custom and standard object models.

How: For example, to create a dynamic value for the mask attribute of a telephone element, create a **Custom Attribute**. Enter *mask* as the **Attribute** name, and select a merge field (a data field variable) as its **Value**, such as *{PhoneMask}*.

Style a FlexCard Flyout Container

Add custom CSS to the HTML element that wraps a flyout.

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 custom and standard object models.

How: In the Properties panel in the FlexCard Designer, add the name of a class in the **Flyout Container Class** property when a flyout action is selected.

Append Data to a Record on a FlexCard

Reduce the time to render a large list of records by using the Append Record action. Instead of using the Update Datasource action to update a record, which renders the whole card again, use the Append Record action to add additional data the end of the record.

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 custom and standard object models.

Why: When trying to render a large list of records, use the Append Record action when your record size exceeds 10 MB or is more than 140 records. This action increases your FlexCard's performance considerably. If you use the Update Datasource action to update a large list of records, it takes a considerable amount of time to render the whole card again.

How: Add an action to a FlexCard whose **Action Type** is *Card* and **Type** is *Append Record*. To add the new data directly to the records array, keep **Append Directly to Records** selected and enter the new data as a merge field in the **Value** field. To add the data to an existing JSON node, deselect **Append Directly to Records**. In the **Key** enter the name of an existing JSON node. In the **Value** input field, enter the new data as a merge field.



Example: Let's say you want to enable your customer service reps to view a list of contacts for each account on a FlexCard with multiple accounts listed. On your FlexCard is a list of Accounts. Each account has an action element with two actions. The first action is a data action that fetches the contacts and saves it to the JSON node *contacts*. The second action is the Append Record action.

In the Append Record Action, to add the new records directly to the records array, keep **Append Directly to Records** selected. In the **Value** field, enter *{contacts}* as the data fetched from the data action.

To save the new data to an existing JSON node, deselect **Append Directly to Records**. In the **Key** field, enter the name of a node that exists in your data JSON, such as *contactsList*. In the **Value** field, enter *{contacts}* as the data fetched from the data action.

OmniStudio for Vlocity OmniScripts Updates

Enable OmniScripts to use DocuSign forms with OAuth 2.0 by configuring authentication providers and adding named credentials. The Confirm header title and Cancel button label in the edit block element now support custom labels. We've removed the "Licensing & Permitting" default OmniScript Type value because it's not valid with LWC OmniScripts. There's a known limitation on the OmniScript Edit Block element where adding 7 or more elements in table mode truncates columns.

IN THIS SECTION:[Licensing & Permitting OmniScript Type Was Removed](#)

The "Licensing & Permitting" default OmniScript Type value was removed because it's not valid with LWC OmniScripts.

[OmniScript Has a Known Limitation on the Edit Block Element](#)

There's a known limitation on the OmniScript edit block element. When adding 7 or more elements in an edit block in table mode, the columns are truncated and the table doesn't occupy the full length of its container.

[OmniScript Edit Block Confirm Title and Cancel Button Support Custom Labels](#)

The Confirm header title and Cancel button label in the edit block element now support custom labels.

[OmniScript Supports DocuSign OAuth 2 Support](#)

Enable OmniScripts to use DocuSign forms with OAuth 2.0 by configuring authentication providers and adding named credentials.

Licensing & Permitting OmniScript Type Was Removed

The "Licensing & Permitting" default OmniScript Type value was removed because it's not valid with LWC OmniScripts.

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Who: For OmniStudio customers on the custom and standard object models.

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The Confirm header title and Cancel button label in the edit block element now support custom labels.

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 custom and standard object models.

OmniScript Supports DocuSign OAuth 2 Support

Enable OmniScripts to use DocuSign forms with OAuth 2.0 by configuring authentication providers and adding named credentials.

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 custom object model who upgrades to Winter '23 (beginning with 240.11) and Spring '23 packages.

Why: Beginning October 20, 2022, DocuSign requires new and existing REST API integrations to use OAuth 2.0 authentication. OAuth 2.0 is required for all DocuSign services.

How: With this update, OmniStudio for Vlocity no longer supports the previous method of authenticating to DocuSign. Any previous integrations with DocuSign break. To transition to OAuth 2.0 authentication, add authentication provider credentials for DocuSign in Salesforce to create a secure connection. Add OAuth 2.0 Named Credentials using auth provider information. Log in to your DocuSign

Account with the named credential. To send or sign DocuSign on behalf of another user, update the User object with the new field, **DocuSignNamedCredentialSOBO**.

OmniStudo Migration Tool Updates

OmniStudio for Vlocity customers migrating from custom to standard objects can test standard content directly in the designers. To enable the designers in your managed package to use the standard runtime after migration, execute anonymous Apex. You can migrate your content with a new, more detailed process.

IN THIS SECTION:

Test Standard Content in the Designers After Migration

After migrating your custom objects to standard objects in your sandbox, to test your standard content in the designers, your managed package must switch to using the standard data model in the designers.

OmniStudio Migration Tool Docs Are Updated

The OmniStudio Migration Tool documentation has more details on how to migrate your custom objects to standard objects. Learn what you must know before you migrate and how to prepare for migration. Learn the proper strategy to deploy sandboxes to assist in the migration. Learn new details about testing your standard content from the designers in sandboxes, which includes disabling the custom (package) runtime before finally pushing metadata to production.

Test Standard Content in the Designers After Migration


After migrating your custom objects to standard objects in your sandbox, to test your standard content in the designers, your managed package must switch to using the standard data model in the designers.

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 custom objects model wanting to migrate to standard objects.

Why: The OmniStudio designers can only use either standard or custom runtime. After executing the anonymous apex, your managed package looks for standard objects content only. Switching from custom to standard data model disables all custom packaged OmniStudio content in your org.

How: With the Winter '23 or later package installed, execute the anonymous Apex in the Salesforce Developer Console of your migration sandbox org.

 **Warning:** Do not run the anonymous Apex in production. Run the code in your migration sandbox only. Running the code turns off the custom data model, which would break all existing custom content in your production org.

Executing the anonymous Apex adds two Omni Interaction Config records to your migration sandbox: `InstalledIndustryPackage` and `TheFirstInstalledOmniPackage`. With these records, your managed standard content can be modified in the designers.

Omni Interact

Feature Settings

Omni Interaction

Omni Interaction Access Configuration

Omni Interaction Configuration

OmniStudio Settings

Didn't find what you're looking for? Try using Global Search.

Omni Interaction Configuration

All

View: All Create New View

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

New Omni Interaction Configuration

Action	Name	Value
Edit Del	InstalledIndustryPackage	vlocity_cmt
Edit Del	TheFirstInstalledOmniPackage	vlocity_cmt

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

OmniStudio Migration Tool Docs Are Updated

The OmniStudio Migration Tool documentation has more details on how to migrate your custom objects to standard objects. Learn what you must know before you migrate and how to prepare for migration. Learn the proper strategy to deploy sandboxes to assist in the migration. Learn new details about testing your standard content from the designers in sandboxes, which includes disabling the custom (package) runtime before finally pushing metadata to production.

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 custom objects model wanting to migrate to standard objects.

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 both versions of OmniStudio.

Download the PDF for all OmniStudio and OmniStudio for Vlocity release notes published before October 14, 2022 here: [OmniStudio Release Notes](#).

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](#).

Salesforce Starter

Salesforce Starter is the most efficient way to get started with Salesforce. With combined sales, service, and marketing tools, Salesforce Starter helps you find, win, and retain customers, all within one app. Salesforce Starter is simple and scalable, making it ideal if you're new to Salesforce or customer relationship management (CRM).

Learn about the latest features and enhancements in [Salesforce Starter Release Notes](#).

Security, Identity, and Privacy

Boost your security and compliance gains more conveniently. Enhanced Domains are deployed, and the first phase of multi-factor authentication (MFA) auto-enablement begins. Get more information-rich audit logs and monitoring solutions for file events and insecure login flows. Experience Cloud users can log in to third-party apps and reset passwords right from your sites. Enjoy more Security Center data visualization options with CRM Analytics. And use Privacy Center to extend consent preference options to customer subscription communications.

IN THIS SECTION:

[Backup and Restore](#)

Version 1.123 has improved in-app messaging to help you assign the right object permissions for backup and restore actions.

[Domains](#)

Enhanced domains are deployed for you unless you postpone that automatic deployment. And you can monitor more My Domain settings in Setup Audit Trail.

Identity and Access Management

The first phase of multi-factor authentication (MFA) auto-enablement is in effect. Salesforce offers more capabilities for SAML single sign-on and certificate-based authentication methods. Manage insecure login flows and consumer secrets with greater visibility and security. Provide your Experience Cloud users with a streamlined and branded identity experience. Log in to Salesforce Easy orgs with an email address, and if you have access to more than one Salesforce Easy org, use the Environment Switcher dashboard to select which org to log in to.

Health Check

Identify whether you have any at-risk security settings for external URL redirection with a new Health Check setting.

Privacy Center

Use the Preference Manager features that you already know and love to gather user preferences for subscription communications. Take customization a step further by choosing how selectable channel type options appear on your forms.

Salesforce Shield

Extend your security and monitoring reach with more Shield functionality. Encrypt more Financial Services Cloud data. Expanded event data includes more log data about exceptions and the new File Event (beta). You can also opt into or out of generating event log files (release update).

Security Center

Execute CRM Analytics features on Security Center Data. Easily analyze charts within the Configuration metric category with new and improved data labels.

Data Mask

Use Data Mask to obfuscate sensitive information in your sandbox so that data isn't replicated in a readable or recognizable way in another environment. Faster job processing times and improvements to unique field masking are headed your way.

Other Security Changes

Increase the security of your named credentials with new configurations. To guard against attacks, content sniffing protection is enforced, and we recommend that you review your clickjack protection settings.

Backup and Restore

Version 1.123 has improved in-app messaging to help you assign the right object permissions for backup and restore actions.

IN THIS SECTION:

Identify Required Object Access Permissions Faster

Version 1.123 of the Backup and Restore managed package adds transparent in-app guidance when you don't have the required object-level permissions. Now you can see which permissions you need for specific backup and restore tasks before you start, saving you time.

Get Ready for Backup and Restore Service Updates

To provide better service at scale and to support product improvements, Backup and Restore is migrating to a new architecture. Look for an email with information about your timelines. After the migration is complete, data backups made before the migration are available in .CSV format. Backups made after migration are available for restoration as normal entirely within the Backup and Restore app.

Identify Required Object Access Permissions Faster

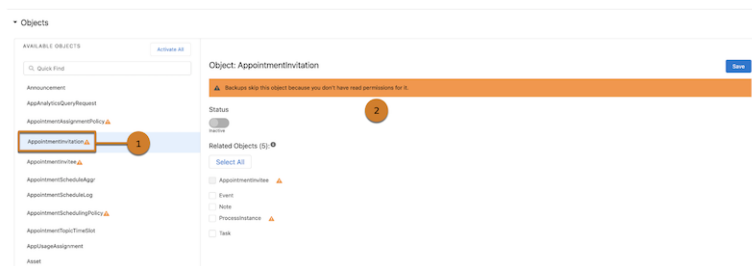
Version 1.123 of the Backup and Restore managed package adds transparent in-app guidance when you don't have the required object-level permissions. Now you can see which permissions you need for specific backup and restore tasks before you start, saving you time.

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

Who: This change applies to users who already installed the Backup and Restore managed package.

Why: Object permissions form the basis of a secure Salesforce implementation. When a Salesforce admin issues read, create, edit, and delete permissions to specific users or profiles, the Backup and Restore app respects those permissions. Backup and restore actions are tied to the user who schedules or initiates them.

How: In Backup and Restore app, navigate to a new or existing policy. A yellow triangle indicates the objects that you have partial access to (1). Click or hover over the object. A message appears with tips about which actions are inaccessible and the permissions those actions require (2). As always, you can't see objects that you don't have any permissions for. For a full list of required permissions, see Salesforce Help.



SEE ALSO:

[Salesforce Help: Create a Backup Policy](#)

[Salesforce Help: Restore Data from a Backup](#)

Get Ready for Backup and Restore Service Updates

To provide better service at scale and to support product improvements, Backup and Restore is migrating to a new architecture. Look for an email with information about your timelines. After the migration is complete, data backups made before the migration are available in .CSV format. Backups made after migration are available for restoration as normal entirely within the Backup and Restore app.

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

When: This change is available beginning in May 2023. You receive an email with dates that apply to you.

How: If you need access to backups that were made before migration, contact Salesforce Customer Support and request a .CSV copy of your data. You can then restore it with Data Loader if necessary.

Backups made before the migration are available for one year. To request extended storage timelines, contact Salesforce Customer Support.

Domains

Enhanced domains are deployed for you unless you postpone that automatic deployment. And you can monitor more My Domain settings in Setup Audit Trail.

IN THIS SECTION:

[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 the URLs that Salesforce hosts for your org. Consistent domain formats improve the user experience and standardize URLs for use in custom code and API calls. Also, with enhanced domains, your users can access Salesforce from browsers that block third-party cookies. Because this update affects application and login 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.

[Review the Milestones for Enhanced Domains Deployment and Enforcement](#)

Enhanced domains are the latest version of My Domain that meets security and browser standards. This high-impact feature is still deployed for you in Spring '23, but now you can postpone that automatic deployment to Summer '23. You can disable enhanced domains until they're enforced in Winter '24. To confirm the timing for a specific org, visit the My Domain Setup page.

[Test Enhanced Domains with Service Cloud Voice](#)

If you use Service Cloud Voice with Partner Telephony, work with your telephony provider to make the required updates. Otherwise, Salesforce updates your Service Cloud Voice configuration when you deploy enhanced domains.

[Monitor More My Domain Settings](#)

With new events in the Setup Audit Trail, you can track when an admin saves a change to your My Domain details, cancels a provisioned My Domain change, or removes a previous My Domain. The audit trail also captures when a user enables Salesforce Edge Network. When an admin deploys a new My Domain, the audit trail includes the new My Domain name and whether enhanced domains are enabled. Also, several existing events related to other My Domain settings are updated for clarity.

[Use Partitioned Domains in Hyperforce](#)

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 org in the Salesforce deployment schedule for that org type, enable and deploy partitioned domains.

[Allow Partitioned Domains for Demo Orgs](#)

Partitioned domains allow Salesforce to maximize the availability of your orgs by gradually rolling out delivery changes. With partitioned domains, your My Domain hostnames include a word related to the org type. To ensure uninterrupted access to all your orgs, update your allowlists, network configuration, and firewall settings to allow all partitioned domain formats.

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 the URLs that Salesforce hosts for your org. Consistent domain formats improve the user experience and standardize URLs for use in custom code and API calls. Also, with enhanced domains, your users can access Salesforce from browsers that block third-party cookies. Because this update affects application and login 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.

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

When: Salesforce deploys enhanced domains in Spring '23. You can postpone that automatic deployment via a My Domain option. In Summer '23, Salesforce deploys enhanced domains in orgs without the feature deployed. You can disable this feature until Salesforce enforces this update in Winter '24. 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.

How: Before you update production, we recommend testing all My Domain changes in a sandbox. A message on the My Domain Setup page indicates whether enhanced domains are scheduled to be automatically deployed in Spring '23. In that case, admins also 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 until Summer '23, disable a My Domain setting before the org gets Spring '23. In the Routing section of the My Domain Setup 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.

SEE ALSO:

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

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

[Salesforce Help: Plan for a My Domain Change \(can be outdated or unavailable during release preview\)](#)

[Trailblazer Community Group: My Domain and Enhanced Domains](#)

[Release Updates](#)

Review the Milestones for Enhanced Domains Deployment and Enforcement

Enhanced domains are the latest version of My Domain that meets security and browser standards. This high-impact feature is still deployed for you in Spring '23, but now you can postpone that automatic deployment to Summer '23. You can disable enhanced domains until they're enforced in Winter '24. To confirm the timing for a specific org, visit the My Domain Setup page.

Where: Enhanced domains are available in Lightning Experience and Salesforce Classic in Group, Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

Why: If enhanced domains aren't deployed, the My Domain Setup page includes an informational message about when the feature is deployed.

My Domain Settings [Help for this Page](#)

My Domain showcases your company's brand and keeps your data more secure. The domains that Salesforce hosts for your org include your company-specific My Domain name.

Enhanced domains are automatically deployed in this org with Spring '23.

My Domain Details [Edit](#)

Current My Domain URL	mycompany.my.salesforce.com without enhanced domains
My Domain Name	mycompany
Domain Suffix	Standard (*.my.salesforce.com)
	<input type="checkbox"/> Use enhanced domains i
URL Stabilization	If enhanced domains are enabled, URLs are stabilized and these settings have no effect.
	<input checked="" type="checkbox"/> Stabilize Visualforce, Experience Builder, Site.com Studio, and content file URLs i
	<input checked="" type="checkbox"/> Include the instance name in Visualforce URLs when third-party cookies are blocked i

[Edit](#)

SEE ALSO:

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

[Deploy Enhanced Domains \(Release Update\)](#)

Test Enhanced Domains with Service Cloud Voice

If you use Service Cloud Voice with Partner Telephony, work with your telephony provider to make the required updates. Otherwise, Salesforce updates your Service Cloud Voice configuration when you deploy enhanced domains.

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

SEE ALSO:

[Update Service Cloud Voice After a My Domain Change](#)

Monitor More My Domain Settings

With new events in the Setup Audit Trail, you can track when an admin saves a change to your My Domain details, cancels a provisioned My Domain change, or removes a previous My Domain. The audit trail also captures when a user enables Salesforce Edge Network. When an admin deploys a new My Domain, the audit trail includes the new My Domain name and whether enhanced domains are enabled. Also, several existing events related to other My Domain settings are updated for clarity.

Where: This change applies to Lightning Experience and Salesforce Classic in Contact Manager, Group, Essentials, Professional, Enterprise, Performance, Unlimited, Developer, and Database.com editions.

Why: Here's an example of the Setup Audit Trail with some new and updated events for changes to My Domain settings.

View Setup Audit Trail [Help for this Page](#)

The last 20 entries for your organization are listed below. You can [download](#) your organization's setup audit trail for the last six months (Excel .csv file).

Date	User	Source Namespace Prefix	Action	Section	Delegate User
11/21/2022, 12:32:10 PM PST	wanda.yu@mycompany.com		Removed the previous My Domain, mybrand.my.salesforce.com without enhanced domains	My Domain	
11/21/2022, 12:31:45 PM PST	wanda.yu@mycompany.com		Disabled Log redirections for My Domain hostnames	My Domain	
11/21/2022, 12:31:44 PM PST	wanda.yu@mycompany.com		Disabled Redirect previous My Domain URLs	My Domain	
11/21/2022, 12:30:06 PM PST	wanda.yu@mycompany.com		Enabled Log redirections for My Domain hostnames	My Domain	
11/21/2022, 12:28:47 PM PST	wanda.yu@mycompany.com		Created Certificate SelfSignedCert_21Nov2022_202846	Certificate and Key Management	
11/21/2022, 12:28:31 PM PST	wanda.yu@mycompany.com		Deployed a My Domain change with My Domain login URL mynewbrand.my.salesforce.com with enhanced domains	My Domain	
11/21/2022, 12:22:14 PM PST	wanda.yu@mycompany.com		Saved a change to My Domain details that started the provisioning process for mynewbrand.my.salesforce.com with enhanced domains. This change takes effect after the new My Domain is deployed.	My Domain	
11/21/2022, 9:15:30 AM PST	wanda.yu@mycompany.com		Canceled a provisioned My Domain change with My Domain login URL mynewbrand.my.salesforce.com without enhanced domains	My Domain	
11/21/2022, 9:11:31 AM PST	wanda.yu@mycompany.com		Saved a change to My Domain details that started the provisioning process for mynewbrand.my.salesforce.com without enhanced domains. This change takes effect after the new My Domain is deployed.	My Domain	
11/21/2022, 9:00:29 AM PST	wanda.yu@mycompany.com		Enabled Salesforce Edge Network	My Domain	
11/21/2022, 9:00:08 AM PST	wanda.yu@mycompany.com		Disabled the My Domain option, Automatically deploy enhanced domains with Spring '23	My Domain	
11/20/2022, 12:37:51 PM PST	wanda.yu@mycompany.com		Changed the My Domain Login policy from Redirect with a warning to the same page within the domain to Don't redirect (recommended)	My Domain	

SEE ALSO:

[Salesforce Help: Monitor Setup Changes with Setup Audit Trail \(can be outdated or unavailable during release preview\)](#)

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

Use Partitioned Domains in Hyperforce

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 org in the Salesforce deployment schedule for that org type, enable and deploy 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. Partitioned domains are newly available in Hyperforce orgs on a USA instance. Only the sandbox partition is available in other Hyperforce orgs, in Public Cloud, and in orgs on Salesforce Edge Network.

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. Salesforce plans to make partitioned domains available in additional Hyperforce orgs with enhanced domains before Summer '23. For updates about the availability of this feature, join the [My Domain and Enhanced Domains](#) group in the Trailblazer Community.

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.

My Domain Details [Save] [Cancel]

Current My Domain URL: **mycompany-dev-ed.my.salesforce.com** with enhanced domains

Before changing your My Domain details, review My Domain Considerations in Salesforce Help.

If you change your My Domain name or suffix, you must deploy your new My Domain.

My Domain Name: [Check Availability]

Domain Suffix: ▼

☒ Use enhanced domains ⓘ

Domain Partitioning ☒ Use partitioned domains

Your chosen new My Domain URL: **mycompany-dev-ed.develop.my.salesforce.com** with partitioned enhanced domains

[Save] [Cancel]

SEE ALSO:

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

Allow Partitioned Domains for Demo Orgs

Partitioned domains allow Salesforce to maximize the availability of your orgs by gradually rolling out delivery changes. With partitioned domains, your My Domain hostnames include a word related to the org type. To ensure uninterrupted access to all your orgs, update your allowlists, network configuration, and firewall settings to allow all partitioned domain formats.

Where: This change applies to Lightning Experience and Salesforce Classic in Group, Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions. New Developer Edition orgs, patch orgs, scratch orgs, and Trailhead Playgrounds get partitioned domains by default. This feature is newly available in qualifying demo orgs with enhanced domains.

When: Salesforce plans to make partitioned domains available in demo orgs with enhanced domains before Summer '23. For updates about the availability of this feature, join the [My Domain and Enhanced Domains](#) group in the Trailblazer Community.

SEE ALSO:

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

[Salesforce Help: Partitioned Domains for Demo Orgs \(can be outdated or unavailable during release preview\)](#)

Identity and Access Management

The first phase of multi-factor authentication (MFA) auto-enablement is in effect. Salesforce offers more capabilities for SAML single sign-on and certificate-based authentication methods. Manage insecure login flows and consumer secrets with greater visibility and security. Provide your Experience Cloud users with a streamlined and branded identity experience. Log in to Salesforce Easy orgs with an email address, and if you have access to more than one Salesforce Easy org, use the Environment Switcher dashboard to select which org to log in to.

IN THIS SECTION:

[MFA Auto-Enablement: Find Out When and How Your Org Is Affected \(Release Update\)](#)

As of February 1, 2022, Salesforce requires all customers to use multi-factor authentication (MFA) when accessing Salesforce products. To help customers meet this requirement, Salesforce is automatically enabling MFA for production orgs in several phases via the MFA Auto-Enablement Release Update. For orgs in the first phase, MFA is auto-enabled with Spring '23. For orgs in the second phase, MFA is auto-enabled with Summer '23.

[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.

[Check the Revocation Status of User Authentication Certificates](#)

Enhance the security of certificate-based logins to Salesforce by checking the revocation status of user certificates. This setting prevents logins with certificates that are revoked or can't be validated. Before you enable revocation status checks, make sure that your uploaded user certificates contain Online Certificate Status Protocol (OCSP) or Certificate Revocation List (CRL) endpoints.

[Insert Consumer Secrets in Authentication Providers Manually in All Change Sets and Packages](#)

Beginning in November 2022, if a change set or package includes an authentication provider with a consumer secret defined, the consumer secret is changed to a placeholder value. You must insert the consumer secret manually after deployment. Beginning with the Spring '23 release, this change applies to all change sets and packages, including those generated before November 2022. When you import an authentication provider, the consumer secret is treated as a plaintext value, even if the value was encrypted when the authentication provider was created.

[Monitor Connected App Logins That Use Insecure Flows](#)

In Login History, view logins into connected apps that use user-agent or username-password login flows. With new OAuth Flow Enhancements, you can monitor use of these insecure flows to determine the impact of blocking them.

[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.

[Take Charge of Your Identity Experiences with Headless Login and Forgot Password Flows](#)

Get ready to create identity experiences that are convenient for your customers and partners and consistent with your brand. With new Headless Identity APIs for Login and Forgot Password, you can control the user experience in a third-party app while relying on Salesforce for authentication. Your users log in, access their data, and manage their passwords without leaving your app. Behind the scenes, your Salesforce implementation uses authentication APIs called via an Experience Cloud site to handle authenticating users, authorizing data access, and resetting passwords.

[Simplify Login to Salesforce Easy with Welcome.salesforce.com and the Environment Switcher](#)

Log in to Salesforce Easy by using an email address on welcome.salesforce.com. You can use the Environment Switcher dashboard to select the org that you want to open if you can access multiple Salesforce Easy orgs via a single email address.

[Other Changes in the Salesforce Authenticator Mobile App](#)

The Salesforce Authenticator mobile app has new device and version requirements.

MFA Auto-Enablement: Find Out When and How Your Org Is Affected (Release Update)

As of February 1, 2022, Salesforce requires all customers to use multi-factor authentication (MFA) when accessing Salesforce products. To help customers meet this requirement, Salesforce is automatically enabling MFA for production orgs in several phases via the MFA Auto-Enablement Release Update. For orgs in the first phase, MFA is auto-enabled with Spring '23. For orgs in the second phase, MFA is auto-enabled with Summer '23.

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

When: To know when your production org is affected, monitor the Release Update node in Setup for the MFA Auto-Enablement Release Update.

- **Phase 1 orgs:** The release update for this phase was made available in Winter '23 and goes into effect with 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. Note that the MFA release update usually takes effect at the time your org is updated to Spring '23, but in some cases there could be a delay of several hours to a few days before MFA is auto-enabled for your users.
- **Phase 2 orgs:** If you see the release update after Spring '23 finishes rolling out, your org is scheduled to be auto-enabled with Summer '23. In rare cases, it can take several weeks for the update to appear after the Spring '23 release is complete.
- For orgs not included in phase 1 or 2, the release update will be available in a later release.

How: The release update automatically turns on this setting: Require multi-factor authentication (MFA) for all direct UI logins to your Salesforce org. 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 whether your org has exempt user types that need to be manually excluded from MFA before MFA auto-enablement occurs. 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.

If your users aren't prepared to start using MFA when Salesforce auto-enables it, you have two options.

- Your users can skip MFA registration for 30 days and can log in as usual. This grace period begins on the day the org is auto-enabled, and the same 30-day window applies to all users in the org. For example, if a user logs in five days after their org was auto-enabled, 25 days remain before they're required to register for MFA.
- In the unlikely event that users experience issues with MFA, you can temporarily disable it. But keep in mind that when your org reaches the MFA enforcement milestone in the future, Salesforce will re-enable MFA and the option to disable it will be removed.
 1. From Setup, in the Quick Find box, enter *Identity*, and then select **Identity Verification**.
 2. Deselect **Require multi-factor authentication (MFA) for all direct UI logins to your Salesforce org**.
 3. Save your changes.

SEE ALSO:

[Be Ready for MFA: Auto-Enablement Starts with Spring '23](#)

[Knowledge Article: Everything You Need to Know About MFA Auto-Enablement and Enforcement \(for Products Built on the Salesforce Platform\)](#)

[Knowledge Article: Salesforce MFA FAQ](#)

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 \(can be outdated or unavailable during release preview\)](#)

[Knowledge Article: Salesforce MFA FAQ](#)

Check the Revocation Status of User Authentication Certificates

Enhance the security of certificate-based logins to Salesforce by checking the revocation status of user certificates. This setting prevents logins with certificates that are revoked or can't be validated. Before you enable revocation status checks, make sure that your uploaded user certificates contain Online Certificate Status Protocol (OCSP) or Certificate Revocation List (CRL) endpoints.

SEE ALSO:

[Salesforce Help: Validate the Revocation Status of User Authentication Certificates \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Review Certificate Login Errors \(can be outdated or unavailable during release preview\)](#)

Insert Consumer Secrets in Authentication Providers Manually in All Change Sets and Packages

Beginning in November 2022, if a change set or package includes an authentication provider with a consumer secret defined, the consumer secret is changed to a placeholder value. You must insert the consumer secret manually after deployment. Beginning with the Spring '23 release, this change applies to all change sets and packages, including those generated before November 2022. When you import an authentication provider, the consumer secret is treated as a plaintext value, even if the value was encrypted when the authentication provider was created.

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

Monitor Connected App Logins That Use Insecure Flows

In Login History, view logins into connected apps that use user-agent or username-password login flows. With new OAuth Flow Enhancements, you can monitor use of these insecure flows to determine the impact of blocking them.

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

Why: You can block user-agent and username-password login flows so that developers can't use them to build new integrations. Blocking these flows is likely to break mobile applications, including those developed by Salesforce such as the Salesforce mobile app and the Field Service mobile app. Blocking is also likely to break managed packages. To avoid disruptions, monitor logins to see which apps use these flows.

How: From Setup, in the Quick Find box, enter *Login History*, and then click **Login History**. Click **Create New View**.

To restrict the new view to show only login subtype data, under Step 2: Specify Filter Criteria, select **Login Subtype** and **equals**, then click  and select the login subtype values to include.

Step 2. Specify Filter Criteria

Filter By Additional Fields (Optional):

Field	Operator	Value
Login Subtype	equals	
--None--	--None--	
--None--	--None--	
--None--	--None--	
--None--	--None--	

[Add Filter Logic...](#)

Lookup
Select the picklist values to add below.

[Deselect all](#) [Insert Selected](#)

Value
<input type="checkbox"/> UI Username-Password
<input type="checkbox"/> OAuth Username-Password
<input type="checkbox"/> OAuth User-Agent
<input type="checkbox"/> OAuth User-Agent for Hybrid Apps
<input type="checkbox"/> OAuth User-Agent with ID Token

To display the Login Subtype column in the new view, under Step 3: Select Fields to Display, add the **Login Subtype** field. Finish creating the Login History view, and then save.

SETUP Login History

[Add Filter Logic...](#)

Step 3. Select Fields to Display

Available Fields		Selected Fields
TLS Protocol	Add Remove	Username
TLS Cipher Suite		Login Time
Country Code		Source IP
Country		Location
Subdivision		Login Type
City		Status
PostalCode		Browser
Latitude		Platform
Longitude		Application
Authentication Method Reference		Client Version
Login Subtype		API Type
		API Version
		Login URL
		HTTP Method

Top
Up
Down
Bottom

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.

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

When: This update was first made available in Summer '22 and is enforced 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.

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](#)

Take Charge of Your Identity Experiences with Headless Login and Forgot Password Flows

Get ready to create identity experiences that are convenient for your customers and partners and consistent with your brand. With new Headless Identity APIs for Login and Forgot Password, you can control the user experience in a third-party app while relying on Salesforce for authentication. Your users log in, access their data, and manage their passwords without leaving your app. Behind the scenes, your Salesforce implementation uses authentication APIs called via an Experience Cloud site to handle authenticating users, authorizing data access, and resetting passwords.

Where: This change applies to LWR, Aura, and Visualforce sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Unlimited, and Developer editions.

How: Set up a headless login process with the Authorization Code and Credentials Flow, which is built on top of the OAuth 2.0 Authorization Code grant type. To complete your implementation, make it easy for users to reset their passwords with the Headless Forgot Password Flow.

SEE ALSO:

[Salesforce Help: Headless Identity APIs for Customers and Partners \(can be outdated or unavailable during release preview\)](#)

Simplify Login to Salesforce Easy with Welcome.salesforce.com and the Environment Switcher

Log in to Salesforce Easy by using an email address on welcome.salesforce.com. You can use the Environment Switcher dashboard to select the org that you want to open if you can access multiple Salesforce Easy orgs via a single email address.

Where: This change applies to Lightning Experience in Salesforce Easy.

When: This update was first made available to certain Salesforce Easy users on January 26, 2023.

Who: This update was initially available to a small number of Salesforce Easy users. More Salesforce Easy users will be added.

SEE ALSO:

[Salesforce Help: Log In with Your Email Address \(can be outdated or unavailable during release preview\)](#)

Other Changes in the Salesforce Authenticator Mobile App

The Salesforce Authenticator mobile app has new device and version requirements.

Review the new mobile OS and app version requirements for Salesforce Authenticator.

- iOS: The Salesforce Authenticator mobile app is no longer supported on iOS 11 or below. iPhone users with an unsupported iOS version can continue using the app without interruptions, but they can't update the app to the current version. For the best performance, we recommend running Salesforce Authenticator on iOS versions 13.4 or above.
- Android: The Salesforce Authenticator mobile app is no longer supported on Android 7 or below. Mobile users with an unsupported Android version can continue using the app without interruptions, but they can't reinstall the app on their device or update the app to the current version. For the best performance, we recommend running Salesforce Authenticator on Android versions 8 or above.
- Salesforce Authenticator App Versions: Salesforce no longer provides customer support for Salesforce Authenticator app versions below 3.7.2. Users running an unsupported version can continue using the app without interruptions. For the best experience, including feature enhancements and customer support, we recommend always running the latest version. Users can update the app in the Apple App Store (iOS) or Google Play (Android).

SEE ALSO:

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

Health Check

Identify whether you have any at-risk security settings for external URL redirection with a new Health Check setting.

IN THIS SECTION:

[Evaluate URL Redirection Setting in Health Check](#)

To monitor your security posture, view whether the Allow redirections to untrusted external URLs without warning setting is enabled in Health Check.

Evaluate URL Redirection Setting in Health Check

To monitor your security posture, view whether the Allow redirections to untrusted external URLs without warning setting is enabled in Health Check.

Where: This change applies to Enterprise, Performance, Unlimited, and Developer editions.

How: From Setup, in the Quick Find box, enter *Health Check*, and scroll to Informational Security Settings. Then view the Allow redirections to untrusted external URLs without warning setting status.

The screenshot shows the Salesforce Setup interface. On the left is a sidebar with navigation links. The main content area displays the 'Session Timeout' setting at the top, followed by a section titled 'Informational Security Settings (4)'. Within this section, a table lists various security settings. The first row, 'Allow redirections to untrusted external URLs without warning', is highlighted with a red border and a red 'Critical' label. The other rows are 'Key Size', 'Certificate Expiration', and 'Require permission to view record names in lookup fields'.

STATUS	SETTING	GROUP	YOUR VALUE	STANDARD VALUE	ACTIONS
Critical	Allow redirections to untrusted external URLs without warning	Session Settings	Enabled	Disabled	Edit
Compliant	Key Size	Certificate and Key Management	No certificate created	4096	Edit
Compliant	Certificate Expiration	Certificate and Key Management	No certificate created	179 days	Edit
Compliant	Require permission to view record names in lookup fields	User PII Settings	Enabled	Enabled	Edit

SEE ALSO:

[Salesforce Help: Manage Redirects to External URLs \(can be outdated or unavailable during release preview\)](#)

Privacy Center

Use the Preference Manager features that you already know and love to gather user preferences for subscription communications. Take customization a step further by choosing how selectable channel type options appear on your forms.

IN THIS SECTION:

[Create Preference Forms for Subscriptions](#)

Preference Manager has a new template type, Communication Subscriptions. Choose your brands and subscription info to include in the consent template, then use that template to create a preference form.

[Customize Channel Type Selections on Preference Forms](#)

In the Preference Builder Properties panel, choose from four format options for how end users select channel types.

Create Preference Forms for Subscriptions

Preference Manager has a new template type, Communication Subscriptions. Choose your brands and subscription info to include in the consent template, then use that template to create a preference form.

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 Consent Templates, click **New Template**. Select the Communication Subscription template type, and follow the prompts to create the template. Activate the template, then use it to create a new preference form.

SEE ALSO:

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

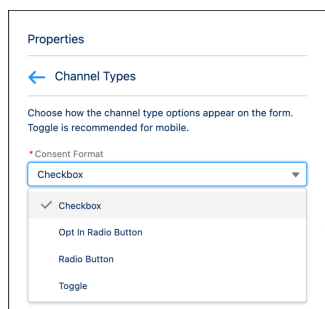
Customize Channel Type Selections on Preference Forms

In the Preference Builder Properties panel, choose from four format options for how end users select channel types.

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 form in Preference Builder. In the Properties panel, go to the Channel Types section. From the dropdown list, select an option to determine how the channel type options appear on the form.



Properties

← Channel Types

Choose how the channel type options appear on the form.
Toggle is recommended for mobile.

* Consent Format

Checkbox

✓ Checkbox

Opt in Radio Button

Radio Button

Toggle

SEE ALSO:

[Salesforce Help: Customize Template-Based Forms in Preference Builder \(can be outdated or unavailable during release preview\)](#)

Salesforce Shield

Extend your security and monitoring reach with more Shield functionality. Encrypt more Financial Services Cloud data. Expanded event data includes more log data about exceptions and the new File Event (beta). You can also opt into or out of generating event log files (release update).

IN THIS SECTION:

[Event Monitoring](#)

Opt in or out of generating and receiving event log files. Track file events such as user downloads with real-time notifications (beta). Get more information about SOAP API exceptions and Apex Unexpected Exception events. When you append new data to Event Monitoring Analytics app datasets (beta), data now uploads more efficiently.

[Shield Platform Encryption](#)

Add an extra layer of protection to interaction data recorded in Financial Services Cloud and include encrypted data in more Einstein Classification app datasets (generally available).

Event Monitoring

Opt in or out of generating and receiving event log files. Track file events such as user downloads with real-time notifications (beta). Get more information about SOAP API exceptions and Apex Unexpected Exception events. When you append new data to Event Monitoring Analytics app datasets (beta), data now uploads more efficiently.

IN THIS SECTION:

[Opt in for Event Log File Generation \(Release Update\)](#)

You can now opt in or out of generating and delivering event log files. Previously, all instances received event log files automatically. With this update, event log files are only generated and delivered to instances that opt in to receive event log files. This update automatically disables event log file generation for Developer and Trial editions, and for instances that don't have the Event Monitoring add-on subscription by default. If you have Salesforce Shield or Salesforce Event Monitoring add-on subscriptions, you're opted in to receiving event log files by default. This update is available starting in Spring '23.

[Track File Downloads in Near Real-Time with FileEvent \(Beta\)](#)

With FileEvent in Salesforce Real-Time Event Monitoring, you now get real-time notifications when a user downloads a file. File Event supports transaction security policies.

[Get the Category of the Apex Unexpected Exception Event](#)

Use the new `EXCEPTION_CATEGORY` field of the Apex Unexpected Exception event type of the `EventLogFile` object. The `EXCEPTION_CATEGORY` field provides a breakdown of unhandled exceptions based on the type. For example, the `LimitException` exception type is split into subcategories that indicate if you exceeded the total heap size or CPU time.

[Get More Information about SOAP API Exceptions](#)

Use the new `EXCEPTION_MESSAGE` field for the Apex SOAP Event Type to see information about errors in handling a SOAP API request or why an API request failed.

[Streamline Dataset Updates for the Event Monitoring Analytics App \(Beta\)](#)

Now when you create an app and enable the append dataset configuration (beta), you're less likely to see duplicate records when the dataflow runs. This improvement reduces the chances of reaching your row count limit.

Opt in for Event Log File Generation (Release Update)

You can now opt in or out of generating and delivering event log files. Previously, all instances received event log files automatically. With this update, event log files are only generated and delivered to instances that opt in to receive event log files. This update automatically disables event log file generation for Developer and Trial editions, and for instances that don't have the Event Monitoring add-on subscription by default. If you have Salesforce Shield or Salesforce Event Monitoring add-on subscriptions, you're opted in to receiving event log files by default. This update is available starting in Spring '23.

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. Salesforce provides this preference setting now so that you can choose whether to turn on or off event log file generation in advance. If you want to continue to receive event log files, ensure that this preference setting is turned on. 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 continue to receive event log files when this update takes effect, from Setup, in the Quick Find box, enter *Event Monitoring*, and then select **Event Monitoring Settings**. Then turn on **Generate event log** files, and save your changes.

SEE ALSO:

[Release Updates](#)

Track File Downloads in Near Real-Time with FileEvent (Beta)

With FileEvent in Salesforce Real-Time Event Monitoring, you now get real-time notifications when a user downloads a file. File Event supports transaction security policies.

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



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

Who: This change is available to customers who purchased Salesforce Shield or Salesforce Event Monitoring add-on subscriptions.

SEE ALSO:

[Platform Events Developer Guide: FileEvent \(Beta\)](#)

[Platform Events Developer Guide: FileEventStore \(Beta\)](#)

Get the Category of the Apex Unexpected Exception Event

Use the new `EXCEPTION_CATEGORY` field of the Apex Unexpected Exception event type of the EventLogFile object. The `EXCEPTION_CATEGORY` field provides a breakdown of unhandled exceptions based on the type. For example, the `LimitException` exception type is split into subcategories that indicate if you exceeded the total heap size or CPU time.

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.

SEE ALSO:

[Object Reference for the Salesforce Platform: Apex Unexpected Exception Event Type](#)

Get More Information about SOAP API Exceptions

Use the new `EXCEPTION_MESSAGE` field for the Apex SOAP Event Type to see information about errors in handling a SOAP API request or why an API request failed.

Where: This change applies to Enterprise, Performance, Unlimited, and Developer editions.

Who: This change is available to customers who purchased Salesforce Shield or Salesforce Event Monitoring add-on subscriptions.

SEE ALSO:

[Object Reference for the Salesforce Platform: SOAP API Event Type](#)

Streamline Dataset Updates for the Event Monitoring Analytics App (Beta)

Now when you create an app and enable the append dataset configuration (beta), you're less likely to see duplicate records when the dataflow runs. This improvement reduces the chances of reaching your row count limit.

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.

Shield Platform Encryption

Add an extra layer of protection to interaction data recorded in Financial Services Cloud and include encrypted data in more Einstein Classification app datasets (generally available).

IN THIS SECTION:

[Encrypt More Financial Services Interaction Data](#)

Account records that are related to interactions sometimes contain sensitive or personally identifiable data. Now you can encrypt data at rest in the Comment field on the new Interaction Related Account object with the probabilistic encryption scheme.

[Referral Name No Longer Supported](#)

The Name field on the Referral object is now autogenerated and no longer contains personally identifiable information (PII). To help you focus on only encrypting sensitive or PII data, we removed Shield Platform Encryption compatibility from this field.

[Include Encrypted Data in More Einstein Apps \(Generally Available\)](#)

When you use Einstein apps, you can now use encrypted fields when you build your predictive data models. Shield Platform Encryption helps you meet security and regulatory compliance goals for the data used in Case Classification, Case Wrap-Up, and Reply Recommendation data models.

Encrypt More Financial Services Interaction Data

Account records that are related to interactions sometimes contain sensitive or personally identifiable data. Now you can encrypt data at rest in the Comment field on the new Interaction Related Account object with the probabilistic encryption scheme.

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

Who: This change applies to editions that have both Shield Platform Encryption and Financial Services Cloud add-on subscriptions.

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? \(can be outdated or unavailable during release preview\)](#)

Referral Name No Longer Supported

The Name field on the Referral object is now autogenerated and no longer contains personally identifiable information (PII). To help you focus on only encrypting sensitive or PII data, we removed Shield Platform Encryption compatibility from this field.

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

Who: This change is available to customers who purchase Salesforce Shield or Shield Platform Encryption add-on subscriptions and have access to Public Sector Cloud with Case Referrals enabled.

SEE ALSO:

[Salesforce Help: Which Standard Fields Can I Encrypt? \(can be outdated or unavailable during release preview\)](#)

Include Encrypted Data in More Einstein Apps (Generally Available)

When you use Einstein apps, you can now use encrypted fields when you build your predictive data models. Shield Platform Encryption helps you meet security and regulatory compliance goals for the data used in Case Classification, Case Wrap-Up, and Reply Recommendation data models.

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.

Who: This change applies to editions that have either Shield Platform Encryption or Shield add-on subscriptions.

When: This change starts February 3, 2023.

How: The data models used in Case Classification, Case Wrap-Up, and Reply Recommendation is now automatically access and use field data when it's encrypted, with no extra setup required.

SEE ALSO:

[Salesforce Help: Einstein Classification Apps](#)

[Salesforce Help: Einstein Reply Recommendations](#)

Security Center

Execute CRM Analytics features on Security Center Data. Easily analyze charts within the Configuration metric category with new and improved data labels.

IN THIS SECTION:

[Execute CRM Analytics Features on Security Center Data](#)

Use CRM Analytics to build out dashboards based on your use cases and to report on Security Center data. To execute CRM Analytics features on relevant data, connect to Security Center objects.

[Evaluate Data Quickly with Insightful Data Labels](#)

Analyze charts within the Configuration metric category with new and improved data labels.

Execute CRM Analytics Features on Security Center Data

Use CRM Analytics to build out dashboards based on your use cases and to report on Security Center data. To execute CRM Analytics features on relevant data, connect to Security Center objects.

Where: This change applies to Enterprise, Performance, Unlimited, and Developer editions where Security Center and CRM Analytics are available.

Who: This change is available to CRM Analytics users with the Security Center add-on subscription.

How: From Data Manager, click **Connections**. From the All Connections page, click **New Connection**, then **Salesforce Connector**. Fill out the required fields and search for *TenantSecurity* to set up the connection to Security Center objects.

Data Manager

Home

Jobs Monitor

Data Assets

Recipes

Usage

Connections

Data Templates

Analytics Studio

Connections

All Connections

No connections yet

Q

TenantSecurity

New Connection

Object	Filter	Connec...	Columns	Connec...	La...	Status
TenantSecurityCredentialStuffing	SFDC_LOCA...	6	Incremental ...	Sep 14...	Successful	
TenantSecurityNotification	SFDC_LOCA...	22	Incremental ...	Nov 11...	Successful	
TenantSecurityMetricDetail	SFDC_LOCA...	17	Incremental ...	Nov 11...	Successful	
TenantSecurityHealthCheckDetail	SFDC_LOCA...	15	Incremental ...	Nov 11...	Successful	
TenantSecurityHealthCheckTrend	SFDC_LOCA...	16	Incremental ...	Nov 11...	Successful	
TenantSecurityLogin	SFDC_LOCA...	15	Incremental ...	Nov 11...	Successful	

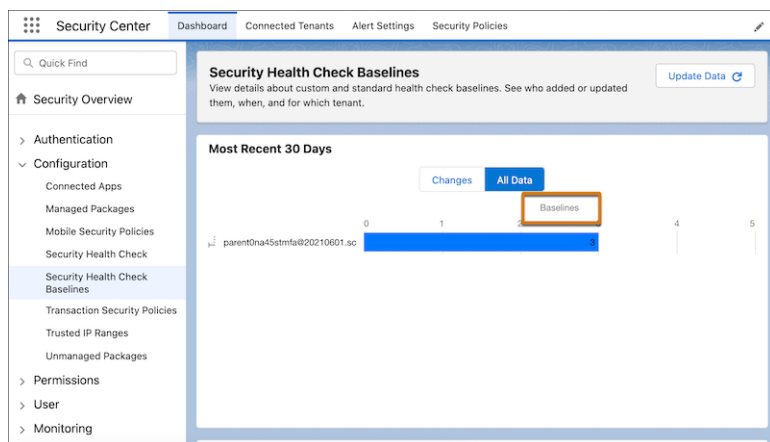
Evaluate Data Quickly with Insightful Data Labels

Analyze charts within the Configuration metric category with new and improved data labels.

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 Security Center, select the Configuration metric category from the Security Overview menu on the left.



Data Mask

Use Data Mask to obfuscate sensitive information in your sandbox so that data isn't replicated in a readable or recognizable way in another environment. Faster job processing times and improvements to unique field masking are headed your way.

IN THIS SECTION:

[Process Data Mask Jobs Faster](#)

Spend less time waiting and more time masking your sandbox data with improved processing times. We removed the batch preparation step, so your Data Mask jobs finish faster.

[Get Improved Unique Field Masking](#)

Pattern masking values that are marked unique and greater than their field length are now shortened differently to ensure data integrity. Previously, the custom pattern value was shortened before the record ID to meet the maximum field length. Now the appended record ID is shortened before the pattern value. If the field value is still too long after the record ID is shortened, you're prompted to edit your custom pattern value to ensure uniqueness.

Process Data Mask Jobs Faster

Spend less time waiting and more time masking your sandbox data with improved processing times. We removed the batch preparation step, so your Data Mask jobs finish faster.

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

When: See faster processing times starting on April 11, 2023.

Who: This product is available to users with the Data Mask managed package.

SEE ALSO:

[Salesforce Help: Secure Your Sandbox Data with Salesforce Data Mask \(can be outdated or unavailable during release preview\)](#)

Get Improved Unique Field Masking

Pattern masking values that are marked unique and greater than their field length are now shortened differently to ensure data integrity. Previously, the custom pattern value was shortened before the record ID to meet the maximum field length. Now the appended record ID is shortened before the pattern value. If the field value is still too long after the record ID is shortened, you're prompted to edit your custom pattern value to ensure uniqueness.

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

SEE ALSO:

[Salesforce Help: Secure Your Sandbox Data with Salesforce Data Mask \(can be outdated or unavailable during release preview\)](#)

Other Security Changes

Increase the security of your named credentials with new configurations. To guard against attacks, content sniffing protection is enforced, and we recommend that you review your clickjack protection settings.

IN THIS SECTION:

[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 and was scheduled to be enforced in Spring '23, but we postponed the enforcement date to Summer '23.

[Use AWS Roles Anywhere with Named Credentials](#)

External credentials that employ the AWS Signature v4 protocol can now use Amazon's Roles Anywhere service to secure AWS integrations via certificates. With Roles Anywhere for named credentials, it's not necessary for AWS administrators to create IAM Users and store their keys in Salesforce.

[Use OAuth JWT Bearer Flow with Named Credentials](#)

Configure external credentials that use the OAuth protocol to use JWT Bearer Flow. JWT Bearer Flow provides increased security for system integrations by employing a JSON Web Token (JWT) and certificates to sign requests. Salesforce named credentials support custom claims with JWT Bearer Flow.

[Make a Private Connection with Named Credentials](#)

Configure named credentials with an outbound network connection so that API traffic to an AWS account is privately routed and doesn't traverse the public internet. This feature has been added to non-legacy credentials.

[Review Your Clickjack Protection Settings](#)

Clickjacking uses a trusted domain or site to trick users into clicking a malicious link. The trusted domain is served in an iframe, then a hidden or transparent UI control is served in the same location. To help protect against this kind of attack, learn more about clickjacking and the Salesforce page types that can be framed. Then review your clickjack settings.

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 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 all 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.

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.

To test the effect of this release update, from Setup, in the Quick Find box, enter *Session Settings*, and then click **Session Settings**. Select **Enable Content Sniffing protection** and save your changes. Then test external links and embedded content. In particular, focus on external links that you added, such as hyperlinks and embedded content on custom Visualforce pages.

SEE ALSO:

[Release Updates](#)

Use AWS Roles Anywhere with Named Credentials

External credentials that employ the AWS Signature v4 protocol can now use Amazon's Roles Anywhere service to secure AWS integrations via certificates. With Roles Anywhere for named credentials, it's not necessary for AWS administrators to create IAM Users and store their keys in Salesforce.

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

How: When creating an external credential from the UI, select **Roles Anywhere (Assume an IAM Role via Certificate)**. You can also use the Metadata, Tooling, and Apex ConnectApi APIs to create and edit external credentials.

SEE ALSO:

[Salesforce Help: Create and Edit an External Credential \(can be outdated or unavailable during release preview\)](#)

[Metadata API Developer Guide: ExternalCredential](#)

[Tooling API: ExternalCredential](#)

[Apex Reference Guide: NamedCredentials Class](#)

[Connect REST API Developer Guide: Named Credentials Resources](#)

Use OAuth JWT Bearer Flow with Named Credentials

Configure external credentials that use the OAuth protocol to use JWT Bearer Flow. JWT Bearer Flow provides increased security for system integrations by employing a JSON Web Token (JWT) and certificates to sign requests. Salesforce named credentials support custom claims with JWT Bearer Flow.

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

How: When creating an external credential from the UI, select **JWT Bearer Flow**. You can also use the Metadata, Tooling, and Apex ConnectApi APIs to create and edit external credentials.

SEE ALSO:

[Salesforce Help: Create and Edit an External Credential \(can be outdated or unavailable during release preview\)](#)

[Metadata API Developer Guide: ExternalCredential](#)

[Tooling API Developer Guide: ExternalCredential](#)

[Apex Reference Guide: NamedCredentials Class](#)

[Connect REST API Developer Guide: Named Credentials Resources](#)

Make a Private Connection with Named Credentials

Configure named credentials with an outbound network connection so that API traffic to an AWS account is privately routed and doesn't traverse the public internet. This feature has been added to non-legacy credentials.

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

How: When creating a named credential from the UI, select **Outbound Network Connection** to use a private connection. You can also use the Metadata, Tooling, and Apex ConnectApi APIs to create and edit named credentials.

SEE ALSO:

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

[Metadata API Developer Guide: NamedCredential](#)

[Tooling API: NamedCredential](#)

[Apex Reference Guide: NamedCredentials Class](#)

[Connect REST API Developer Guide: Named Credentials Resources](#)

Review Your Clickjack Protection Settings

Clickjacking uses a trusted domain or site to trick users into clicking a malicious link. The trusted domain is served in an iframe, then a hidden or transparent UI control is served in the same location. To help protect against this kind of attack, learn more about clickjacking and the Salesforce page types that can be framed. Then review your clickjack settings.

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

SEE ALSO:

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

Service

Explore new Service Cloud features that help you and your team deliver efficient, high-quality service. Share links, questions with options, appointment time slots, post-conversation surveys, and more with messaging components, which are available in enhanced Facebook Messenger channels and Messaging for In-App and Web. Service Cloud Voice call handling time has been improved with the triggering of real-time actions based on intelligence signals detected during calls. Einstein Conversation Mining harnesses the power of Einstein to save you from time-consuming transcript analysis. Send, receive, and view Slack messages from Lightning Experience with the Slack Conversations component. Send internal communications when an incident occurs with new broadcast alerts and broadcast Slack messages. Measure Knowledge ROI with out-of-the-box dashboards for CRM Analytics. Add a screen flow template to help agents find and link callers to leads, contacts, or employees. And more.

IN THIS SECTION:

[Service Cloud Channels](#)

Discover new features in Messaging and Service Cloud Voice. In enhanced Facebook Messenger channels and Messaging for In-App and Web, create messaging components to send structured content such as questions with predefined options. And give agents real-time suggestions during voice calls with Conversation Intelligence.

[Einstein for Service](#)

Einstein Conversation Mining harnesses the power of Einstein to save you from time-consuming transcript analysis. Einstein reviews your transcripts and identifies the top reasons customers contact you, highlighting the best ones for automation. Train your Einstein Classification models with additional fields (Pilot). Include encrypted fields when you train your Case Classification or Reply Recommendations models. Optimize and expand your Einstein Bots portfolio with new ways to work with Goals, and new rich content types and setup improvements for Enhanced Bots.

[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. Report on which skills are most requested in Expert Finder. And find the required skills for a swarm member more easily with searchable skills.

[Customer Service Incident Management](#)

Communicate with internal stakeholders more effectively with broadcast Slack messages and broadcast alerts. Plus, automate your incident management processes with the new Flow Automation Pack for Incident Management.

[Routing](#)

Thanks to rock-star suggestions in Idea Exchange, Omni-Channel supervisors can view contact center metrics in the Omni-Channel Wallboard (pilot) and filter skills more precisely in Skills Backlog and Agent Summary tabs. To allow chats or calls to interrupt less pressing work items such as cases, Omni-Channel's routing logic can consider agents' primary and interruptible capacity (pilot). And if the Service Console isn't open, agents can receive a visual notification when Omni-Channel assigns them a new work item.

[Knowledge](#)

Unlock valuable article insights, change record types for translations, report on draft articles in CRM Analytics, and get updated Knowledge AppExchange packages.

[Cases](#)

Transition to Lightning threading so agents can see the email history for a customer's inquiry in the existing case. Streamline the case feed when agents reply with only new content. Use an external Gmail or Outlook server instead of Salesforce email services so you can meet compliance requirements. Log a call from the case record's Activities component as you do with other objects. Use a default No-Reply email address starting in Summer '23.

[Shift Scheduling for Salesforce Contact Center](#)

Assign agents where and when you need them. Use repeating patterns to create the shifts that you need for your contact centers. Then schedule agents for those shifts with shift scheduling tools available in Salesforce Contact Center.

Feedback Management

Expand the distribution scope of surveys by using the Messaging Notification Flow action. Build a better custom survey UI by using Survey Response Connect APIs.

Service Cloud Channels

Discover new features in Messaging and Service Cloud Voice. In enhanced Facebook Messenger channels and Messaging for In-App and Web, create messaging components to send structured content such as questions with predefined options. And give agents real-time suggestions during voice calls with Conversation Intelligence.

IN THIS SECTION:

Messaging

Use messaging components to send structured content, such as a question with predefined options, in enhanced Facebook Messenger channels and Messaging for In-App and Web. Discover new features in enhanced Facebook Messenger channels, including customer consent management options, agent-to-agent transfers, and new session statuses. And in Messaging for In-App and Web, collect data behind the scenes with hidden pre-chat fields and offer persistent messaging history with User Verification.

Voice

Reduce agent handling times with conversation intelligence and trigger actions for agents in real time. Manage telephony provider queues in Salesforce to adapt to call volume changes. Sync agent presence statuses automatically to reduce human error. Customize call control tools and build softphone extensions to support unique business processes. Include screen flows in screen pops to automate agent tasks. Add a screen flow template to help agents find and link callers to leads, contacts, or employees. Track more Amazon Web Services (AWS) cost and usage metrics. Increase productivity with improved softphones.

Messaging

Use messaging components to send structured content, such as a question with predefined options, in enhanced Facebook Messenger channels and Messaging for In-App and Web. Discover new features in enhanced Facebook Messenger channels, including customer consent management options, agent-to-agent transfers, and new session statuses. And in Messaging for In-App and Web, collect data behind the scenes with hidden pre-chat fields and offer persistent messaging history with User Verification.

IN THIS SECTION:

Send Structured Content with Messaging Components

Make it easier for support agents to share links, ask questions that pinpoint a customer's problem, schedule appointments, send a post-conversation survey, and more. Create a library of user-friendly components that agents can send to customers in enhanced Facebook Messenger channels and Messaging for In-App and Web.

Get Enhanced Messaging for Facebook Messenger

Try the new, improved Messaging. In enhanced Facebook Messenger channels, agents can transfer sessions to other agents and send structured content such as links and questions with options. New session statuses let supervisors route and track messaging sessions more intelligently.

Get Enhanced Messaging for WhatsApp (Generally Available)

Looking to up your WhatsApp communication game? Connect your WhatsApp account to Salesforce, and when customers message you on WhatsApp, agents help them from the Service Console. Enhanced Messaging for WhatsApp includes features like self-service setup and live transfers.

[Customize Your Consent Conversations for Facebook Messenger](#)

Choose whether customers must consent to receive messages in enhanced Facebook Messenger channels, and honor customers' preferences with the help of custom consent-related keywords and responses.

[Manage Consent in Customers' Preferred Languages for Facebook Messenger](#)

Provide more robust multilingual support by setting keywords and auto-responses in multiple languages for your enhanced Messaging channels. Customers can use the keywords to opt out of communications, request information, or ask for help.

[Collect Valuable Customer Data with Hidden Pre-Chat Fields in Messaging for In-App and Web](#)

Want to know what's in a customer's shopping cart or confirm a customer ID? Use Hidden Pre-Chat fields to capture this information without asking the customer directly for it. Then use our API to send data for those fields into Salesforce, and use an Omni flow to send field data to the right place.

[Let Authenticated Customers Access Messaging for In-App and Web History with User Verification](#)

Securely connect your customers to their own messaging history when you create JSON keysets with User Verification. This feature increases the Messaging for Web conversation's history from six hours to an unlimited display time frame. Messaging for In-App continues to display messaging history for an unlimited time frame.

[Quickly Add Context to Conversations with Knowledge Component Actions](#)

Send customers knowledge article URLs or snippets with the Knowledge Component Actions sidebar, available in Messaging for In-App and Web, enhanced Facebook Messenger channels, and enhanced WhatsApp channels. Save time by inserting pre-written information into conversations. Previously, Knowledge Component Actions was available only to chat and standard Messaging channels.

[Increase Agent Productivity with the Actions & Recommendations Component in Messaging](#)

Give agents a list of flows, quick actions, and recommendations to use when engaging a customer. Previously, Actions & Recommendations was available only on Chat, Case, and Voice Call records. For a consistent experience across all channels, Actions & Recommendations is now available on the Messaging Session record.

[Mark Messaging Sessions Inactive](#)

If a customer stops responding without indicating that their issue was resolved, let agents mark their messaging session inactive in enhanced Messaging channels and Messaging for In-App and Web. Marking a session inactive frees up the agent's capacity so they can help the next customer.

[Choose an Action for Your Return or Enter Key in Messaging for Web](#)

You asked, we listened. To optimize the messaging experience for all customers, admins determine whether pressing Return or Enter sends a new message or starts a new line of text.

[Connect Leads to Messaging Users](#)

Learn more about the customer you're messaging. The Lead lookup field on the Messaging User object links to additional information about the person's presale activity.

[View and Share Files More Easily in Messaging for In-App](#)

We've improved the attachment viewer within your mobile app. This viewer includes the ability to share attachments with other apps and services.

[Explore Messaging with Trailhead](#)

Discover the benefits and capabilities of Service Cloud's Messaging portfolio in a new Trailhead module.

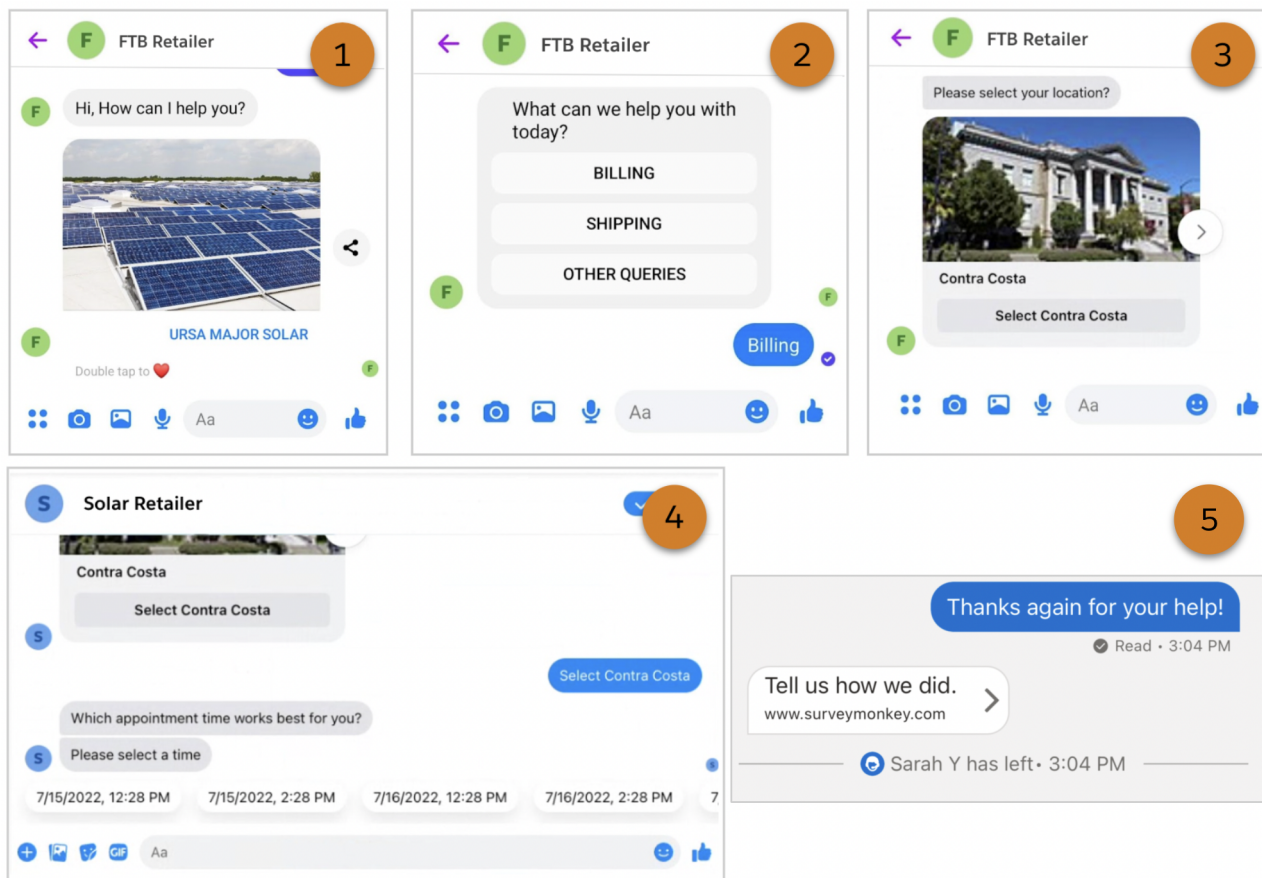
Send Structured Content with Messaging Components

Make it easier for support agents to share links, ask questions that pinpoint a customer's problem, schedule appointments, send a post-conversation survey, and more. Create a library of user-friendly components that agents can send to customers in enhanced Facebook Messenger channels and Messaging for In-App and Web.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions. Messaging components are supported only in enhanced Facebook Messenger channels and Messaging for In-App and Web.

When: Messaging components became available on November 15, 2022.

Why: Messaging components are available as enhanced links (1), questions with static (predefined) options (2), questions with dynamic (customer-specific) options (3), time selectors (4), and auto-responses (5). You can customize the content and format of each component. Auto-response components are supported only in Messaging for In-App and Web.



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 in the supported channels.

To use auto-response components—available only in Messaging for In-App and Web channels—find the Conversation Acknowledgment, Start Conversation, and End Conversation fields in your channel settings. In each field, select an auto-response component. For example, in the End Conversation field, select a component that links to a customer satisfaction survey.

SEE ALSO:

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

[Salesforce Help: Show Messaging Components in the Service Console \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Customize Auto-Responses for Messaging Channels \(can be outdated or unavailable during release preview\)](#)

Get Enhanced Messaging for Facebook Messenger

Try the new, improved Messaging. In enhanced Facebook Messenger channels, agents can transfer sessions to other agents and send structured content such as links and questions with options. New session statuses let supervisors route and track messaging sessions more intelligently.

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

When: Enhanced Facebook Messenger channels became available on November 15, 2022.

Why: Enhanced Messaging provides an intuitive, continuous experience for agents and customers. In enhanced Facebook Messenger channels, you can:

- 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 or mark sessions inactive when the customer stops responding.
- Use new messaging session statuses to expand your routing logic and track Facebook Messenger inquiries.
- Choose how customers opt in to receiving messages from you, and set keywords and auto-responses for multiple languages.

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 Messaging channel is created, you can't change its type from standard to enhanced or vice versa.

Add a Messaging Channel

Introducing Enhanced Messaging

Deliver rich, contextually relevant experiences to your customers and service agents. Communicate more nimbly with the help of interactive messaging components, agent-to-agent transfers, and new session management options.

Interactive Components
 Chat Transfers
 Session Management

[Learn More](#)

What type of messaging channel do you want to create?

☐ Standard
☒ Enhanced

i While enhanced channels include several neat features, you might spot a few differences from standard channels, so choose accordingly. After you create a channel, you can't change its type.

[Back](#) [Next](#)

SEE ALSO:

[Salesforce Help: Messaging Capabilities by Channel and Platform](#) (can be outdated or unavailable during release preview)

[Salesforce Help: Create a Facebook Messenger Channel in Messaging](#) (can be outdated or unavailable during release preview)

[Salesforce Help: Lifecycle of a Messaging Session](#) (can be outdated or unavailable during release preview)

[Trailhead: Salesforce Messaging](#) (can be outdated or unavailable during release preview)

Get Enhanced Messaging for WhatsApp (Generally Available)

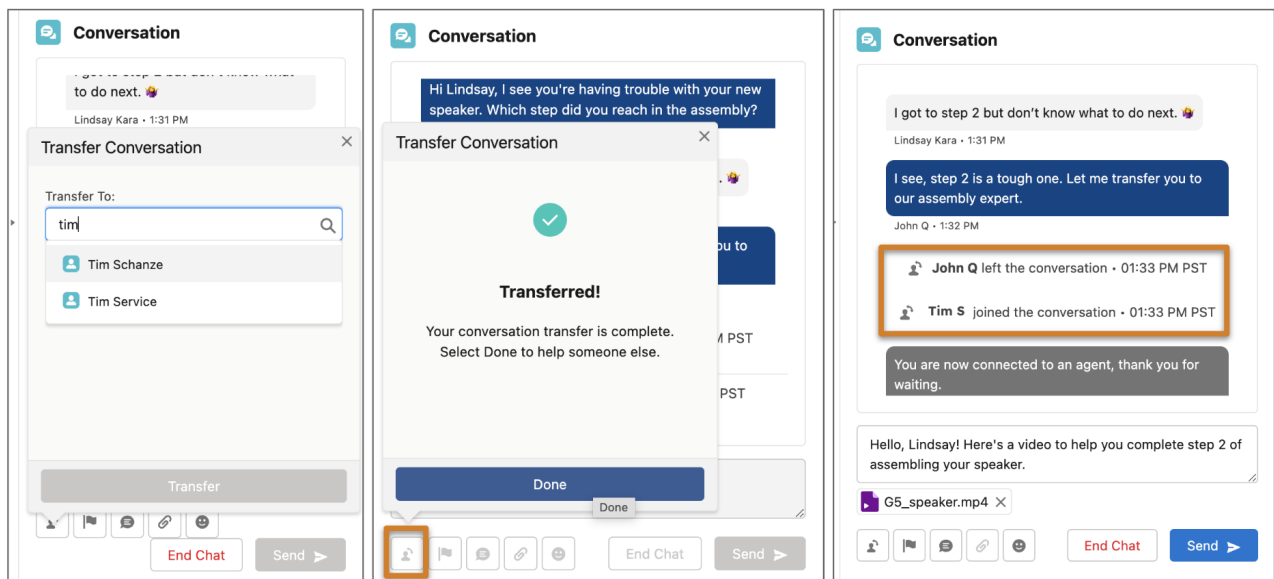
Looking to up your WhatsApp communication game? Connect your WhatsApp account to Salesforce, and when customers message you on WhatsApp, agents help them from the Service Console. Enhanced Messaging for WhatsApp includes features like self-service setup and live transfers.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions. Enhanced Messaging is available only for WhatsApp and Facebook Messenger.

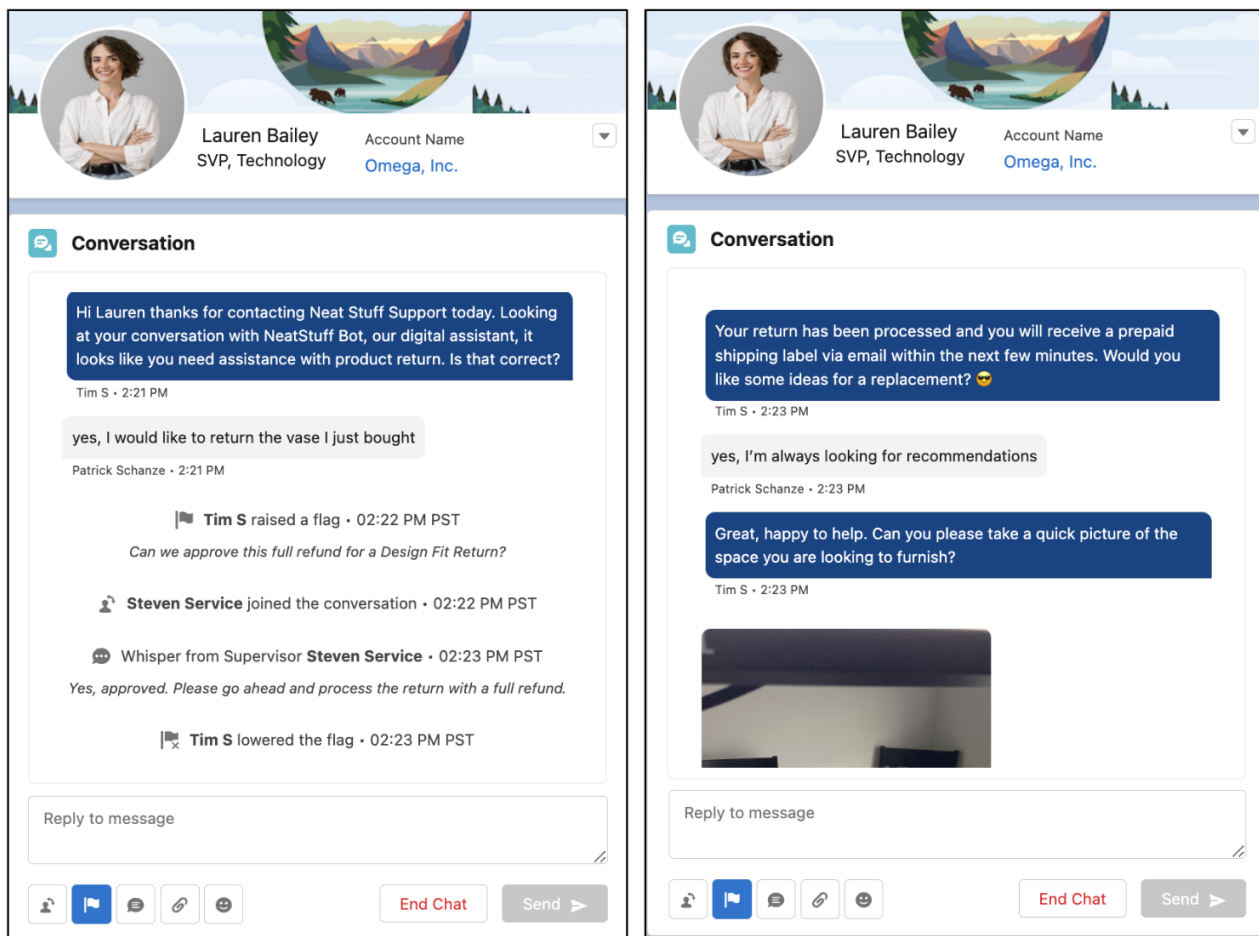
When: You can create enhanced WhatsApp channels starting on March 16, 2023.

Why: Enhanced Messaging provides an intuitive, continuous experience for agents and customers. Enhanced WhatsApp channels include these capabilities.

- **Self-service setup:** Set up the channel yourself in minutes. In Standard Messaging for WhatsApp, you must file a case to request your channel.
- **Bot support:** With the help of Omni-Channel Flow routing, use enhanced bots to address common inquiries over WhatsApp.
- **New session statuses:** Incorporate new messaging session statuses into your routing logic and WhatsApp activity tracking.
- **Consent management:** Customize opt-in and opt-out prompts and responses in multiple languages and set a required level of communication consent for the channel.
- **Content sharing:** Agents and customers can exchange larger files and more types of content, such as audio and video files and stickers.
- **Transfers:** Agents can transfer active messaging sessions to other agents, enhanced bots, or flows.



- **Agent-supervisor collaboration:** Agents can raise flags during active sessions to request help from a supervisor, and supervisors can whisper guidance to agents.



See Enhanced Messaging for WhatsApp in action:

 [Watch a video](#)

How: To create an enhanced WhatsApp channel, go to the Messaging Settings page in Setup and click **New Channel**. Choose **WhatsApp**. When you're prompted to select a channel type, choose **Enhanced**, and walk through the steps to set up your channel. After a Messaging channel is created, you can't change its type from standard to enhanced or vice versa.

SEE ALSO:

[Salesforce Help: Considerations for Using WhatsApp in Service Cloud](#)

[Salesforce Help: Create a WhatsApp Channel in Service Cloud](#)

[Salesforce Help: Compare Messaging Channel Capabilities in Service Cloud](#)

Customize Your Consent Conversations for Facebook Messenger

Choose whether customers must consent to receive messages in enhanced Facebook Messenger channels, and honor customers' preferences with the help of custom consent-related keywords and responses.

Where: This change applies to enhanced Facebook Messenger and enhanced WhatsApp channels in Lightning Experience in Enterprise, Unlimited, and Developer editions.

Why: By default, customers who start a conversation with your company in Facebook Messenger are consenting to receive messages from you. This level of communication consent is known as implicitly opting in. In enhanced Facebook Messenger channels, you can now change the required consent level of your channel to Explicit Opt-In, which requires customers to send a keyword to opt into receiving messages. You can customize your opt-in prompt, keywords, and confirmation message, and also set keywords and responses for these scenarios.

- Opting out of communications
- Requesting help
- Making a custom request. For example, if a customer sends the keywords INFO, you can configure an auto-response with your company's contact information.

In standard Facebook Messenger channels, you can customize these settings only via the API.

How: On the Messaging Settings page in Setup, click the name of your enhanced Facebook Messenger channel. To change the channel's required consent level, update the Consent Type field. Changing the consent type to Explicit Opt-In shows the option to customize your opt-in prompt. To customize your keywords and auto-responses, find your language in the Channel Languages list and select **Edit Language**.

Messaging Consent Settings

Consent Type ⓘ
Explicit Opt-In

Default Prompts

Customize the way that customers opt in to or out of receiving messages on this channel. Write the prompts in the channel's default language.

Opt-In Prompt ⓘ
Hello, can we send you messages on this channel?

Channel Languages

Set consent-related keywords and responses for other languages. [Add Language](#)

Language	Opt-in Keywords	Opt-out Keywords	Help Keywords	Custom Keywords
English (US)	yes	stopall, cancel, stop, unsub...	help	

Remove
Edit Language

SEE ALSO:

[Salesforce Help: Track Customer Consent in Messaging Channels \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Customize Auto-Responses for Messaging Channels \(can be outdated or unavailable during release preview\)](#)

Manage Consent in Customers' Preferred Languages for Facebook Messenger

Provide more robust multilingual support by setting keywords and auto-responses in multiple languages for your enhanced Messaging channels. Customers can use the keywords to opt out of communications, request information, or ask for help.

Where: This change applies to enhanced Facebook Messenger and enhanced WhatsApp channels in Lightning Experience in Enterprise, Unlimited, and Developer editions.

Why: If a customer sends a keyword in a language other than your Salesforce default language, respond in their preferred language. The keyword must be the only content of the message. The opt-in prompt always uses your default language and can't be customized for other languages.

How: In your channel settings, click **Add Language** under Messaging Consent Settings. Select a language and configure its keywords and responses. You can use a keyword only once across all added languages.

Messaging Consent Settings

Consent Type ⓘ
Explicit Opt-In

Default Prompts

Customize the way that customers opt in to or out of receiving messages on this channel. Write the prompts in the channel's default language.

Opt-In Prompt ⓘ
Can we send you messages on this channel?

Channel Languages

Set consent-related keywords and responses for other languages.

[Add Language](#)

Language	Opt-in Keywords	Opt-out Keywords	Help Keywords	Custom Keywords
German	anfangen,melden	absagen,abmelden	hilfe	informationen
English (US)	start,opt in,subscribe	stopall,cancel,stop,unsubscr...	help,assistance	info,information
French	commencer,s'abonner	annuler,se désabonner,arrêt...	aider,aide	compte

Multilanguage support isn't available for the auto-responses shown when an agent joins the conversation or when a conversation starts or ends.

SEE ALSO:

[Salesforce Help: Track Customer Consent in Messaging Channels \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Customize Auto-Responses for Messaging Channels \(can be outdated or unavailable during release preview\)](#)

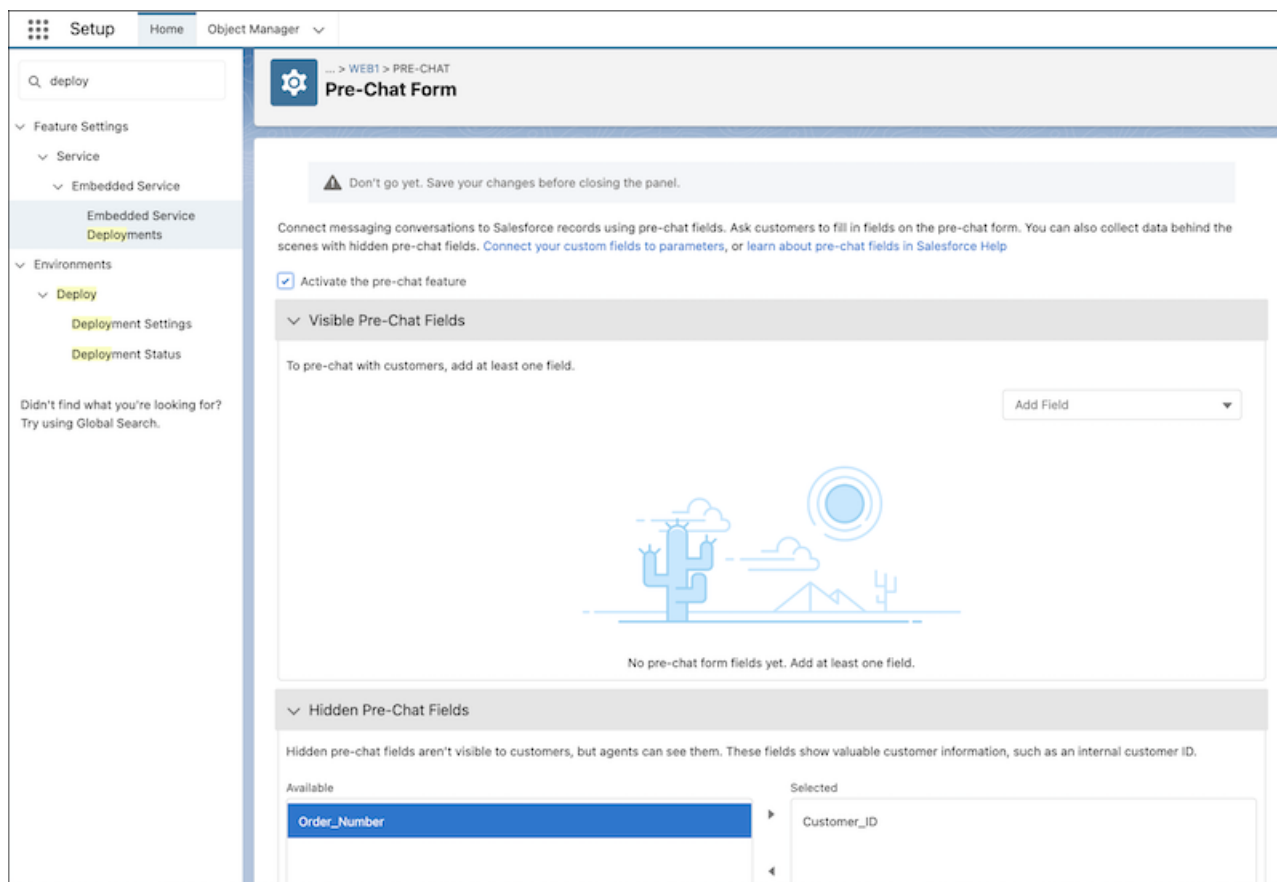
Collect Valuable Customer Data with Hidden Pre-Chat Fields in Messaging for In-App and Web

Want to know what's in a customer's shopping cart or confirm a customer ID? Use Hidden Pre-Chat fields to capture this information without asking the customer directly for it. Then use our API to send data for those fields into Salesforce, and use an Omni flow to send field data to the right place.

Where: This feature is available in 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: Admins with Customize Application and Modify Metadata Through Metadata API Functions permissions can add hidden fields to the pre-chat form and map them to a flow using parameters.

How: An admin creates custom parameters, and adds them to the pre-chat form as hidden fields. Customers don't manually fill out hidden pre-chat fields, so we provide an API to fill them out automatically. Messaging for Web customers use a JavaScript API and Messaging for In-App customers use the iOS and Android SDKs.



After adding hidden fields to the pre-chat form and configuring the API to populate them, an admin uses a flow to perform tasks such as determining where the messaging session should be routed, or saving pre-chat data to a record.

When your customer fills out and submits the pre-chat form, any hidden pre-chat fields are also populated and sent to the messaging session record.

SEE ALSO:

[Salesforce Help: Customize the Pre-Chat Form for Messaging for In-App and Web \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Map Pre-Chat Values and Route for Omni-Channel Flow \(can be outdated or unavailable during release preview\)](#)


Let Authenticated Customers Access Messaging for In-App and Web History with User Verification

Securely connect your customers to their own messaging history when you create JSON keysets with User Verification. This feature increases the Messaging for Web conversation's history from six hours to an unlimited display time frame. Messaging for In-App continues to display messaging history for an unlimited time frame.

Where: This feature is available in 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: Admins with Customize Application permission can set up User Verification for a mobile app or external website. User Verification doesn't work with experience sites.

How: Upload JSON web keys to create a keyset in the User Verification setup page (1). Then turn on User Verification and select the keyset in the Messaging Settings setup page (2). From your website or mobile app, use the APIs we provide to send the customer token to Salesforce.

 **SETUP**

Messaging for In-App and Web User Verification

Messaging for In-App and Web User Verification

1

Create or upload public JSON Web Keys, and use them to verify messaging sessions. User verification allows your authenticated customers to view their conversation history in the Messaging for In-App and Web conversation window. [Learn More](#)

JSON Web Keys

New Key

2 items • Sorted by Key Name • Filtered by All public key certificates

Key Name ↑	Active	Expiration Date	Description
CustomerKey1	<input checked="" type="checkbox"/>		Customer key1
CustomerKey2	<input checked="" type="checkbox"/>		

JSON Web Keysets

New Keyset

1 item • Sorted by Type • Filtered by All public key certificate sets

API Name	Description	Type ↑
CustomerKeySet1		Keys

SETUP > MESSAGING SETTINGS

Messaging for In-App and Web

In-App and Web

* Channel Name: Ursa Major Customer Support

* Developer Name: Ursa_Major_Customer_Support

☒ Active

User Verification

☒ Add User Verification

* Keyset: Select a keyset...

CustomerKeySet1 X

Omni-Channel Routing

Select your routing type and add queue details if required.

Routing Type: Omni-Queue ▼

* Queue: test miaw X

Estimated Wait Time

When your customer logs into your website, then starts a messaging session, User Verification lets them view their messaging history.

SEE ALSO:

[Salesforce Help: Let Customers View Messaging History with User Verification \(can be outdated or unavailable during release preview\)](#)

Quickly Add Context to Conversations with Knowledge Component Actions

Send customers knowledge article URLs or snippets with the Knowledge Component Actions sidebar, available in Messaging for In-App and Web, enhanced Facebook Messenger channels, and enhanced WhatsApp channels. Save time by inserting pre-written information into conversations. Previously, Knowledge Component Actions was available only to chat and standard Messaging channels.

Where: This feature is available in Messaging for In-App and Web, enhanced Facebook Messenger, and enhanced WhatsApp channels. Salesforce Knowledge is available in Unlimited Edition with Service Cloud and for an additional cost in Performance, Enterprise, and Developer editions.

Who: User permissions vary depending on how you set up and use the Knowledge Component Actions sidebar.

How: To let agents embed articles directly into the messaging conversation, create a communication channel mapping on the Knowledge object. To allow agents to send article URLs, select **Allow users to share articles via public URLs** on the Knowledge Settings page in Setup.

Agents click the dropdown icon in the Knowledge Component Actions sidebar to insert a URL or article snippet into the messaging conversation.

SEE ALSO:

[Salesforce Help: Set Up Knowledge Component Actions \(can be outdated or unavailable during release preview\)](#)

Increase Agent Productivity with the Actions & Recommendations Component in Messaging

Give agents a list of flows, quick actions, and recommendations to use when engaging a customer. Previously, Actions & Recommendations was available only on Chat, Case, and Voice Call records. For a consistent experience across all channels, Actions & Recommendations is now available on the Messaging Session record.

Where: This feature is available in all standard Messaging channels, enhanced Messaging channels, and Messaging for In-App and Web.

Who: User permissions vary depending on how you set up and use Actions & Recommendations.

How: Create the Actions & Recommendations deployment and add it to the Messaging Session page in Lightning App Builder.

An agent selects an action to take from the Actions & Recommendations component on a Messaging Session record.

SEE ALSO:

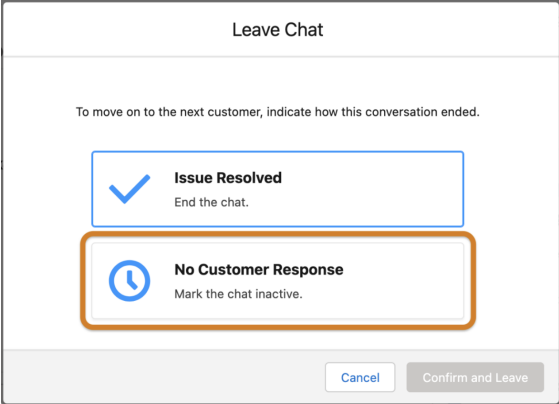
[Salesforce Help: Flow Builder for Service and the Actions & Recommendations Component \(can be outdated or unavailable during release preview\)](#)

Mark Messaging Sessions Inactive

If a customer stops responding without indicating that their issue was resolved, let agents mark their messaging session inactive in enhanced Messaging channels and Messaging for In-App and Web. Marking a session inactive frees up the agent's capacity so they can help the next customer.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions. The Inactive status is available in enhanced Facebook Messenger channels, enhanced WhatsApp channels, and Messaging for In-App and Web.

How: To mark a session inactive, close the session tab in the Service Console. In the prompt, select **No Customer Response**.



Leave Chat

To move on to the next customer, indicate how this conversation ended.

☐ **Issue Resolved**
End the chat.

☒ **No Customer Response**
Mark the chat inactive.

If the customer responds after the session is marked inactive, the status switches to Waiting as the session is routed again. Similarly, if an agent goes offline for any reason, their session is rerouted to ensure that the customer continues to receive support.

SEE ALSO:

[Salesforce Help: Lifecycle of a Messaging Session \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: End or Transfer a Messaging Session \(can be outdated or unavailable during release preview\)](#)

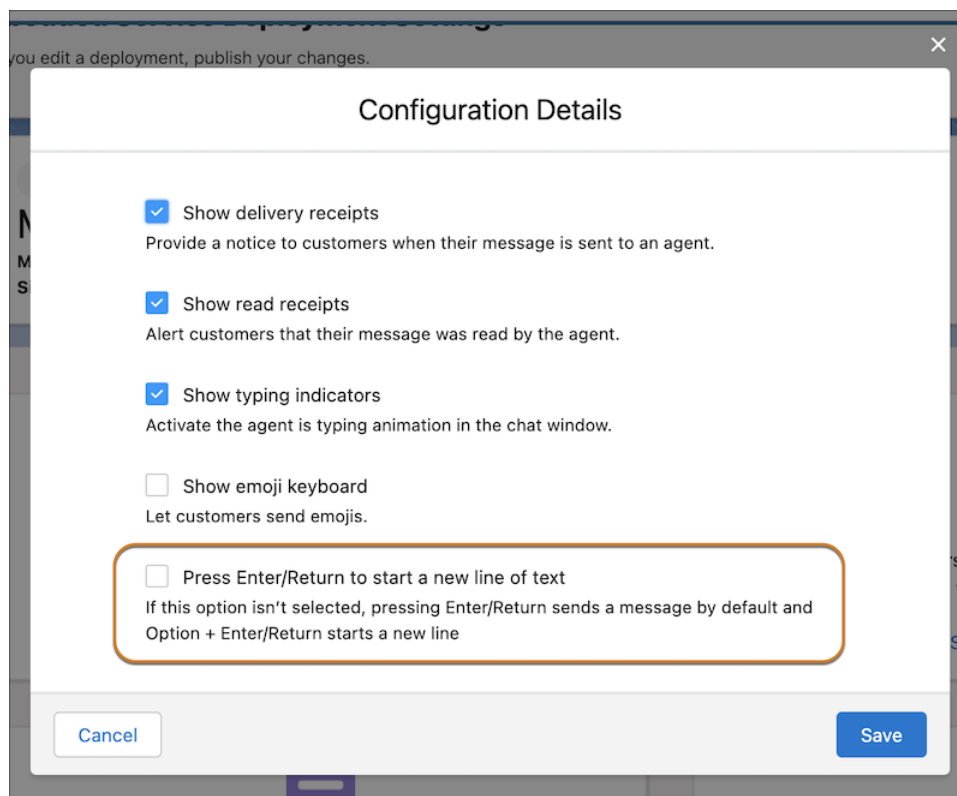
Choose an Action for Your Return or Enter Key in Messaging for Web

You asked, we listened. To optimize the messaging experience for all customers, admins determine whether pressing Return or Enter sends a new message or starts a new line of text.

Where: This feature is available in 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: Admins with Customize Application and Modify Metadata Through Metadata API Functions permissions can change the action for the Enter or Return key.

How: By default, pressing Return or Enter sends a new message. To change this behavior, go to Settings in the Embedded Service Deployments setup page and select **Press Enter/Return to start a new line of text**. In either case, you can override the setting by pressing Option + (Return or Enter) (Mac) or Alt + (Return or Enter) (Windows). For example, if you change the default to make Return or Enter start a new line of text, pressing Option + (Return or Enter) on a Mac sends the message.



SEE ALSO:

[Salesforce Help: Set the Enter or Return Key to Insert a New Line of Text Instead of Send a Message in Messaging for In-App and Web](#)
(can be outdated or unavailable during release preview)

Connect Leads to Messaging Users

Learn more about the customer you’re messaging. The Lead lookup field on the Messaging User object links to additional information about the person’s presale activity.

Where: This field is available in all standard Messaging channels, enhanced Messaging channels, and Messaging for In-App and Web.

Why: This lookup relationship standardizes the way that you identify the individual on the other end of a voice call or messaging conversation. All these interactions involve the messaging user record, which lets you build consistent reporting, workflows, automations, and customizations across channels.

Messaging User

Emily Roberts

EditDelete

Contact

Account

Message Type

Messaging Consent Status

Messaging Channel

Ursa Major Solar

Embedded Messaging

Implicitly Opted In

admin_esw

Related

Details

Information

mode=View, version=RRH

Contact

Messaging User Name

Messaging Platform Key

Messaging Consent Status

Profile Picture URL

Account

Message Type

Messaging Channel

Locale

Lead

Ursa Major Solar

Embedded Messaging

admin_esw

Emily Roberts

SEE ALSO:

[Salesforce Developer Guide: Object Reference for MessagingEndUser](#)

View and Share Files More Easily in Messaging for In-App

We’ve improved the attachment viewer within your mobile app. This viewer includes the ability to share attachments with other apps and services.

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: A developer using the Messaging for In-App UI SDK for iOS or Android has access to the improved attachment viewer.

SEE ALSO:

[Salesforce Help: Messaging Capabilities by Channel and Platform \(can be outdated or unavailable during release preview\)](#)

Explore Messaging with Trailhead

Discover the benefits and capabilities of Service Cloud's Messaging portfolio in a new Trailhead module.

How: Check it out: [Salesforce Messaging](#).

Voice

Reduce agent handling times with conversation intelligence and trigger actions for agents in real time. Manage telephony provider queues in Salesforce to adapt to call volume changes. Sync agent presence statuses automatically to reduce human error. Customize call control tools and build softphone extensions to support unique business processes. Include screen flows in screen pops to automate agent tasks. Add a screen flow template to help agents find and link callers to leads, contacts, or employees. Track more Amazon Web Services (AWS) cost and usage metrics. Increase productivity with improved softphones.

IN THIS SECTION:

[Reduce Agent Handling Time with Conversation Intelligence](#)

Automatically trigger real-time actions in Service Cloud Voice based on intelligence signals detected during calls. To help your agents during conversations with customers, trigger actions such as suggesting recommendations and showing scripts. For example, create a rule that suggests the next best action to an agent when a customer says that they want to cancel their subscription.

[Unify Queue Management in Salesforce and Your Telephony Provider \(Generally Available\)](#)

To quickly adapt to changes in call volume, supervisors can reassign groups and agents to queues—all from within Omni Supervisor. Those changes are copied to the telephony provider system to keep it in sync with Salesforce. This feature is now generally available.

[Sync Agent Presence Statuses Automatically for Each Contact Center](#)

Let your contact centers automatically sync agents' Omni-Channel presence statuses to indicate their availability to receive work. Reduce human error by selecting the Presence Status Sync button on your contact centers to detect and restore out-of-sync statuses. If your contact center supports custom mappings between routable presence statuses to non-routable presence statuses or vice versa, don't select this button or your custom mappings won't work.

[Customize Softphone Controls and Voice Extensions](#)

Build user interfaces and agent actions in the Omni-Channel widget for unique business needs. For example, developers can include buttons on Service Cloud Voice softphones to request video or screen captures and show daily engagement metrics. Developers can add Lightning Web Components, Lightning components, and Visualforce pages to a new softphone extension that opens like a drawer when agents click More.

[Automate Agent Tasks with Customized Screen Pops](#)

Streamline agent work by adding your business processes to incoming conversations. With screen pops, automatically launch a screen flow in a subtab on agents' screens when they accept conversations from channels. For example, add a screen flow to incoming calls or messaging that helps agents easily search and link callers to contacts.

[Add a Flow Template for Find Contact Associated with Voice Call](#)

To improve service and data quality, add a screen flow that guides agents to find and link callers to leads, contacts, or employees. Let agents easily find and link contacts to active voice calls using the new Find Contact Associated with Voice Call flow template. Use the template to customize search criteria, record creation, creation screens, record match screens, and output parameters for other flows.

[Track More AWS Cost and Usage Metrics with Service Cloud Voice](#)

Run reports on cost and usage of Amazon Web Services (AWS) with Service Cloud Voice. Add three new fields to custom reports to gain insights on billed AWS service, usage quantity, and usage unit. Use quantity and unit together to understand measurements. Quantity and unit have replaced the Telephony Minute field.

[Update Service Cloud Voice After a My Domain Change](#)

The URLs that Salesforce serves for your org change when you deploy enhanced domains in a sandbox or when you rename your Salesforce My Domain. If you have Service Cloud Voice with Amazon Connect as your telephony provider, you don't have to do anything because Salesforce automatically updates your orgs with the new URLs when you change your domain. Salesforce also upgrades your contact centers and Lambda functions to the latest available version. You can roll back the Lambda functions if you want to keep your customized versions. If you use Service Cloud Voice with Partner Telephony, you must update your configuration with the new URLs when you rename your My Domain.

[Reach Your Customers Using High-Volume Outbound Calls](#)

Don't waste time or money on another tool to handle your outbound calls to prospects and customers. Instead, contact millions of people with Amazon Connect Outbound Campaigns. For example, use this feature to remind customers about service appointments, deliveries, and payments due. Or use it to market new products and services.

[Authenticate Callers Using Their Voice](#)

Stop asking endless security questions to authenticate your customers over the phone. Instead, use Voice ID powered by Amazon Connect. Using a caller's voice biometrics, Voice ID verifies the identity of the caller and detects fraud risk. An individual's unique voice properties make it difficult to spoof.

[Build Your Voice Call Journeys with Modularized Flows in Amazon Connect](#)

Customize voice call journeys with Amazon Connect contact flows for Service Cloud Voice. Start with an inbound, transfer, or outbound flow, then add subflows to determine how to handle voice calls. For example, add a callback subflow to an inbound flow to give callers the option to receive a callback rather than wait in queue for an agent to pick up.

[Fewer Permissions Required to Manage Your Contact Center](#)

To restrict permissions used internally after your contact center is provisioned, Service Cloud Voice no longer uses the ProvisioningRole IAM role to manage your contact center. Instead, it uses a new IAM role to add and remove users, queues, phone channels, queue mappings, and presence status mappings in your contact center. For Service Cloud Voice with Amazon Connect, the new role is AmazonConnectManagementRole. For Service Cloud Voice with Partner Telephony from Amazon Connect, the new role is SCVAmazonConnectManagementRole.

[Increase Productivity with an Improved Softphone](#)

Clearer button labels help you spot actions more easily and add others to calls with a click. Pesky callouts no longer obscure call buttons and details. Hear a dual-tone multi-frequency tone (DTMF) when numbers are pressed.

[Preview Estimated Wait Times Before Transferring Calls](#)

Agents can provide better service by seeing estimated wait times for partner queues before they transfer calls. Salesforce calculates estimated wait times only if 10 calls were made to the queue over the past 10 minutes. If this criterion isn't met, the estimated wait time isn't shown.

[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.

Reduce Agent Handling Time with Conversation Intelligence

Automatically trigger real-time actions in Service Cloud Voice based on intelligence signals detected during calls. To help your agents during conversations with customers, trigger actions such as suggesting recommendations and showing scripts. For example, create a rule that suggests the next best action to an agent when a customer says that they want to cancel their subscription.

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: Define rules that invoke next best actions and autolaunched flows based on detected signals from your telephony provider. Use Next Best Action recommendations to show agents what to do next based on the current conversation with the customer. Use auto-launched flows to run small-to-complex business processes and perform quick actions, such as send an email, create a task, or create an account.

Create Rule

☒ Active ⓘ

* Rule Label ⓘ

Update Next Best Action

* Developer Name ⓘ

UpdateNextBestAction

* Action ⓘ

Update Next Best Action ▼

* Service Channel Instance ⓘ

Voice Channel ▼

* Intelligence Signal Source

Amazon Connect Contact Lens ▼

Conditions

Take Action When

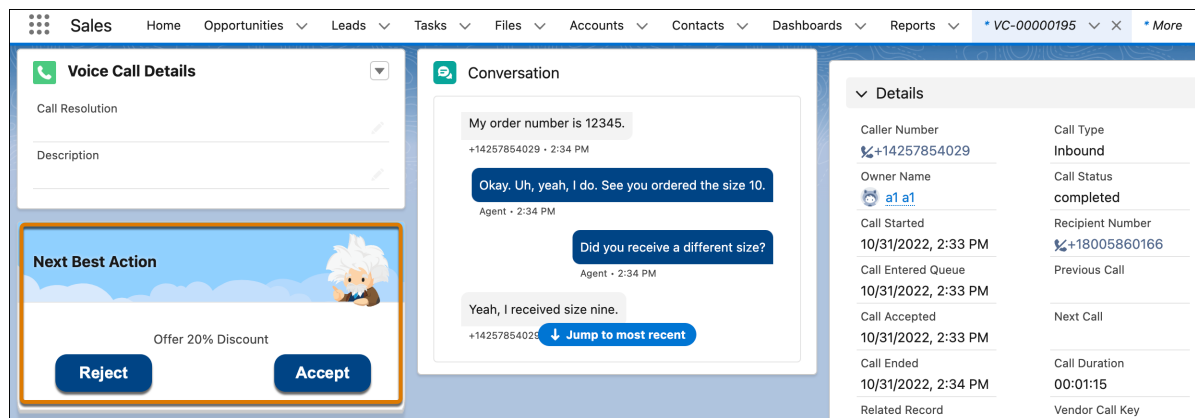
Any Condition Is Met ▼

	Signal Type	Operator	* Value	
1	Category ▼	Equals ▼	Service-Cancellation	🗑️

+ Add Condition

Save

When a signal is detected, Service Cloud Voice initiates the associated action. For example, a Next Best Action recommends that the agent offer the customer a 20% discount. The agent can then accept or reject the recommendation.



SEE ALSO:


[Salesforce Help: Reduce Agent Handling Time with Conversation Intelligence \(can be outdated or unavailable during release preview\)](#)

Unify Queue Management in Salesforce and Your Telephony Provider (Generally Available)

To quickly adapt to changes in call volume, supervisors can reassign groups and agents to queues—all from within Omni Supervisor. Those changes are copied to the telephony provider system to keep it in sync with Salesforce. This feature is now generally available.

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

 **Note:** Queue Management isn't available for contact centers that were set up with Service Cloud Voice with Partner Telephony from Amazon Connect before Spring '22.

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 update your telephony system based on changes to Salesforce queues and groups, under Amazon Setup or Partner Telephony Setup, enable the **Update Amazon Connect Queues and Routing Profiles** or **Update Partner Telephony Queues and Groups** option.

Then you can add and manage queues, groups, and agents in the contact center details page. If your telephony provider supports groups, you can assign agents to queues in bulk by adding agents to groups, and then adding the groups to queues. If groups aren't supported, add agents directly to queues.

The screenshot shows the 'Service Setup' page for 'Service Cloud Voice'. The left sidebar contains a navigation menu with 'Channels' expanded, showing 'Phone' and 'Voice'. Under 'Voice', 'Partner Telephony Contact Centers' is highlighted. The main content area has three sections:

- Contact Center Users:** A table with columns: Full Name, Email, Permission Sets, User Profile, and Contact Center Group. It lists 'Admin User' with email 'ssarikonda+stnfa-byotdem...'. An 'Assign to Group' button is highlighted with an orange box.
- Contact Center Queues:** A table with columns: Salesforce Queue, democonnector Queue, Created Date, Last Modified By, and Last Modified Date. It lists 'Customer Support' and 'IT Support'. 'Add' and 'Remove' buttons are highlighted with an orange box.
- Contact Center Groups:** A table with columns: Salesforce Group, # of Agents, Last Modified By, and Last Modified Date. It lists 'Group 1', 'Group 2', and 'Group1'. An 'Add' button is highlighted with an orange box.

To change the agents assigned to a queue, in the Queues Backlog tab of Omni Supervisor, a supervisor can click **Assign Agents**.

The 'Assign Agents' dialog box is shown, with the subtitle 'Change queue assignments'. It features a 'Queues' sidebar with 'Customer Support' selected. The main area shows '2 agents total' and a search bar. Below, a list of agents is displayed with checkboxes:

Agent	Assigned Through Group or Role
<input checked="" type="checkbox"/> Admin User	
<input checked="" type="checkbox"/> April Tsang	
<input type="checkbox"/> Brian McKnight	
<input type="checkbox"/> Scarlett Ma	

At the bottom, there are 'Cancel' and 'Done' buttons.

In this generally available version of this feature, you can now manage partner telephony provider queues from Service Cloud Voice. Previously, you could manage Amazon Connect queues only.

SEE ALSO:

[Salesforce Help: Manage Contact Center Queues in Salesforce and Your Telephony Provider \(can be outdated or unavailable during release preview\)](#)

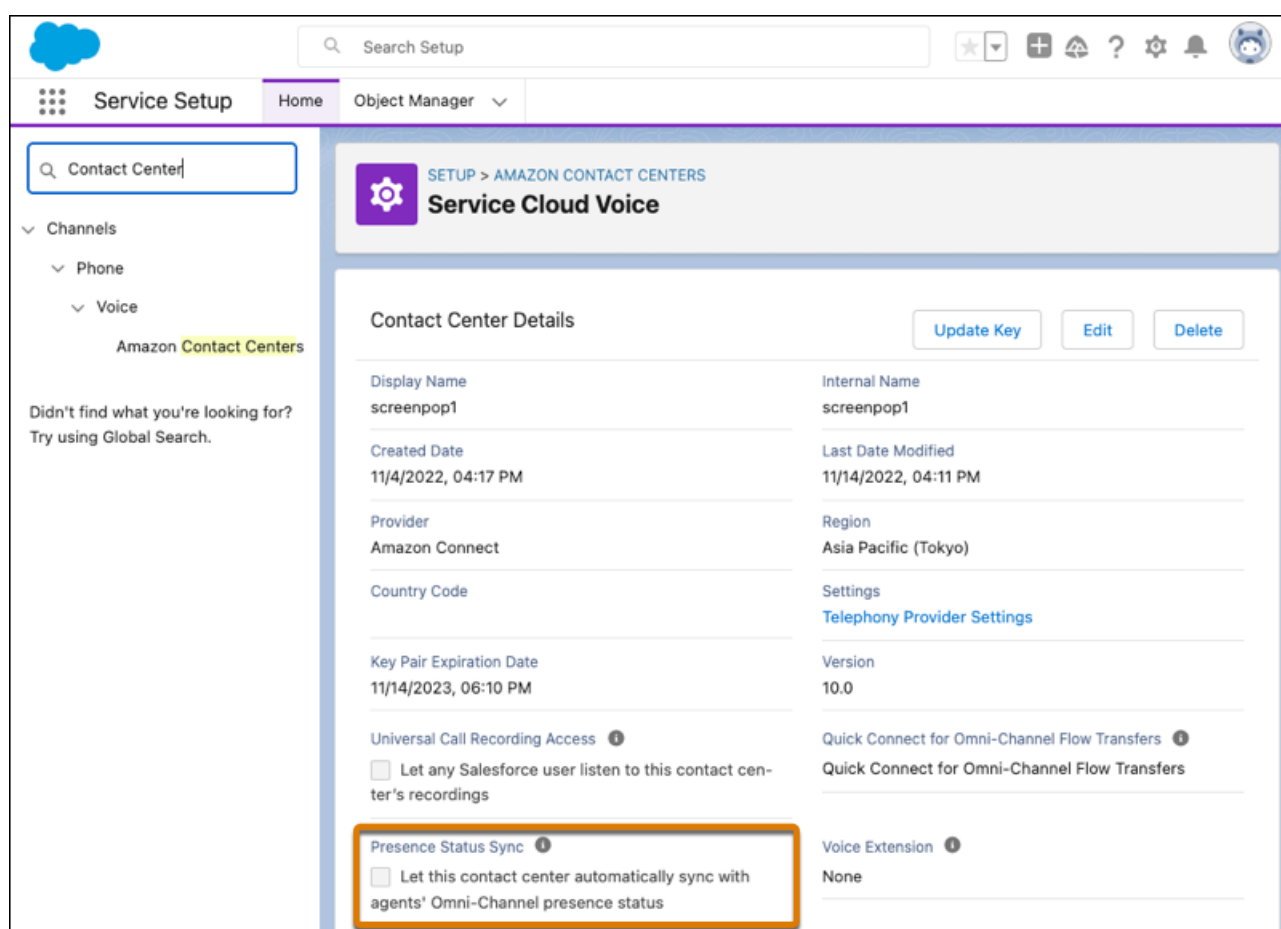
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SEE ALSO:

[Salesforce Help: Configure Your Service Cloud Voice Contact Center \(can be outdated or unavailable during release preview\)](#)

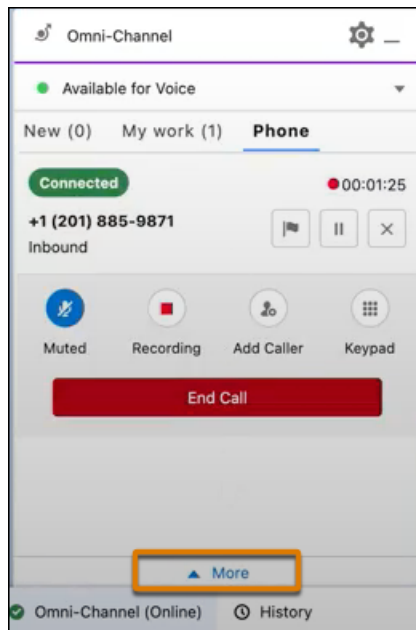
Customize Softphone Controls and Voice Extensions

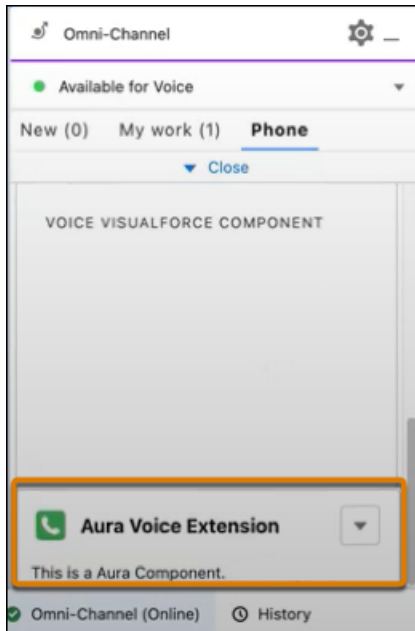
Build user interfaces and agent actions in the Omni-Channel widget for unique business needs. For example, developers can include buttons on Service Cloud Voice softphones to request video or screen captures and show daily engagement metrics. Developers can add Lightning Web Components, Lightning components, and Visualforce pages to a new softphone extension that opens like a drawer when agents click More.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions. Available in Salesforce orgs with these [telephony models](#):

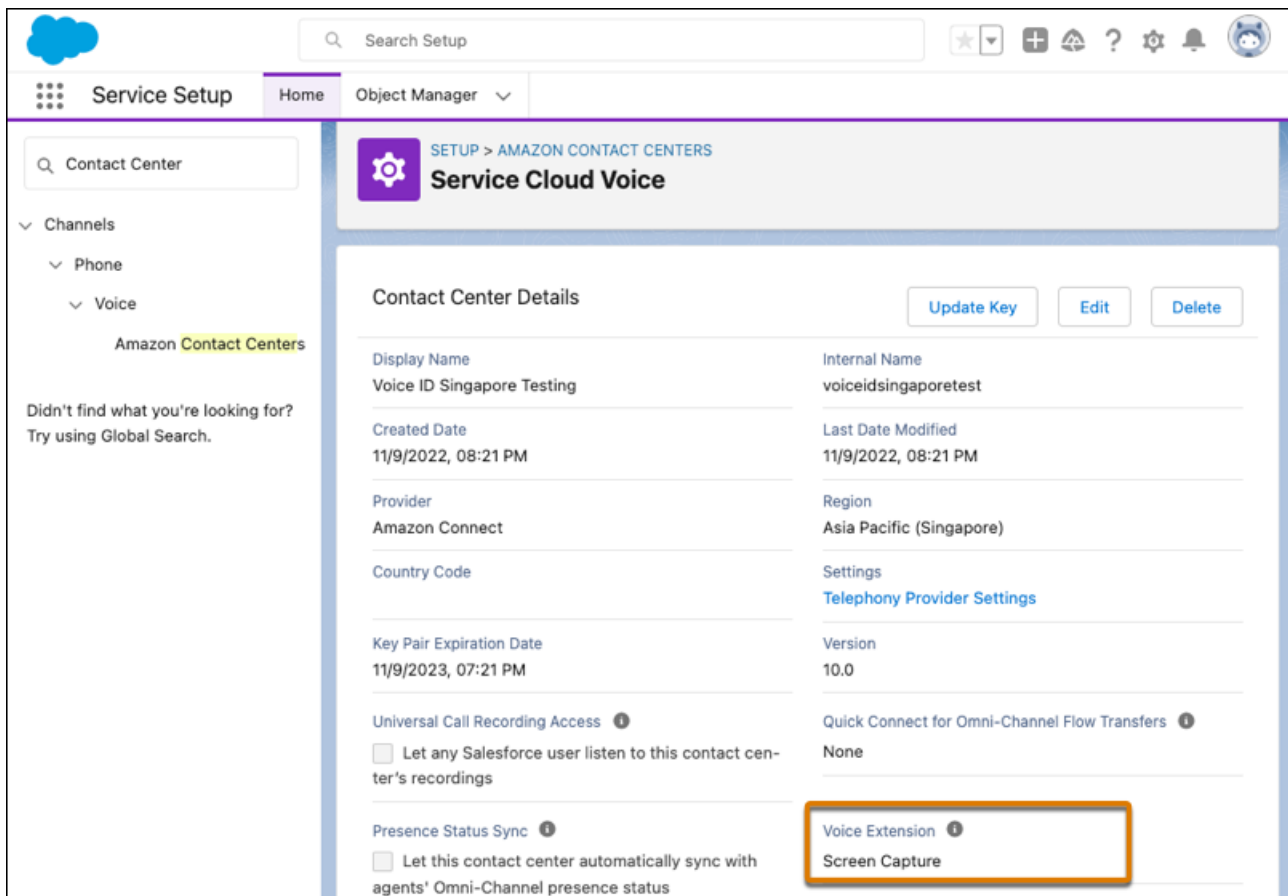
- Service Cloud Voice with Amazon Connect
- Service Cloud Voice with Partner Telephony
- Service Cloud Voice with Partner Telephony from Amazon Connect

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: Use Lightning App Builder to create a custom voice extension as a Lightning page. Then add it to the Voice Extension field on your Contact Center Details page in Setup. Partners can distribute custom Voice extensions as packages on AppExchange.



SEE ALSO:

[Salesforce Help: Customize Call Controls and Voice Extensions \(can be outdated or unavailable during release preview\)](#)

Automate Agent Tasks with Customized Screen Pops

Streamline agent work by adding your business processes to incoming conversations. With screen pops, automatically launch a screen flow in a subtab on agents' screens when they accept conversations from channels. For example, add a screen flow to incoming calls or messaging that helps agents easily search and link callers to 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.

Who: The Add Screen Pop action is available to users with the Manage Flow permission.

How: To set up screen pops, add a Screen Pop action to the Omni-Channel flow and specify which screen flows to open. Pass the Screen Pop action output to the Route Work action to open the screen pops when the agent accepts work. To add more intelligence to your flows, use the screenPop or screenPopsOutput parameters on the Add Screen Pop action to start screen flow targets.

Edit Action

screen pop (screen_pop) 

Use a screen pop to show supporting information when the agent accepts work. For example, add multiple screen pops to open the customer's contact, case, and order record details when the agent accepts a chat, a call, or other work item. [Learn More](#)

Set Input Variables



To use previous screen pop output or to add current screen pop output, specify a resource in Screen Pop Output Record Collection.










Screen Pop Output Record Collection

Enter name or search resources... Q

Set Screen Pop Details

Select the record and screen flows to use as screen pops. Each screen pop opens in a separate subtab when an agent accepts work. Subtabs are displayed in the order listed. The screen pop with Focus enabled is the active subtab.

Screen Pop Type	* Record		Focus 	
Record ▼	{!recordId}		<input type="checkbox"/>	

Screen Pop Type	Type 	* Screen Flow Name	Focus 	
Screen Flow ▼	Screen Flow ▼	<div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> Search...  Q </div> <ul style="list-style-type: none">  Derek's ID Contact for...  Id contact for voice ca...  Siva Id for voice  colflow  colflow_Dena 	<input type="checkbox"/>	

+ Add Screen Pop

> Advanced

Cancel
Done

SEE ALSO:

[Salesforce Help: Add Screen Pops to Give Agents More Context about Conversations](#) (can be outdated or unavailable during release preview)

[Salesforce Help: Store Screen Pop Instructions in a Variable](#) (can be outdated or unavailable during release preview)

[Salesforce Help: Using Multiple Add Screen Pop Actions in an Omni-Channel Flow](#) (can be outdated or unavailable during release preview)

[Add a Flow Template for Find Contact Associated with Voice Call](#)

Add a Flow Template for Find Contact Associated with Voice Call

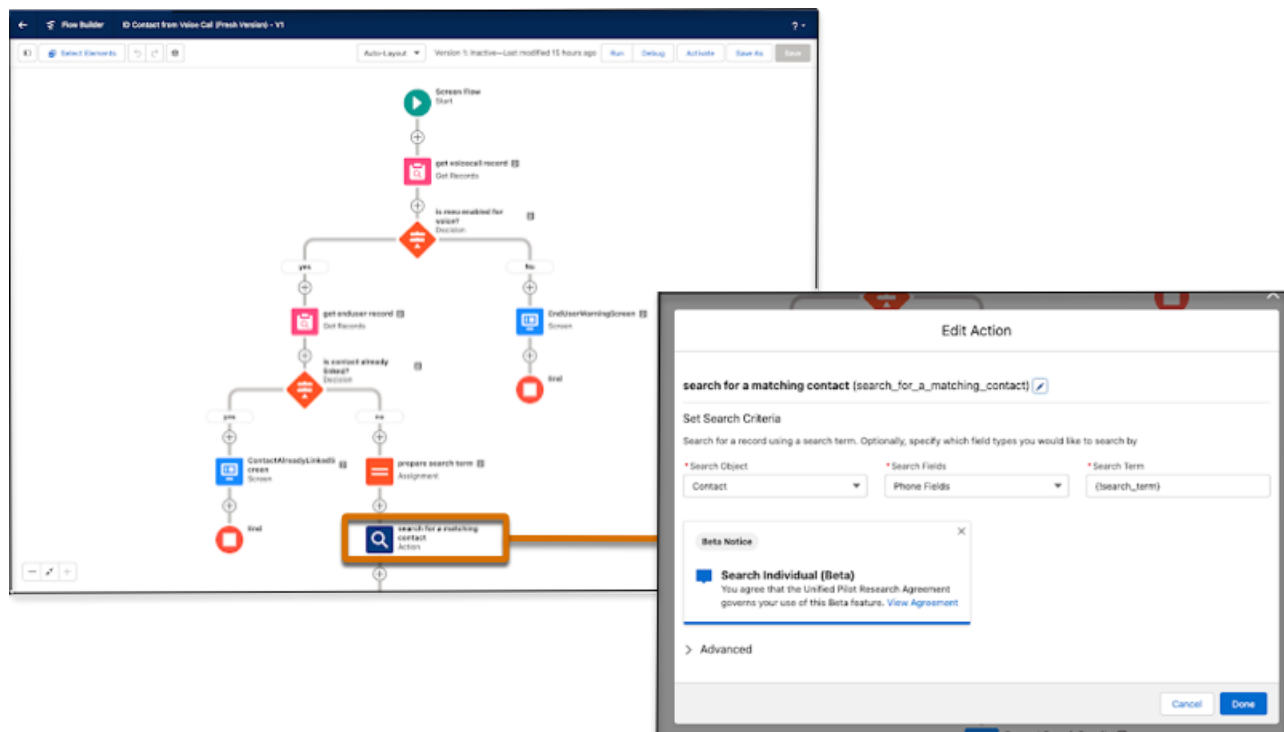
To improve service and data quality, add a screen flow that guides agents to find and link callers to leads, contacts, or employees. Let agents easily find and link contacts to active voice calls using the new Find Contact Associated with Voice Call flow template. Use the template to customize search criteria, record creation, creation screens, record match screens, and output parameters for other flows.

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 your telephony setup, turn on **Match Callers to End User Records**. To create a custom flow, clone a standard flow such as Find Contact Associated with Voice Call. Then build, test, and activate your flow.



SEE ALSO:

[Salesforce Help: Create a Screen Flow to Find and Link Callers to Records](#) (can be outdated or unavailable during release preview)

[Salesforce Help: Configure Caller ID for Your Contact Center](#) (can be outdated or unavailable during release preview)

[Salesforce Help: Add Screen Pops to Give Agents More Context about Conversations](#) (can be outdated or unavailable during release preview)

[Salesforce Help: Using Multiple Add Screen Pop Actions in an Omni-Channel Flow](#) (can be outdated or unavailable during release preview)

[Salesforce Help: Store Screen Pop Instructions in a Variable](#) (can be outdated or unavailable during release preview)

Track More AWS Cost and Usage Metrics with Service Cloud Voice

Run reports on cost and usage of Amazon Web Services (AWS) with Service Cloud Voice. Add three new fields to custom reports to gain insights on billed AWS service, usage quantity, and usage unit. Use quantity and unit together to understand measurements. Quantity and unit have replaced the Telephony Minute field.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions. Available in Salesforce orgs with this [telephony model](#):

- Service Cloud Voice with Amazon Connect

Report: Telephony Bill VG 2 New Telephony Bill VG 2 Report							
Total Records	Total Usage Quantity	Total Charge					
358	1,107,675	4.79					
	AWS Account Id	Contact Center Region	Billed AWS Service	Usage Unit	Usage Quantity	Usage Month	Currency
1	384797	Canada (Central)	Amazon DynamoDB	GB	0	7	US Dollar
2	384797	South America (São Paulo)	Tax	Events	0	10	US Dollar
3	384797	Asia Pacific (Singapore)	Amazon DynamoDB	GB	0	8	US Dollar
4	384797	Global	Tax	-	0	10	US Dollar
5	384797	Europe (Stockholm)	Tax	-	0	10	US Dollar
6	384797	Asia Pacific (Seoul)	Amazon DynamoDB	GB	0	7	US Dollar
7	384797	US East (N. Virginia)	Tax	-	0	10	US Dollar
8	384797	US West (Oregon)	Tax	-	0	10	US Dollar
9	384797	Asia Pacific (Singapore)	Tax	-	0	10	US Dollar
10	384797	Europe (Frankfurt)	Amazon DynamoDB	GB	0	8	US Dollar

SEE ALSO:

[Salesforce Help: Monitor Your Amazon Connect Usage and Billing](#) (can be outdated or unavailable during release preview)

[Salesforce Help: Generate a Salesforce Report for Amazon Connect Usage and Billing](#) (can be outdated or unavailable during release preview)

Update Service Cloud Voice After a My Domain Change

The URLs that Salesforce serves for your org change when you deploy enhanced domains in a sandbox or when you rename your Salesforce My Domain. If you have Service Cloud Voice with Amazon Connect as your telephony provider, you don't have to do anything because Salesforce automatically updates your orgs with the new URLs when you change your domain. Salesforce also upgrades your contact centers and Lambda functions to the latest available version. You can roll back the Lambda functions if you want to keep your customized versions. If you use Service Cloud Voice with Partner Telephony, you must update your configuration with the new URLs when you rename your My Domain.

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: If you have Service Cloud Voice with Amazon Connect as your telephony provider, when you rename your Salesforce My Domain, all of the contact centers and their AWS Lambda functions in the org will be updated to the latest available versions. If you have customized AWS Lambda functions and don't want them to be replaced with the latest, upgraded versions when you rename your My Domain, you can roll back the Lambda update by following the **Roll Back an AWS Lambda Function Update After Enhanced Domains is Enabled** steps in the Enhanced Domains and Service Cloud Voice - Spring '23 knowledge article.

If you have Service Cloud Voice with a partner telephony that's not Amazon Connect, when you rename your My Domain, the My Domain URL may change, causing certain Service Cloud Voice features to break. Update your configuration with the new URLs by following the **Support Enabled Enhanced Domains** steps in the Enhanced Domains and Service Cloud Voice - Spring '23 knowledge article.

SEE ALSO:

[Salesforce Knowledge Article: Enhanced Domains and Service Cloud Voice - Spring '23 \(can be outdated or unavailable during release preview\)](#)

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

Reach Your Customers Using High-Volume Outbound Calls

Don't waste time or money on another tool to handle your outbound calls to prospects and customers. Instead, contact millions of people with Amazon Connect Outbound Campaigns. For example, use this feature to remind customers about service appointments, deliveries, and payments due. Or use it to market new products and services.

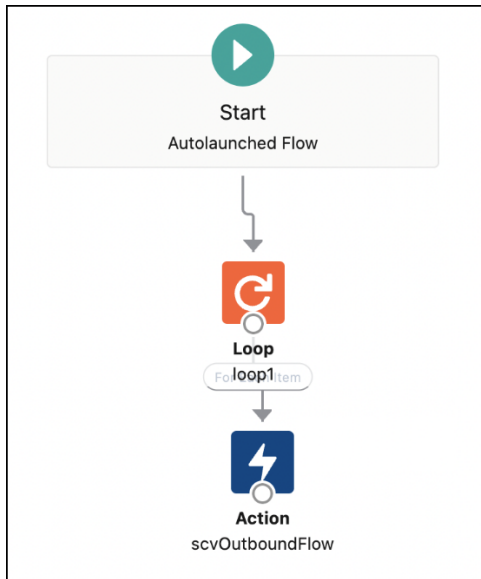
Where: This change applies to Lightning Experience in Enterprise and Unlimited editions. Available in Salesforce orgs with these [telephony models](#):

- Service Cloud Voice with Amazon Connect
- Service Cloud Voice with Partner Telephony from Amazon Connect

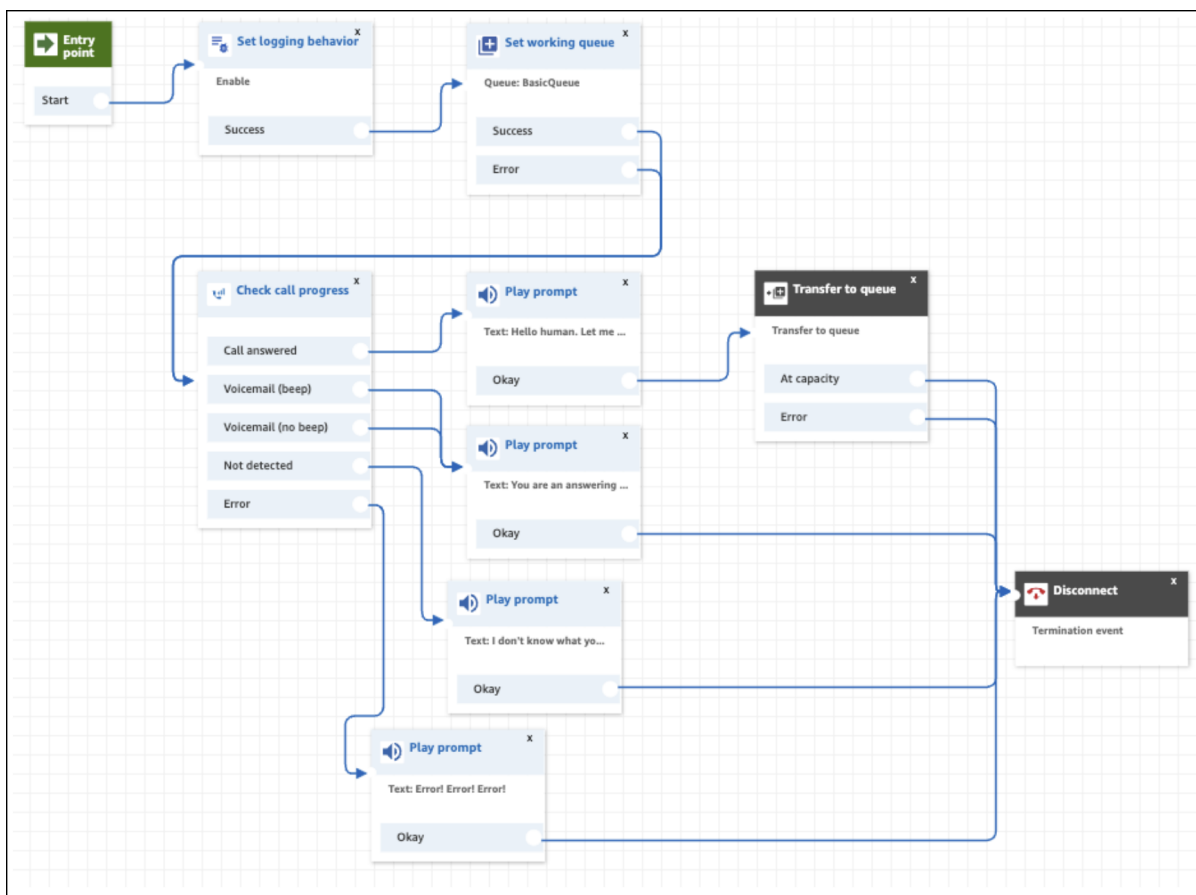
All models of Service Cloud Voice are available as an add-on license in Service and Sales Clouds.

How: Before you can use this feature, complete these prerequisites. Verify that the outbound campaigns feature is available in your Amazon Connect region. Enable outbound campaigns in your Amazon Connect instance. Also, contact Amazon Web Services Support to increase the service quota for outbound campaigns.

To make outbound calls, create an auto-launched flow that fetches the list of phone numbers to call and then makes the calls. To call a number, add an `scvOutboundCall` invocable action to the flow. To perform the invocable action for each phone number in the list, add a Loop element.



To route calls answered by customers, create a contact flow. If an answering machine picks up the call, configure the flow to leave an automated voicemail.



SEE ALSO:

[Salesforce Help: Reach Your Customers Using High-Volume Outbound Calls](#) (can be outdated or unavailable during release preview)

Authenticate Callers Using Their Voice

Stop asking endless security questions to authenticate your customers over the phone. Instead, use Voice ID powered by Amazon Connect. Using a caller's voice biometrics, Voice ID verifies the identity of the caller and detects fraud risk. An individual's unique voice properties make it difficult to spoof.

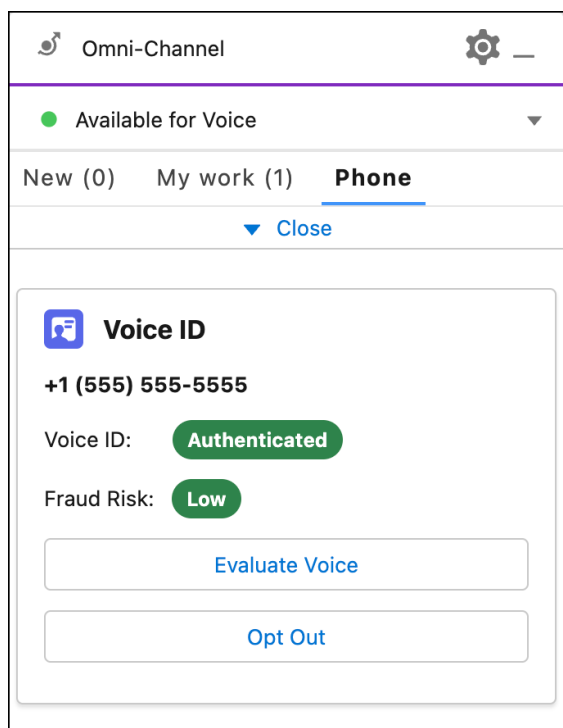
This change applies to Lightning Experience in Enterprise and Unlimited editions. Available in Salesforce orgs with this [telephony model](#):

- 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.

How: To set up Voice ID, add the Voice ID component to the Voice Call record page, Omni-Channel widget, or both. Also, ensure that the Voice ID blocks are added to the contact flows that route inbound, outbound, and transfer calls. By default, the Sample SCV Inbound Flow with Voice ID contains these blocks.

When on a call, click **More** in the Omni-Channel widget to view Voice ID. To enroll the caller in Voice ID, click **Enroll Caller**. Voice ID then evaluates the caller's voice to authenticate them and determine their fraud risk level.



SEE ALSO:

[Salesforce Help: Set Up Voice ID](#) (can be outdated or unavailable during release preview)

Build Your Voice Call Journeys with Modularized Flows in Amazon Connect

Customize voice call journeys with Amazon Connect contact flows for Service Cloud Voice. Start with an inbound, transfer, or outbound flow, then add subflows to determine how to handle voice calls. For example, add a callback subflow to an inbound flow to give callers the option to receive a callback rather than wait in queue for an agent to pick up.

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: Salesforce provides several out-of-the box sample flows and subflows you can use to shape your inbound, transfer, and outbound voice call journeys. After you upgrade your contact center to 10.0 or a later version, access the sample flows and subflows directly in Amazon Connect or import them into Amazon Connect from [GitHub](#).

Fewer Permissions Required to Manage Your Contact Center

To restrict permissions used internally after your contact center is provisioned, Service Cloud Voice no longer uses the ProvisioningRole IAM role to manage your contact center. Instead, it uses a new IAM role to add and remove users, queues, phone channels, queue mappings, and presence status mappings in your contact center. For Service Cloud Voice with Amazon Connect, the new role is AmazonConnectManagementRole. For Service Cloud Voice with Partner Telephony from Amazon Connect, the new role is SCVAmazonConnectManagementRole.

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.

When: This change will be available starting on February 11, 2022, when the Amazon Connect contact center version 11.0 is released.

How: To get the new role, upgrade your Amazon Connect contact center to 11.0.

SEE ALSO:

[Salesforce Knowledge Article: Service Cloud Voice Contact Center Updates \(can be outdated or unavailable during release preview\)](#)

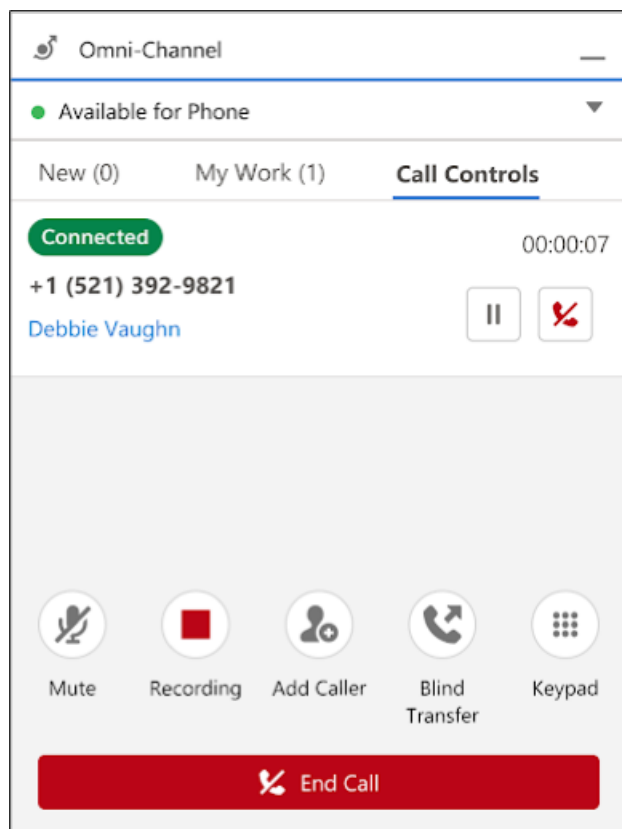
Increase Productivity with an Improved Softphone

Clearer button labels help you spot actions more easily and add others to calls with a click. Pesky callouts no longer obscure call buttons and details. Hear a dual-tone multi-frequency tone (DTMF) when numbers are pressed.

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 Estimated Wait Times Before Transferring Calls

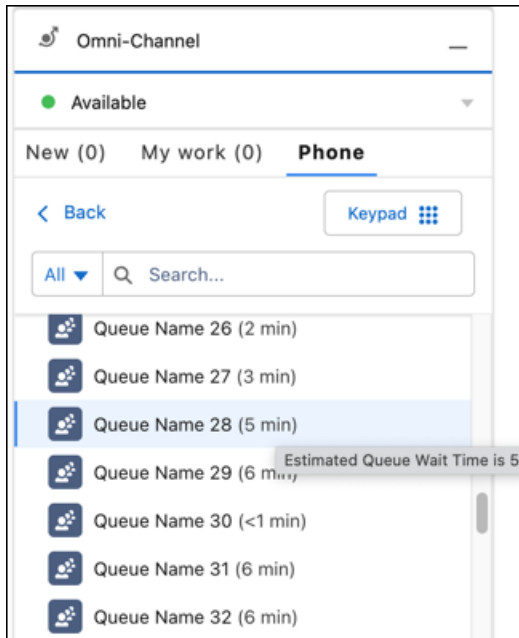
Agents can provide better service by seeing estimated wait times for partner queues before they transfer calls. Salesforce calculates estimated wait times only if 10 calls were made to the queue over the past 10 minutes. If this criterion isn't met, the estimated wait time isn't shown.

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.

Estimated wait time is automatically turned on for all queues that are mapped to Salesforce queues in both Service Cloud Voice with Amazon Connect and Service Cloud Voice with Partner Telephony from Amazon Connect.



SEE ALSO:

[Salesforce Help: Map Your Salesforce Queues to Telephony Provider Queues](#) (can be outdated or unavailable during release preview)

[Salesforce Help: Make Smarter Routing Decisions by Checking Agent Availability Queues](#) (can be outdated or unavailable during release preview)

[Service Cloud Voice for Partner Telephony Developer Guide: Configure Estimated Wait Times for Queues](#) (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:

- Support Einstein Next Best Action and auto-launched flows. Automatically trigger real-time actions in Service Cloud Voice based on intelligence signals detected during calls. The `ContactLensConsumerFunction` Lambda function was updated to get real-time transcriptions and intelligence signals generated from Contact Lens for Amazon Connect. The new `realtimeConversationEvents` API endpoint sends real-time conversation events generated from intelligence sources, such as Amazon Connect Contact Lens, to the agent console.
- Automate agent tasks by adding screen flows to screen pops. The new `TargetFlowName` field of the `PendingServiceRoutingInfo` object displays the API name and namespace prefix, if any, of the screen flow to open when work is routed to an agent via an

Omni-Channel flow. The `TargetObjectId` field, which was a required field, is now optional. The `TargetFlowName` or `TargetObjectId` field must be populated, but they can't be populated at the same time.

- Enable voicemail support to route recordings and transcriptions to agents for playback. Three new Lambda functions were introduced to support voicemails: `VoiceMailAudioProcessingFunction`, `VoiceMailTranscriberFunction`, `VoiceMailPackagerFunction`. See the [Enable Voicemail Support](#) page for more information. This change applies to Service Cloud Voice with Partner Telephony for Amazon Connect.
- Agents can see estimated wait times for a given queue before transferring a call. Estimated wait times are calculated by Salesforce or the telephony provider, depending on how the feature is configured. The `hasQueueWaitTime` field in the `CapabilitiesResult` object determines whether Salesforce or the telephony provider calculates the estimated wait time. See the [Configure Estimated Wait Time for Queues](#) page for more information.
- Extend your Omni-Channel softphone capabilities by creating and customizing voice call controls through the Voice Extension page in the Lightning App Builder. Add the `VoiceExtension` metadata type to the XML FlexiPage component definition file to create the `VoiceExtension` FlexiPage Metadata file. Extend your softphone even more by linking the Aura components to the Service Cloud Voice Toolkit API to perform call operations, such as muting a call, placing a call on hold, and starting a preview call. See the [Enable the Voice Extension Page in the Lightning App Builder](#) page for more information.

Einstein for Service

Einstein Conversation Mining harnesses the power of Einstein to save you from time-consuming transcript analysis. Einstein reviews your transcripts and identifies the top reasons customers contact you, highlighting the best ones for automation. Train your Einstein Classification models with additional fields (Pilot). Include encrypted fields when you train your Case Classification or Reply Recommendations models. Optimize and expand your Einstein Bots portfolio with new ways to work with Goals, and new rich content types and setup improvements for Enhanced Bots.

IN THIS SECTION:

[Einstein Classification](#)

Add fields other than Subject and Description when training your Einstein classification model (Pilot), and include encrypted fields when you build your Case Classification model.

[Einstein Reply Recommendations](#)

Include encrypted fields when you build your Reply Recommendations model.

[Einstein Bots](#)

Manage bot goals and monitor performance all in one place with the new Goals page. Expand your enhanced bot portfolio with cloning and routing improvements, and build richer enhanced bot conversations with support for more structured content types. Quickly build bot dialogs and templates based on your conversation insights with smart integrations with the new Einstein Conversation Mining feature.

[Einstein Conversation Mining \(Beta\)](#)

Einstein Conversation Mining helps you identify key automation opportunities using your Service Cloud conversation data. Build reports in Einstein Conversation Mining and let Einstein identify the top reasons customers contact you, which are the best opportunities to automate. Create a bot or dialog using your report results directly in the Einstein Bot Builder.

Einstein Classification

Add fields other than Subject and Description when training your Einstein classification model (Pilot), and include encrypted fields when you build your Case Classification model.

IN THIS SECTION:

[Add More Fields When You Train Your Classification Model \(Pilot\)](#)

Now you can train your model using custom text fields, which can contain more relevant case information. Add fields other than Subject and Description when training your Einstein classification model. Previously when you built a model, Einstein considered only the Subject and Description fields from closed cases.

[Use Encrypted Fields to Build Your Einstein Model \(Generally Available\)](#)

Now generally available, 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.

SEE ALSO:

[Einstein Release Notes](#)

Add More Fields When You Train Your Classification Model (Pilot)

Now you can train your model using custom text fields, which can contain more relevant case information. Add fields other than Subject and Description when training your Einstein classification model. Previously when you built a model, Einstein considered only the Subject and Description fields from closed cases.

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.



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: When you set up a model, after you define a segment and example cases, select training fields for your model from a list of available fields.

Add Input Fields

Select fields to train your classification model. [Learn more about configuring your model in Help.](#)

Select fields

Available

Description

Other Text Field

Engineering Req Number

Selected

Subject

Custom Text Field

Einstein uses input fields to improve your model and predictions. How many and which fields you select can impact model and prediction quality. For example, adding too many fields creates extra noise that interferes with prediction accuracy. Choose input fields that are related to the fields you want to predict. Work with your agents to learn which fields store useful case information.

Use Encrypted Fields to Build Your Einstein Model (Generally Available)

Now generally available, 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 Salesforce Shield and a platform upgrade.

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 use Salesforce Shield as their encryption provider.

Einstein Reply Recommendations

Include encrypted fields when you build your Reply Recommendations model.

IN THIS SECTION:

[Use Encrypted Fields to Build Your Reply Recommendations Model](#)

Now generally available, include encrypted fields when you build a predictive model for Reply Recommendations. Use artificial intelligence to save your agents time triaging and closing cases without compromising security.

Use Encrypted Fields to Build Your Reply Recommendations Model

Now generally available, include encrypted fields when you build a predictive model for Reply Recommendations. 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. Encrypted field support requires Salesforce Shield.

How: In Setup, when you build your Reply Recommendations model, encrypted LiveChatTranscript fields body and supervisor transcript body are automatically included in model training. Encrypted fields are available only with Einstein for Service for customers who use Salesforce Shield as their encryption provider.

Einstein Bots

Manage bot goals and monitor performance all in one place with the new Goals page. Expand your enhanced bot portfolio with cloning and routing improvements, and build richer enhanced bot conversations with support for more structured content types. Quickly build bot dialogs and templates based on your conversation insights with smart integrations with the new Einstein Conversation Mining feature.

IN THIS SECTION:

[Optimize Bot Performance with Goals Enhancements](#)

Goals enhancements make it easier to design and fine-tune bot conversations. Use the new Goals page to manage your goals and monitor bot performance, including completed goal counts. Plus, updates to the Dialogs page let you attach available goals to a dialog and view dialogs with associated goals at a glance.

Enhanced Bots

Improvements to the guided cloning experience make it easier than ever to clone an enhanced bot from a standard bot, so you can connect your enhanced bots to enhanced channels, send rich content, and more. Specify a default outbound Omni-Channel flow to take advantage of system routing functionality, like the Transfer to Agent system dialog. Receive a file and send an enhanced link to build richer conversational experiences.

Einstein Conversation Mining Integrations (Beta)

Save time and build confidence in your bot automation plan with Einstein Conversation Mining and Einstein Bots. Einstein Conversation Mining reviews your conversation transcripts, identifies the top reasons your customers contact you, and highlights which reasons are the best to automate. Access Einstein Conversation Mining reports directly in Einstein Bots and use that data to automatically create a bot or create dialogs for bots.

Use the Redirect to Variable Dialog for Enhanced Navigation

In addition to redirecting to a dialog, you can now redirect to an object variable. This way, you can offer your customers a few options for their redirect. For example, you can give your customers a few paths to move forward in the conversation, and then store that selection into an object variable. Instead of creating multiple redirect dialog steps depending on the answer, you can redirect to the variable directly.

Analyze Bot Performance with New Standard Reports

It's easier to analyze bot performance right out of the box with a new metric type and eight new prebuilt standard reports. Plus, a new Einstein Bot Reports Spring '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.

Bots Moved to the Setup Node for Added Visibility

Einstein Bots moved from Service Cloud into the Einstein section of the Setup page. As Einstein Bots expands to work with more clouds, this placement helps customers from other clouds find Einstein Bots faster.

Learn More about Change Sets and Einstein Bots in Salesforce Help

Requested by you: now you can learn about how to best move bots between sandbox and production using change sets. This way, you can better plan releases of new content to your bots without affecting your active bot.

SEE ALSO:

[Einstein Release Notes](#)

Optimize Bot Performance with Goals Enhancements

Goals enhancements make it easier to design and fine-tune bot conversations. Use the new Goals page to manage your goals and monitor bot performance, including completed goal counts. Plus, updates to the Dialogs page let you attach available goals to a dialog and view dialogs with associated goals at a glance.



Note: To bring you more functionality in the Bot Builder, we changed the way that we implement Goals. Previously, goals were created as invocable actions. Now goals are native to the Bot Builder, so you get completed goal counts and can manage your goals more flexibly. All goals created before Spring '23 are automatically migrated to the new goal type and are available on the Goals page.

As a result, we've ended support for special characters in goal display and API names. Bots that contain goals with special characters can't be saved or cloned. Review your existing goals for special characters. Delete affected goals, and then recreate them with names that contain only letters, numbers, and underscores.

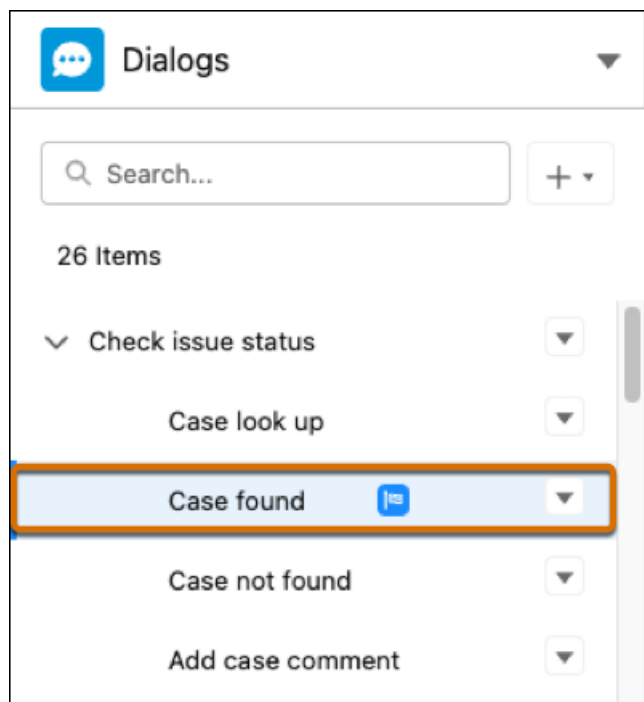
Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions. Setup for Einstein Bots is available only in Lightning Experience.

Why: The new Goals page is a one-stop shop for measuring and managing your goals.

Monitor bot performance with a list of all goals for your bot, details for each, and completed goal counts for the last 180 days. Edit goal names and associated dialogs, and delete goals from the same table. Plus, create a goal and add it to a dialog from the New Goal button.

On the Dialogs page, we added an icon to the Dialogs panel, so you can easily identify your dialogs with goals at a glance.

The Completed Goal action step in the Dialog Component Library was renamed to Goal so it's consistent throughout the builder. Use it to create a goal or add an available goal to your dialog.



How:

To add a goal to a dialog from the Goals page, click **New Goal**. You can add it to a dialog by selecting an associated dialog, and your goal is added to the end of the dialog. Or you can leave the field blank to add the goal to a dialog later.

To add a goal to a dialog from the Dialogs page, open the dialog where you want to add a goal. From the Dialog Component Library, drag the **Goal** action step onto the canvas. Then in the Step Properties panel, select or create a goal.

You can also edit or delete a goal from the dropdown in the Bot Goals table. When you edit a goal, you can rename it or move it to a different dialog.

SEE ALSO:

[Salesforce Help: Optimize Bot Performance with Goals \(can be outdated or unavailable during release preview\)](#)

Enhanced Bots

Improvements to the guided cloning experience make it easier than ever to clone an enhanced bot from a standard bot, so you can connect your enhanced bots to enhanced channels, send rich content, and more. Specify a default outbound Omni-Channel flow to take advantage of system routing functionality, like the Transfer to Agent system dialog. Receive a file and send an enhanced link to build richer conversational experiences.

IN THIS SECTION:

[Clone a Standard Bot as an Enhanced Bot More Easily](#)

Now it's easier to clone a standard bot as an enhanced bot, so you can upgrade your existing conversation designs with rich content, more flexible routing, and more. Previously, cloning a standard bot as an enhanced bot required several manual steps before and after cloning. Now the guided cloning experience does most of the work for you. We create Omni-Channel flows to route conversations to and from your new bot. We clone or replace dialogs that transfer conversations, and then we route them with Omni-Channel Flow. Plus, we map compatible context variables to Messaging objects and delete the Chat Key context variable, which is applicable to Chat channels only.

[Specify a Default Outbound Omni-Channel Flow for Your Enhanced Bot](#)

Use the new Outbound Omni-Channel Flow setting on the Bot Overview page to specify a default Omni-Channel flow for routing conversations from your enhanced bot. The bot uses this flow to route the Transfer to Agent dialog and the Transfer to Agent Next Step to an agent, queue, or skill, based on the business rules in the flow.

[Receive Inbound Files with an Enhanced Bot](#)

Enhanced bots can now receive files from your customers, so you can reduce agent handle time by collecting files before an agent joins the conversation. For example, a bot can request documentation related to an insurance or a reimbursement claim. Or a bot can prompt a customer for additional information about a possible issue, such as a screenshot of an error message. An agent can then review the files, which are attached to the messaging session and stored in the Files page of Setup.

[Send an Enhanced Link from an Enhanced Bot](#)

Enhanced bots now support enhanced links, so you can deliver richer bot conversations on enhanced channels. Send customers a web page link that's customized with your own image and link text, and customers can interact with it within the bot conversation.

[Connect Enhanced Bots to WhatsApp \(Generally Available\)](#)

Use an enhanced bot with enhanced Messaging for WhatsApp channels, now generally available in Messaging. Seamlessly route WhatsApp conversations to and from an enhanced bot with Omni-Channel Flow.

[Connect Enhanced Bots to Facebook Messenger \(Generally Available\)](#)

Use an enhanced bot with enhanced Facebook Messenger channels, generally available in Messaging as of November 2022. Seamlessly route Facebook Messenger conversations to and from an enhanced bot with Omni-Channel Flow.

Clone a Standard Bot as an Enhanced Bot More Easily

Now it's easier to clone a standard bot as an enhanced bot, so you can upgrade your existing conversation designs with rich content, more flexible routing, and more. Previously, cloning a standard bot as an enhanced bot required several manual steps before and after cloning. Now the guided cloning experience does most of the work for you. We create Omni-Channel flows to route conversations to and from your new bot. We clone or replace dialogs that transfer conversations, and then we route them with Omni-Channel Flow. Plus, we map compatible context variables to Messaging objects and delete the Chat Key context variable, which is applicable to Chat channels only.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions. Setup for Einstein Bots is available only in Lightning Experience.

How: To clone a standard bot as an enhanced bot, from the Bot Setup page, find the standard bot in the My Bots list and clone the bot. Enter a new bot name and API name. Under Select a type of bot, select **Enhanced: A bot that uses flows for more flexible routing**, and then complete the guided cloning experience.

SEE ALSO:

[Salesforce Help: Clone a Standard Bot as an Enhanced Bot \(can be outdated or unavailable during release preview\)](#)

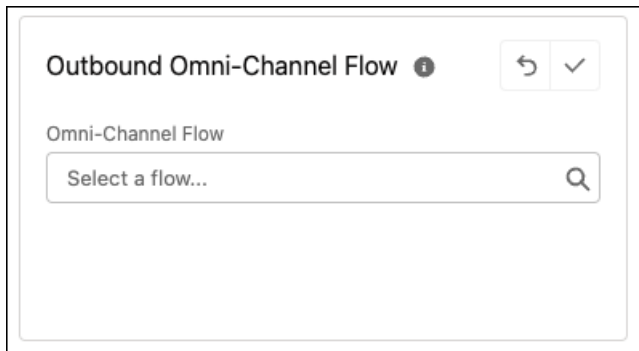
[Salesforce Help: About Cloning a Standard Bot as an Enhanced Bot \(can be outdated or unavailable during release preview\)](#)

Specify a Default Outbound Omni-Channel Flow for Your Enhanced Bot

Use the new Outbound Omni-Channel Flow setting on the Bot Overview page to specify a default Omni-Channel flow for routing conversations from your enhanced bot. The bot uses this flow to route the Transfer to Agent dialog and the Transfer to Agent Next Step to an agent, queue, or skill, based on the business rules in the 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.

How: To specify a default outbound Omni-Channel flow, on the Bot Overview page for your enhanced bot, edit the Outbound Omni-Channel Flow setting. You can select an active or inactive Omni-Channel flow, but the flow doesn't route conversations until you activate it.



To route conversations to other outbound Omni-Channel flows, you can still set up a transfer with the Set Routing Type dialog step.

SEE ALSO:

[Salesforce Help: Specify a Default Outbound Omni-Channel Flow \(can be outdated or unavailable during release preview\)](#)can someone remind me -- enhanced bots support direct transfers to other enhanced bots

Receive Inbound Files with an Enhanced Bot

Enhanced bots can now receive files from your customers, so you can reduce agent handle time by collecting files before an agent joins the conversation. For example, a bot can request documentation related to an insurance or a reimbursement claim. Or a bot can prompt a customer for additional information about a possible issue, such as a screenshot of an error message. An agent can then review the files, which are attached to the messaging session and stored in the Files page of Setup.

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 page, drag the **File** dialog step onto the canvas. In the Step Properties panel, in the File Interaction field, select **Receive File**. Then enter a message to the customer, specify a variable to save the file reference, and enter file upload success and optional failure messages.

The screenshot displays the Salesforce Bot Builder interface. On the left, three dialog steps are visible in a canvas:

- Question:** A pink header with a question mark icon. The message says: "Great! Before we proceed further, I want to let you know that we accept used Guitars. My records indicate that you have one. Would you be...". Below the message are two buttons: "Yeah sure 👍" and "May be later 🙅". At the bottom, it says "Save the response to Used Guitar Quote (Text)".
- File:** A blue header with a file icon. The message says: "Ok. Please upload your purchase receipt and a picture of your Guitar in a single message." Below the message, it says "Save the file to Inbound Attachment (Id List)".
- Message:** A blue header with a speech bubble icon. The message says: "Thanks! We'll get back to you with a quote. If you decide to trade in your guitar, you can apply the quote amount toward your purchase price of your..."

On the right, the **Step Properties** panel is open for the **File** step:

- * File Interaction:** A dropdown menu set to "Receive File".
- Action Details:** A section containing a message box: "Ok. Please upload your purchase receipt and a picture of your Guitar in a single message." with an edit icon.
- * Save File to Variable:** A dropdown menu set to "Inbound Attachment (Id List)" with a close icon.
- Upload Success Handling:** A section with the text: "When the file upload succeeds, the bot confirms with this message." Below it, a message box: "Great! Thank you for uploading the picture and receipt." with an edit icon.
- Upload Failure Handling:** A section with the text: "When the file upload fails, the bot prompts another file upload attempt with these message variations. We recommend providing additional information in the message, such as file type and size requirements."

SEE ALSO:

[Salesforce Help: Receive a File with an Enhanced Bot \(can be outdated or unavailable during release preview\)](#)

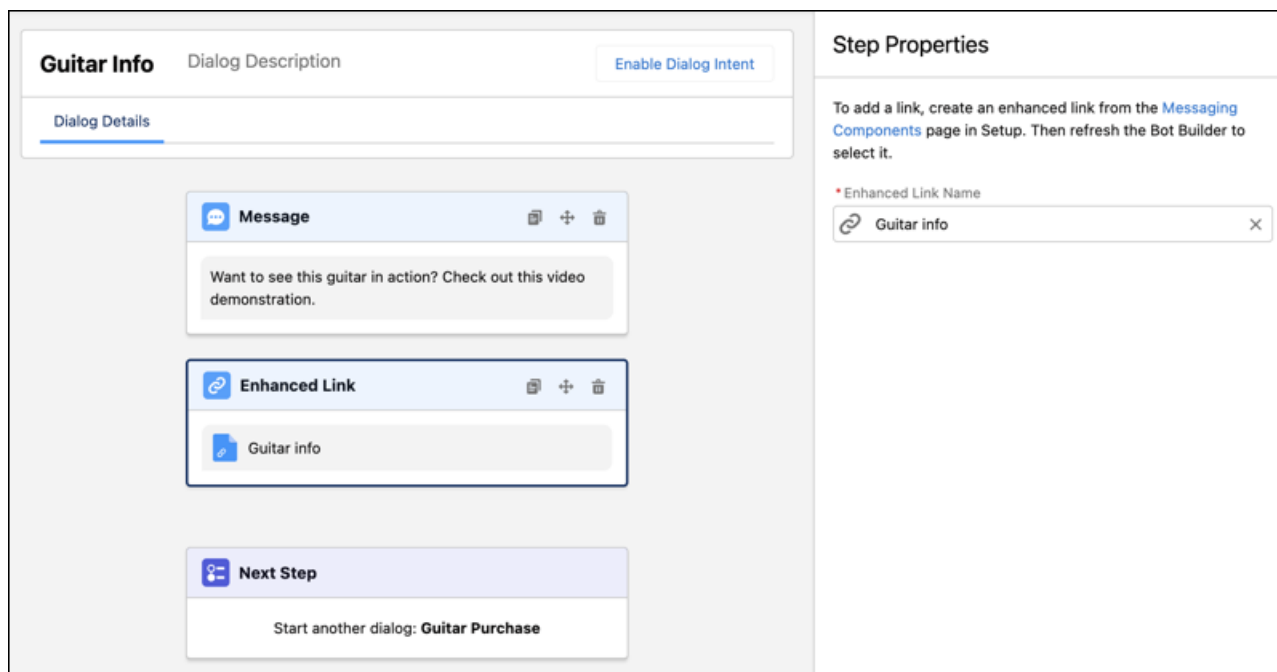
Send an Enhanced Link from an Enhanced Bot

Enhanced bots now support enhanced links, so you can deliver richer bot conversations on enhanced channels. Send customers a web page link that's customized with your own image and link text, and customers can interact with it within the bot conversation.

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: Create and manage enhanced link messaging components on the Messaging Components page in Setup.

To send an enhanced link from a bot, add it to a dialog. In the Bot Builder, on the Dialogs page, drag the **Enhanced Link** dialog step onto the canvas. Then select your enhanced link messaging component in the Step Properties panel.



SEE ALSO:

[Salesforce Help: Display an Enhanced Link in an Enhanced Bot \(can be outdated or unavailable during release preview\)](#)
[Send Structured Content with Messaging Components](#)

Connect Enhanced Bots to WhatsApp (Generally Available)

Use an enhanced bot with enhanced Messaging for WhatsApp channels, now generally available in Messaging. Seamlessly route WhatsApp 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 create enhanced WhatsApp channels starting on March 16, 2023.

How: Create an enhanced WhatsApp 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 WhatsApp \(Generally Available\)](#)

Connect Enhanced Bots to Facebook Messenger (Generally Available)

Use an enhanced bot with enhanced Facebook Messenger channels, generally available in Messaging as of November 2022. 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.

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](#)

Einstein Conversation Mining Integrations (Beta)

Save time and build confidence in your bot automation plan with Einstein Conversation Mining and Einstein Bots. Einstein Conversation Mining reviews your conversation transcripts, identifies the top reasons your customers contact you, and highlights which reasons are the best to automate. Access Einstein Conversation Mining reports directly in Einstein Bots and use that data to automatically create a bot or create dialogs for bots.

IN THIS SECTION:

[Create a Bot from Template Using Your Einstein Conversation Mining Data \(Beta\)](#)

Save time building a bot based on your conversation insights using Einstein Conversation Mining directly in Einstein Bots. After you build Einstein Conversation Mining reports, you can create a bot from a template based on the data in these reports. Select multiple contact reasons to create a bot that meets your customers' top requests. The resulting bot automatically includes utterances pulled directly from your conversation records.

[Build a Bot Dialog Using Your Einstein Conversation Mining Data \(Beta\)](#)

Use Einstein Conversation Mining directly in the Einstein Bot Builder to add high-value dialogs to your bots. When you add a dialog in the Bot Builder, you can select a dialog using results from your Einstein Conversation Mining reports. Excerpts related to the selected contact reason convert to utterances in your new bot dialog.

SEE ALSO:

[Einstein Conversation Mining \(Beta\)](#)

Create a Bot from Template Using Your Einstein Conversation Mining Data (Beta)

Save time building a bot based on your conversation insights using Einstein Conversation Mining directly in Einstein Bots. After you build Einstein Conversation Mining reports, you can create a bot from a template based on the data in these reports. Select multiple contact reasons to create a bot that meets your customers' top requests. The resulting bot automatically includes utterances pulled directly from your conversation records.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions. Setup for Einstein Bots is available only in Lightning Experience.



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

How: From the Einstein Bot setup page, click **New**. Select **Standard Bot**, and then click **Next**. Then, select **Start with your Data**.

Build a Bot Dialog Using Your Einstein Conversation Mining Data (Beta)

Use Einstein Conversation Mining directly in the Einstein Bot Builder to add high-value dialogs to your bots. When you add a dialog in the Bot Builder, you can select a dialog using results from your Einstein Conversation Mining reports. Excerpts related to the selected contact reason convert to utterances in your new bot dialog.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions. Setup for Einstein Bots is available only in Lightning Experience.



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

How: From the Bot Builder menu, click **Dialogs**. In the Dialogs panel, click **New**. Then click **Open Einstein Conversation Mining**.

Use the Redirect to Variable Dialog for Enhanced Navigation

In addition to redirecting to a dialog, you can now redirect to an object variable. This way, you can offer your customers a few options for their redirect. For example, you can give your customers a few paths to move forward in the conversation, and then store that selection into an object variable. Instead of creating multiple redirect dialog steps depending on the answer, you can redirect to the variable directly.

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 Rule Action dialog step, select **Redirect to Dialog**. Then, select **Variable** and choose your object variable.

Analyze Bot Performance with New Standard Reports

It's easier to analyze bot performance right out of the box with a new metric type and eight new prebuilt standard reports. Plus, a new Einstein Bot Reports Spring '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: This new metric type is available to add to reports.

- Failed Transfer Session Count: A count of sessions with at least one failed transfer attempt.


These new reports are available in the Einstein Bot Reports Spring '23 folder.

- Dialog Entry Points Last 30 Days: A count of modes by which users enter a given dialog in the last 30 days. Entry points include User Navigation, Rule Action, Dialog Next Step, and Intent Detection. Use this report to evaluate the effectiveness of your conversation design.
- Dialog Entry Points Today: A count of modes by which users enter a given dialog today. Entry points include User Navigation, Rule Action, Dialog Next Step, and Intent Detection. Use this report to evaluate the effectiveness of your conversation design.
- Goals Completed by Dialog Last 30 Days: A count of goals completed by dialog name and by bot in the last 30 days.
- Goals Completed by Dialog Today: A count of goals completed by dialog name and by bot today.
- Goals Completed by Goal Name (30 Days): A count of goals completed by goal name and by bot in the last 30 days.
- Goals Completed by Goal Name Today: A count of goals completed by goal name and by bot today.
- Sessions with Completed Goals (30 Days): A count of engaged sessions with at least one completed goal by goal name and by bot in the last 30 days. In an engaged session, a user sends at least one message or clicks at least one menu option or choice. Because they're initiated by a user, all sessions on third-party channels count as engaged sessions. A bot-to-bot transfer counts as a single engaged session for the initiating bot.
- Sessions with Completed Goals Today: A count of engaged sessions with at least one completed goal by goal name and by bot today. In an engaged session, a user sends at least one message or clicks at least one menu option or choice. Because they're initiated by a user, all sessions on third-party channels count as engaged sessions. A bot-to-bot transfer counts as a single engaged session for the initiating bot.

The behavior of the Goals Completed Today and Goals Completed Last 30 Days reports changed. These reports now iterate each time a goal is completed in a session. Previously, these reports counted only the first time a given goal was completed in a session.

How: In the App Launcher, find Reports. Under All Folders, select the **Einstein Bot Reports Spring '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 Spring '23.

 **Note:** Einstein Bots customers upgraded to the Spring '23 release before January 18, 2023 are missing the Einstein Bot Reports Spring '23 folder. After January 18, impacted customers can generate the folder by disabling and then enabling Einstein Bots in Salesforce. Learn more about workarounds to access the new Spring '23 reports outside of the Einstein Bot Reports Spring '23 folder in the related Knowledge article.

SEE ALSO:

[Salesforce Help: Navigate Einstein Bot Standard Reports \(can be outdated or unavailable during release preview\)](#)

[Knowledge Article: Einstein Bots Standard Reports Are Not Correctly Generated in Spring '23](#)

Bots Moved to the Setup Node for Added Visibility

Einstein Bots moved from Service Cloud into the Einstein section of the Setup page. As Einstein Bots expands to work with more clouds, this placement helps customers from other clouds find Einstein Bots faster.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions. Setup for Einstein Conversation Mining is available only in Lightning Experience.

Learn More about Change Sets and Einstein Bots in Salesforce Help

Requested by you: now you can learn about how to best move bots between sandbox and production using change sets. This way, you can better plan releases of new content to your bots without affecting your active bot.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions. Setup for Einstein Conversation Mining is available only in Lightning Experience.

SEE ALSO:

[Salesforce Help: Use Change Sets to Migrate Bots Between Orgs \(can be outdated or unavailable during release preview\)](#)

Einstein Conversation Mining (Beta)

Einstein Conversation Mining helps you identify key automation opportunities using your Service Cloud conversation data. Build reports in Einstein Conversation Mining and let Einstein identify the top reasons customers contact you, which are the best opportunities to automate. Create a bot or dialog using your report results directly in the Einstein Bot Builder.

IN THIS SECTION:

[Get to Know Einstein Conversation Mining \(Beta\)](#)

Use your Service Cloud conversation data and the power of Einstein to discover your customers' most common requests. With Einstein Conversation Mining, you can build reports based on specific audience details, using any field on your record. Einstein groups and ranks the requests, identifying the contact reasons that are most frequent and easiest to automate. Then, send the chat data from the contact reason over to Einstein Bots or into an intent set.

[Use Einstein Conversation Mining \(Beta\) with Einstein Bots Integrations](#)

Use Einstein Conversation Mining directly in the Einstein Bot Builder to quickly generate more effective bots and dialogs based on your report results. When you create a bot from a template, you can now dynamically select the included dialogs based on your top contact reasons. You can also add new dialogs based on report results directly into bots the same way you add new dialogs. Excerpts that are used to build the contact reasons convert into intent utterances you can use directly in your bot.

SEE ALSO:

[Einstein Release Notes](#)

Get to Know Einstein Conversation Mining (Beta)

Use your Service Cloud conversation data and the power of Einstein to discover your customers' most common requests. With Einstein Conversation Mining, you can build reports based on specific audience details, using any field on your record. Einstein groups and ranks the requests, identifying the contact reasons that are most frequent and easiest to automate. Then, send the chat data from the contact reason over to Einstein Bots or into an intent set.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions. Setup for Einstein Conversation Mining is available only in Lightning Experience.



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

Why: Einstein Conversation Mining replaces time-consuming transcript analysis that otherwise takes weeks. The ability to create multiple reports based on filters of the same data set helps you customize bots for different customers' needs.

How: From Setup, in the Quick Find box, enter *Einstein Conversation Mining*, and then select **Einstein Conversation Mining**. Then turn on Einstein Conversation Mining to opt in.

Einstein Conversation Mining requires at least 2,500 records with an identifiable contact reason. Einstein Conversation Mining excludes conversations without an identifiable contact reason, such as partial conversations with no business use case. Einstein Conversation Mining must have 2,500 records after any filters are applied to create a report.

Use Einstein Conversation Mining (Beta) with Einstein Bots Integrations

Use Einstein Conversation Mining directly in the Einstein Bot Builder to quickly generate more effective bots and dialogs based on your report results. When you create a bot from a template, you can now dynamically select the included dialogs based on your top contact reasons. You can also add new dialogs based on report results directly into bots the same way you add new dialogs. Excerpts that are used to build the contact reasons convert into intent utterances you can use directly in your bot.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions. Setup for Einstein Conversation Mining is available only in Lightning Experience.



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

SEE ALSO:

[Create a Bot from Template Using Your Einstein Conversation Mining Data \(Beta\)](#)

[Build a Bot Dialog Using Your Einstein Conversation Mining Data \(Beta\)](#)

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. Report on which skills are most requested in Expert Finder. And find the required skills for a swarm member more easily with searchable skills.

IN THIS SECTION:

[Collaborate on a Slack Swarm from Lightning Experience \(Slack Conversation for Salesforce Record\)](#)

Help relieve context switching pains and keep a record of swarm-related conversations with the Slack Conversations Lightning component. Agents can now send, receive, and view Slack messages related to a swarm from the Salesforce record itself. No more swivel-chairing or searching through Slack archives for critical information.

[Dive Deeper into Swarms with Expanded Reporting Functionality](#)

Unlock swarm insights with more granular lookup field support for Salesforce reports. Data teams can now report on a swarm's related records, such as fields on the swarm's related account or change request. And with object support now expanded, swarm reports are more comprehensive. Data teams can even report on a swarm member's work and work skills.

[Request the Right Swarm Member with Searchable Skills](#)

Make it easier for agents to find the right expert to add to swarm with skills that are searchable from Expert Finder. Agents save time scrolling through available skills and can instead search for exactly the right skill combination.

[Catch Up on Service Cloud for Slack App Features](#)

Use the Service Cloud for Slack app to swarm on customer issues, directly from Slack. New features include Slack conversations embedded in a Salesforce record, knowledge articles created from Slack messages, and Customer Service Incident Management record creation from Slack.

Collaborate on a Slack Swarm from Lightning Experience (Slack Conversation for Salesforce Record)

Help relieve context switching pains and keep a record of swarm-related conversations with the Slack Conversations Lightning component. Agents can now send, receive, and view Slack messages related to a swarm from the Salesforce record itself. No more swivel-chairing or searching through Slack archives for critical information.

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: Available to users in Spring '23.

Who: Users must have a permission set with these permissions: Connect Salesforce with Slack and Slack Service User. Specific features require more permissions.

How: Add the Slack Conversations Lightning component to record layouts for objects that support Swarming, such as Case, Incident, or Account. To use the component, users select a record with an associated Slack conversation. For example, select Swarm for Case #012345 to see the swarm conversation related to case #012345.

SEE ALSO:

[Salesforce Release Notes: Service Cloud for Slack App Release Notes \(can be outdated or unavailable during release preview\)](#)

Dive Deeper into Swarms with Expanded Reporting Functionality

Unlock swarm insights with more granular lookup field support for Salesforce reports. Data teams can now report on a swarm's related records, such as fields on the swarm's related account or change request. And with object support now expanded, swarm reports are more comprehensive. Data teams can even report on a swarm member's work and work skills.

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

Why: With object support now expanded to the Case, Account, Opportunity, Financial Deal, Incident, Problem, Change Request, and User objects, swarm and swarm member reports are more comprehensive. Now that swarm work skills are now available for reporting, build reports on skills requested in Expert Finder to level up training processes across your support organization.

Request the Right Swarm Member with Searchable Skills

Make it easier for agents to find the right expert to add to swarm with skills that are searchable from Expert Finder. Agents save time scrolling through available skills and can instead search for exactly the right skill combination.

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

How: When an agent starts a swarm with Expert Finder, they can search for and add swarm member required skills. Skill selections use And logic, meaning the swarm member must meet all selected skill requirements.

Catch Up on Service Cloud for Slack App Features

Use the Service Cloud for Slack app to swarm on customer issues, directly from Slack. New features include Slack conversations embedded in a Salesforce record, knowledge articles created from Slack messages, and Customer Service Incident Management record creation from Slack.

Where: This change applies to Lightning Experience in Professional, Enterprise, Performance, Unlimited, and Developer editions in Service Cloud. 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 \(can be outdated or unavailable during release preview\)](#)

Customer Service Incident Management

Communicate with internal stakeholders more effectively with broadcast Slack messages and broadcast alerts. Plus, automate your incident management processes with the new Flow Automation Pack for Incident Management.

IN THIS SECTION:

[Share Incident Updates Internally with Broadcast Slack Messages and Alerts](#)

Send mass communications to internal stakeholders and relevant teams with new broadcast types for Customer Service Incident Management. With broadcast Slack messages, incident teams save time manually keeping stakeholders in the loop and can send timely out-of-the-box progress reports to interested parties. Broadcast alerts let incident managers send disruptive in-app notifications that raise incident awareness for the right teams.

[Minimize Service Disruptions with the Flow Automation Pack for Incident Management](#)

Automate incident detection, cross-cloud multichannel notifications, and approval flows with the Flow Automation Packs for Incident Management available from Salesforce Labs on AppExchange. That way your team can manage the incident efficiently at various stages by determining the validity and scope of the incident, who needs to be involved in each stage, the status, and what happens at each stage.

Share Incident Updates Internally with Broadcast Slack Messages and Alerts

Send mass communications to internal stakeholders and relevant teams with new broadcast types for Customer Service Incident Management. With broadcast Slack messages, incident teams save time manually keeping stakeholders in the loop and can send timely out-of-the-box progress reports to interested parties. Broadcast alerts let incident managers send disruptive in-app notifications that raise incident awareness for the right teams.

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

How: From the Customer Service Incident Management setup page, enable and set up broadcast Slack messages and broadcast alerts. Broadcast alerts and broadcast Slack messages use templates and can't be customized. 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 Alerts \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Set Up Broadcast Slack Messages \(can be outdated or unavailable during release preview\)](#)

Minimize Service Disruptions with the Flow Automation Pack for Incident Management

Automate incident detection, cross-cloud multichannel notifications, and approval flows with the Flow Automation Packs for Incident Management available from Salesforce Labs on AppExchange. That way your team can manage the incident efficiently at various stages by determining the validity and scope of the incident, who needs to be involved in each stage, the status, and what happens at each stage.

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

Why: With digital transformation, companies are innovating and creating service offerings to grow and expand their business. As the integration of digital technology into all areas of a business increases, so does the impact of service disruptions to your customers and your support staff.

With Flow Automation Packs for Incident Management, you can use Flow Orchestrator to add automation to Customer Service Incident Management, accelerating resolution of customer incidents. The Flow Automation Packs also include post-resolution automation that removes any banners that you added, broadcasts to affected customers (through digital messaging channels like SMS, WhatsApp, and Facebook Messenger) that the incident is resolved, and closes any cases related to the incident automatically, thus freeing up agents from having to do these tasks manually.

How: You can get the Flow Automation Packs for Incident Management directly from Salesforce Labs on AppExchange.

SEE ALSO:

[AppExchange: Flow Automation Pack for Incident Management](#)

[AppExchange: Flow Automation Pack for Incident Management with Slack](#)

[AppExchange: Flow Automation Pack for Incident Management with Messaging](#)

Routing

Thanks to rock-star suggestions in Idea Exchange, Omni-Channel supervisors can view contact center metrics in the Omni-Channel Wallboard (pilot) and filter skills more precisely in Skills Backlog and Agent Summary tabs. To allow chats or calls to interrupt less pressing work items such as cases, Omni-Channel's routing logic can consider agents' primary and interruptible capacity (pilot). And if the Service Console isn't open, agents can receive a visual notification when Omni-Channel assigns them a new work item.

IN THIS SECTION:

[Interrupt Long-Running Work to Handle Time-Sensitive Work \(Pilot\)](#)

To reduce wait times and provide more responsive service, focus your agents on time-sensitive work items such as chats or voice calls. Designate longer duration work items such as cases as interruptible so that agents can accept time-sensitive work instead.

[Monitor Contact Center Health in the Omni-Channel Wallboard \(Pilot\)](#)

Give your supervisors insight into how well your contact center is managing the support workload. The wallboard shows key metrics to supervisors for the queues that they oversee.

[Find Work Items or Agents with the Right Skills](#)

Filter by skills more precisely in the Skills Backlog and Agent Summary tabs in Omni Supervisor. Previously when you filtered the skills column in the Skills Backlog tab, for example, it showed work items with any of the selected skills. Now you can list work items that require all the selected skills and quickly identify the skill sets that you need.

[Notify Agents About New Work Using Alerts](#)

Show agents that a new Omni-Channel work item is waiting when they're away from the Service Console. A browser alert appears so agents don't miss important work such as a customer call or chat when they're not looking at the Service Console. When agents click the alert, the Service Console opens so they can accept or decline the work item.

[Let Supervisors Manage Queues and Shrink Wait Times](#)

Allow supervisors to adjust queue assignments in Omni Supervisor and put agents where they're needed most. Previously supervisors required Salesforce admin privileges to reassign agents to other queues.

[Migrate Supervisor Configurations with Ease](#)

Instead of recreating Omni Supervisor configurations manually, use change sets or packages to capture and replicate them. For example, you can capture configurations and migrate them from sandbox to production in a snap.

[Improvements to Omni-Channel Flows](#)

Take advantage of these enhancements in Omni-Channel flows.

Interrupt Long-Running Work to Handle Time-Sensitive Work (Pilot)

To reduce wait times and provide more responsive service, focus your agents on time-sensitive work items such as chats or voice calls. Designate longer duration work items such as cases as interruptible so that agents can accept time-sensitive work instead.

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



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

How: To take part in this pilot, contact your Salesforce account executive.

Define work for a service channel as interruptible or with a setting on the Route Work action in an Omni-Channel flow. In Setup under Presence Configurations, configure the size of the primary capacity pool with time-sensitive work items versus the interruptible capacity pool. When an agent is assigned a work item that's in the primary pool, such as a chat, it's given priority over work that can be interrupted, such as cases.

Monitor Contact Center Health in the Omni-Channel Wallboard (Pilot)

Give your supervisors insight into how well your contact center is managing the support workload. The wallboard shows key metrics to supervisors for the queues that they oversee.

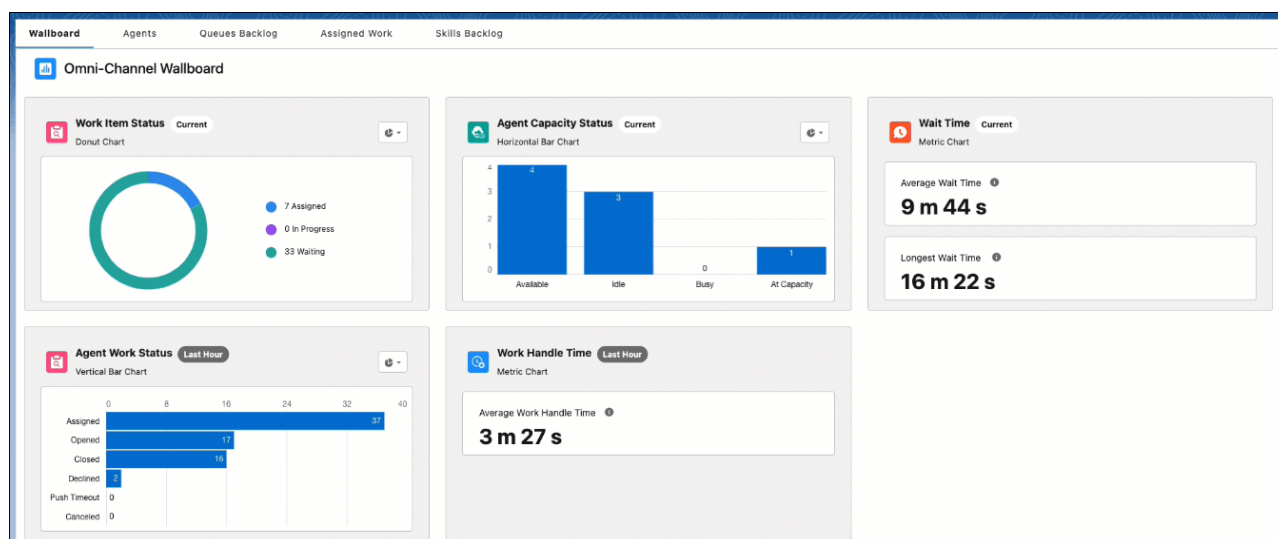
Where: This change applies to Lightning Experience in Professional, Enterprise, Performance, Unlimited, and Developer editions.



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

How: To take part in this pilot, contact your Salesforce account executive.

In Omni Supervisor, your supervisors open the Wallboard tab. Wallboard charts show agent work statuses and handle times for the last hour. In addition, supervisors see metrics about current work item status, agent capacity status, and maximum wait times. The wallboard's metrics reflect work items in Omni-Channel queues and not those items that are routed using skills-based routing.

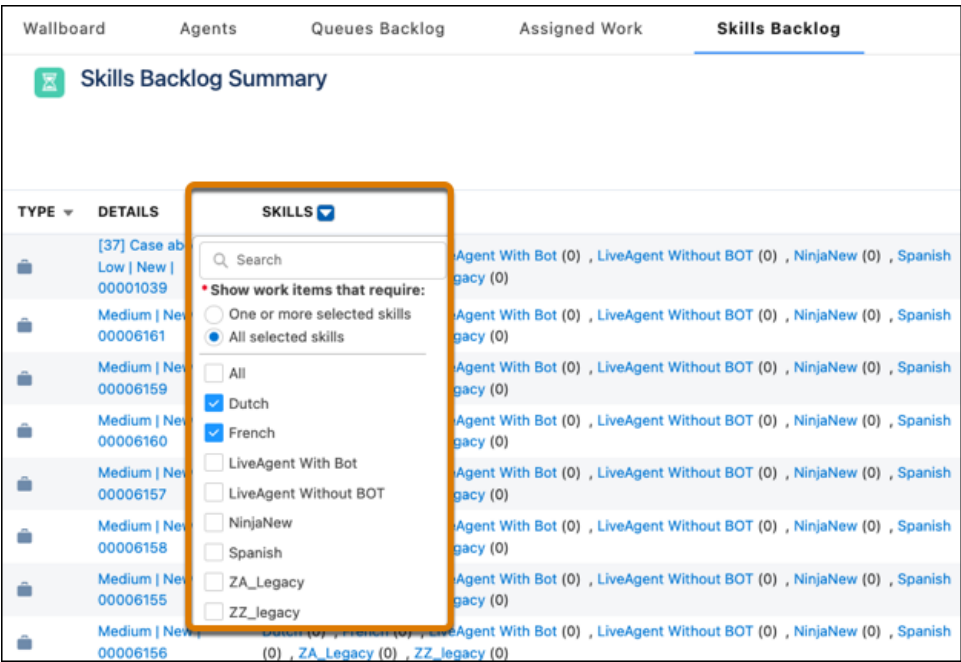


Find Work Items or Agents with the Right Skills

Filter by skills more precisely in the Skills Backlog and Agent Summary tabs in Omni Supervisor. Previously when you filtered the skills column in the Skills Backlog tab, for example, it showed work items with any of the selected skills. Now you can list work items that require all the selected skills and quickly identify the skill sets that you need.

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

How: On the Skills Backlog or Agent Summary tabs, select **One or more selected skills** or **All selected skills**. Then choose the skills of interest.

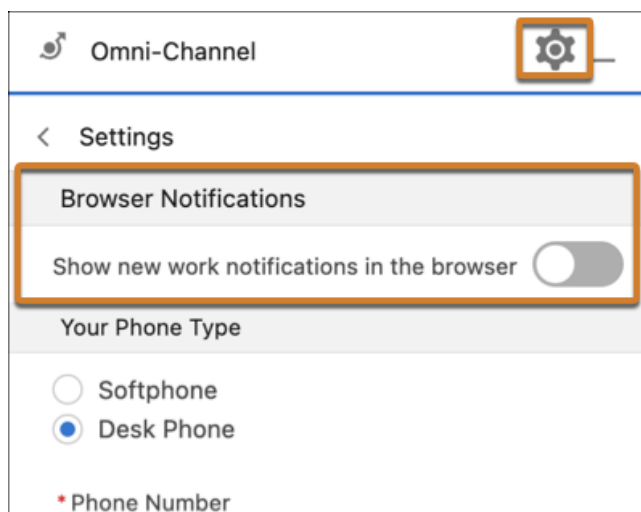


Notify Agents About New Work Using Alerts

Show agents that a new Omni-Channel work item is waiting when they're away from the Service Console. A browser alert appears so agents don't miss important work such as a customer call or chat when they're not looking at the Service Console. When agents click the alert, the Service Console opens so they can accept or decline the work item.

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

How: For agents to see notifications, turn on settings for notifications in the operating system and browser application. Then in the Omni-Channel utility, agents must click the Settings icon and turn on **Show new work notifications in the browser**. Previously, settings appeared in the Omni-Channel utility only if agents were assigned to Voice channels. Now all agents can adjust settings related to Omni-Channel including notifications in one place.



SEE ALSO:

[Salesforce Help: Work with Customers Using the Omni-Channel Utility \(can be outdated or unavailable during release preview\)](#)

Let Supervisors Manage Queues and Shrink Wait Times

Allow supervisors to adjust queue assignments in Omni Supervisor and put agents where they're needed most. Previously supervisors required Salesforce admin privileges to reassign agents to other queues.

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

How: In Setup, add the new Manage Queue Memberships permission to the permission set or profile for your supervisors. Supervisors can then use the Change Queues button on the Agent tab in Omni Supervisor. From the Queues Backlog tab, they can also reassign agents to the queues where help is needed.

Migrate Supervisor Configurations with Ease

Instead of recreating Omni Supervisor configurations manually, use change sets or packages to capture and replicate them. For example, you can capture configurations and migrate them from sandbox to production in a snap.

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

SEE ALSO:

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

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

Improvements to Omni-Channel Flows

Take advantage of these enhancements in Omni-Channel flows.

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

Why: These improvements make it easier to build effective Omni-Channel flows

- Previously the Route Work action in an Omni-Channel flow routed a single work record, but now you can route records in bulk. Specify a variable with one or more records to be routed. When you specify a collection of records and the flow can't find one of them, it rolls back the changes and routes none of them.
- Instead of selecting specific skills on the Add Skill Requirements action, specify them using a variable that represents a list of skills. Or in a Route Work action that routes to a bot, use a variable to specify the fallback queue. To use the same fallback queue for all routed items, you can select a single queue. To dynamically set the queue each time the flow routes a work item, use a variable.
- For repetitive tasks in your Omni-Channel flows, build smaller flows as Subflow elements and add them to your Omni-Channel flows. Previously Omni-Channel flows didn't support Subflows.

SEE ALSO:

[Salesforce Help: Advanced Routing with Omni-Channel Flows \(can be outdated or unavailable during release preview\)](#)

Knowledge

Unlock valuable article insights, change record types for translations, report on draft articles in CRM Analytics, and get updated Knowledge AppExchange packages.

IN THIS SECTION:

[Get Actionable Knowledge Insights](#)

Get insights on how to better serve your customers with the right content at the right time using out-of-the-box Knowledge reports and dashboards for CRM Analytics. Monitor how your published knowledge articles are performing, which internal articles are candidates for publishing externally, and who your top Knowledge contributors are.

[Change Knowledge Record Types for Translated Articles](#)

You can now change or add a record type for primary knowledge articles that have translations. With this change, knowledge articles can better meet your business processes, even as they change. Note that you can only change the record type of the primary article. The record type of existing translation versions remains unchanged. Subsequently created translations automatically inherit the new record type.

[Report on Draft Knowledge Articles in CRM Analytics](#)

Knowledge managers can now get a comprehensive view of all published and drafted knowledge articles from CRM Analytics. Previously only published articles were available for reporting, making it hard to get a full understanding of your company's knowledge base.

[Embody Knowledge Best Practices with Updated AppExchange Packages](#)

Leverage the power of Knowledge-Centered Service (KCS) methodology with the new Content Standard Checklist for Knowledge (formerly known as Article Quality Index, AQI) and updated Lightning Knowledge Feedback AppExchange packages. To align with KCS standards, changes include an app that tracks article quality audits, customizable questions, customizable feedback screens in Flow, attachment support for feedback, and feedback notifications.

[Quickly Add Context to Conversations with Knowledge Component Actions](#)

Send customers knowledge article URLs or snippets with the Knowledge Component Actions sidebar, available in Messaging for In-App and Web and enhanced Facebook Messenger channels. Save time by inserting pre-written information into conversations.

[Build a Lightning App with Knowledge UI APIs](#)

Use Knowledge UI API to retrieve and update Knowledge record data and metadata for mobile and custom web apps.

Get Actionable Knowledge Insights

Get insights on how to better serve your customers with the right content at the right time using out-of-the-box Knowledge reports and dashboards for CRM Analytics. Monitor how your published knowledge articles are performing, which internal articles are candidates for publishing externally, and who your top Knowledge contributors are.

Where: This change applies to all versions of Salesforce Knowledge in Production, Sandbox, and Development instances.

Who: CRM Analytics dashboards for Knowledge are available in the Service Console for all users with a Service Cloud license and don't require a CRM Analytics license. To make dashboard changes or to add new ones, a CRM Analytics license is required.

How: Install the Knowledge Dashboard Pack for CRM Analytics managed package from AppExchange.

SEE ALSO:

[AppExchange: Knowledge Dashboard Pack for CRM Analytics](#)

Change Knowledge Record Types for Translated Articles

You can now change or add a record type for primary knowledge articles that have translations. With this change, knowledge articles can better meet your business processes, even as they change. Note that you can only change the record type of the primary article. The record type of existing translation versions remains unchanged. Subsequently created translations automatically inherit the new record type.

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Report on Draft Knowledge Articles in CRM Analytics

Knowledge managers can now get a comprehensive view of all published and drafted knowledge articles from CRM Analytics. Previously only published articles were available for reporting, making it hard to get a full understanding of your company's knowledge base.

Where: This change applies to all versions of Salesforce Knowledge in Production, Sandbox, and Development instances.

How: Knowledge articles with a Draft publication status are automatically shown in CRM Analytics knowledge reports. To see only published articles, add a filter to exclude the Draft publication status.

Embody Knowledge Best Practices with Updated AppExchange Packages

Leverage the power of Knowledge-Centered Service (KCS) methodology with the new Content Standard Checklist for Knowledge (formerly known as Article Quality Index, AQI) and updated Lightning Knowledge Feedback AppExchange packages. To align with KCS standards, changes include an app that tracks article quality audits, customizable questions, customizable feedback screens in Flow, attachment support for feedback, and feedback notifications.

Where: This change applies to all versions of Salesforce Knowledge in Production, Sandbox, and Development instances.

How: Go to AppExchange to install the latest AppExchange package versions.

SEE ALSO:

[AppExchange: Content Standard Checklist for Knowledge \(formerly Article Quality Index, AQI\)](#)

[AppExchange: Lightning Knowledge Feedback](#)

Quickly Add Context to Conversations with Knowledge Component Actions

Send customers knowledge article URLs or snippets with the Knowledge Component Actions sidebar, available in Messaging for In-App and Web and enhanced Facebook Messenger channels. Save time by inserting pre-written information into conversations.

SEE ALSO:

[Quickly Add Context to Conversations with Knowledge Component Actions](#)

Build a Lightning App with Knowledge UI APIs

Use Knowledge UI API to retrieve and update Knowledge record data and metadata for mobile and custom web apps.

Where: This change applies to Salesforce Knowledge in Lightning Experience in production, sandbox, and development instances.

How: Use the newly supported Knowledge objects with UI API.

SEE ALSO:

[Salesforce Developer Guide: Developing with Salesforce Knowledge](#)

[Salesforce Developer Guide: Get Started with User Interface API](#)

Cases

Transition to Lightning threading so agents can see the email history for a customer's inquiry in the existing case. Streamline the case feed when agents reply with only new content. Use an external Gmail or Outlook server instead of Salesforce email services so you can meet compliance requirements. Log a call from the case record's Activities component as you do with other objects. Use a default No-Reply email address starting in Summer '23.

IN THIS SECTION:

[Prevent Duplicate Cases with Lightning Threading in Email-to-Case](#)

Lightning threading is a new Email-to-Case threading approach that matches incoming emails to cases using a combination of token- and header-based threading. This approach helps Email-to-Case find corresponding cases so that a new case isn't created when a related case exists.

[Disable Ref ID and Transition to New Email Threading Behavior \(Release Update\)](#)

This update turns off Ref ID threading and transitions to Lightning threading in Email-to-Case. With the new Email-to-Case threading behavior, incoming emails aren't matched using Ref IDs. Instead, they're matched using a new secure token in the email subject or body. If no match is found, we also check metadata that's contained in the email headers. This update replaces an update that was first made available in Winter '21 and has no scheduled enforcement date.

[Shrink Outgoing Emails and Include Only New Content](#)

Avoid reaching size limits for outgoing emails when they include new content only. When your agents reply via email, previous thread content is excluded.

[Meet Corporate Policy by Sending Case-Related Emails with Your Servers](#)

Allow your authorized Gmail or Outlook account to send case-related emails instead of using Salesforce email services. With this configuration, you can apply email filters or rules so that outbound emails comply with your business practices and email policies.

[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 in 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 '23, but we postponed the enforcement date to Summer '23.

[Log a Call from a Case's Activities Component](#)

Interact with case records just like any other Lightning Experience page. Agents can now log a call directly from the Activities component in Lightning Experience as with other Salesforce objects.

[Preserve an Email's HTML Style in a Case Feed](#)

To enhance the security and readability of emails that appear in a Case feed, we now use an iFrame to preserve the HTML content of the emails. While the collapsed email appears in plain text in your case feed, the expanded email appears in the font defined by its HTML.

Prevent Duplicate Cases with Lightning Threading in Email-To-Case

Lightning threading is a new Email-to-Case threading approach that matches incoming emails to cases using a combination of token- and header-based threading. This approach helps Email-to-Case find corresponding cases so that a new case isn't created when a related case exists.

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

Why: In Lightning threading, Email-to-Case inserts a token—a formatted string that meets Salesforce security standards—into the email body or subject of an outgoing email on a case. When customers respond, Email-to-Case looks for tokens to match incoming messages to related cases. If no match is found, Email-to-Case also checks metadata in the email headers. If the combination of token- and header-based threading can't identify a matching case, Email-to-Case then creates a new case.

How: If your org was created in Spring '23 or later, Email-to-Case uses Lightning threading. To enable it in existing orgs, in Setup under Email-to-Case settings, determine which threading model is in use.

- Ref ID threading. In Email-to-Case settings, if you see Insert thread ID in the email subject and Insert thread ID in the email body, you're using Ref ID threading. You can turn on Lightning threading via a [Release Update](#). The release update sets email preferences for threading tokens based on the corresponding Ref ID settings for email subjects and bodies.
- Header-based threading. If you made the transition from Ref ID to header-based threading or your org was created in Winter '21 through Winter '23, you're using one component of Lightning threading already: header-based threading. To add token-based threading, turn on Insert email threading token in email subject, Insert email threading token in email body, or both in Email-to-Case settings.

SEE ALSO:

[Knowledge Article: Disabled Ref ID and New Threading Behavior for Email-To-Case](#)

[Salesforce Help: Email-to-Case Threading \(can be outdated or unavailable during release preview\)](#)

[Release Updates](#)

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

This update turns off Ref ID threading and transitions to Lightning threading in Email-to-Case. With the new Email-to-Case threading behavior, incoming emails aren't matched using Ref IDs. Instead, they're matched using a new secure token in the email subject or body. If no match is found, we also check metadata that's contained in the email headers. This update replaces an update that was first made available in Winter '21 and has no scheduled enforcement date.

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

Why: To match emails to corresponding cases, Lightning threading combines token- and header-based threading. Similar to Ref ID threading, token-based threading inserts a formatted string into the email body or subject but is now created in a way that meets Salesforce security standards. When Lightning threading is enabled, new outbound emails don't include a Ref ID.

How: To review this update, from Setup, in the Quick Find box, enter *Release Updates*, and then select **Release Updates**. For Disable Ref ID and Transition to New Email Threading Behavior, follow the testing and activation steps.

Email-to-Case is backward compatible until you turn on Lightning threading. If Do Not Auto-Enable New Features is off, we set email preferences for threading tokens based on the corresponding Ref ID settings for email subjects and bodies.

If you use merge fields in email templates, replace Case.Thread_Id with the merge field Case.Thread_Token.

In your custom code, replace Cases.getCaseldFromEmailThreadId wherever it occurs with [Cases.getCaseldFromEmailHeaders](#), [EmailMessages.getRecordIdFromEmail](#), or a combination of both.

During the transition to Lightning threading, emails associated with your cases can contain both RefId and email threading tokens.

SEE ALSO:

[Knowledge Article: Disabled Ref Id and New Threading Behavior for Email-To-Case](#)

[Salesforce Help: Email-to-Case Threading \(can be outdated or unavailable during release preview\)](#)

[Release Updates](#)

Shrink Outgoing Emails and Include Only New Content

Avoid reaching size limits for outgoing emails when they include new content only. When your agents reply via email, previous thread content is excluded.

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

How: In Setup under Email-to-Case, turn on **Reply with new content only**.

Meet Corporate Policy by Sending Case-Related Emails with Your Servers

Allow your authorized Gmail or Outlook account to send case-related emails instead of using Salesforce email services. With this configuration, you can apply email filters or rules so that outbound emails comply with your business practices and email policies.

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

How: In Setup, under Email-to-Case, turn on **Send emails via external services**. After you verify the routing address, specify the external service, Gmail or Outlook, and connect the routing address to the external account for outgoing email services.

Email-to-Case Routing Address [Help for this Page](#)

A routing address is an email address that your customers can use to submit inquiries to your support team. Emails are converted to cases based on the routing address's settings.

Start by creating an email address in your email system, and then add it as a routing address here. Next, have your email system forward all inquiries to the email services address that Salesforce generates for you. [Learn More](#)

Email Address Edit

Routing Information ! = Required Information

Source: Email2Case

Routing Name:

Email Address:

Email Services Address:

Email Settings

Save Email Headers: ☐ [i](#)

Accept Email From:

Task Settings

Create Task from Email: ☐ [i](#)

Task Status:

Outbound Service Settings

External Service:

Routing Address Connection: [Connect to Outlook](#)

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 in 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 '23, but we postponed the enforcement date to Summer '23.

When: This update is required 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 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.

Log a Call from a Case's Activities Component

Interact with case records just like any other Lightning Experience page. Agents can now log a call directly from the Activities component in Lightning Experience as with other Salesforce objects.

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

Preserve an Email's HTML Style in a Case Feed

To enhance the security and readability of emails that appear in a Case feed, we now use an iFrame to preserve the HTML content of the emails. While the collapsed email appears in plain text in your case feed, the expanded email appears in the font defined by its HTML.

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

Shift Scheduling for Salesforce Contact Center

Assign agents where and when you need them. Use repeating patterns to create the shifts that you need for your contact centers. Then schedule agents for those shifts with shift scheduling tools available in Salesforce Contact Center.

IN THIS SECTION:

[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.

[Build Shifts Fast with Shift Patterns](#)

Save time and create multiple shifts at the same time with repeating shift patterns.

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 as a part of Salesforce Contact Center or as a part of Workforce Engagement.

Who: Users with the Shift Scheduling Planner permission set can view, create, and edit shifts, and they can manage shift schedules and 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 Video: Put the Right Agents on the Right Shifts at the Right Time with Shift Scheduling](#)

Build Shifts Fast with Shift Patterns

Save time and create multiple shifts at the same time with repeating shift patterns.

Where: This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions with Shift Scheduling or Workforce Engagement.

Who: Users with the Shift Scheduling or Workforce Engagement Planner permission sets can view, create, and edit shift patterns and use them to create shifts.

How: Create shift templates that define shift start times, durations, and job profiles. Create a shift pattern and set its length, such as 7 for a weekly pattern. In the pattern's related list, add shift pattern entries with a day position and a shift template. For example, to create 10 shifts each weekday and 5 on Sundays and Saturdays, add 10 entries for day positions 2 through 6 with the Weekday shift template. Add 5 entries for day positions 1 and 7 that use the Weekend shift template. In the shift manager, click **New from Pattern** to quickly create the shifts you need for the upcoming weeks.

New Shifts from Pattern

Select Shift Pattern
To create new shifts, select a shift pattern. Shift Patterns are made up of shift templates to define a set or recurring cycle of shifts.

• Shift Pattern
Weekly

Pattern Settings

• Scheduling Start
5 Dec 2022

• Scheduling End
☒ On a date
 • End Date
2 Jan 2023
☐ After a number of occurrences

• Status
Tentative

Service Territory
Hyderabad Center

Assigned Service Resource
Search Service Resources...

You're creating 144 shifts in Hyderabad Center between 05/12/2022—02/01/2023.

Cancel Create Shifts

If you specify a service resource who isn't available in the pattern, the shift is still created and assigned. For example, if an agent has a scheduled Resource Absence, the shift is still created and assigned to that resource.

SEE ALSO:

[Salesforce Help: Build Repeating Shift Patterns \(can be outdated or unavailable during release preview\)](#)

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

Feedback Management

Expand the distribution scope of surveys by using the Messaging Notification Flow action. Build a better custom survey UI by using Survey Response Connect APIs.

IN THIS SECTION:

[Distribute Surveys Through Recipient-Preferred Channels](#)

Send survey invitations to a recipient's preferred digital engagement channel, such as SMS, WhatsApp, or Facebook, by using the Messaging Notification Flow action.

[Build Better UIs for Custom Surveys](#)

Build better custom survey UIs by using the enhanced Survey Response Connect API to create basic surveys with multiple pages and branching logic. Insert content in questions or thank you messages. And use the survey details that the Survey Response Connect API generates to collect survey responses with greater flexibility.

[Easily Implement Feedback Management for Service Cloud](#)

Business scenarios help you bridge the gap between your organization's business capabilities and the solution needed to achieve your goals. Go through the Feedback Management for Service Cloud Implementation Guide to learn about common business scenarios in Service Cloud for using and implementing the Feedback Management features.

Distribute Surveys Through Recipient-Preferred Channels

Send survey invitations to a recipient's preferred digital engagement channel, such as SMS, WhatsApp, or Facebook, by using the Messaging Notification Flow action.


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

Who: To send surveys on SMS, WhatsApp, or Facebook, users need the Feedback Management - Starter license or the Feedback Management - Growth license.

How: In the Messaging Notification Flow action, include the survey developer name and other details.

Edit Action

Use values from earlier in the flow to set the inputs for the "Messaging Notification" core action. To use its outputs later in the flow, store them in variables.

Facebook Users (FacebookUsers) 

Set Input Values

A ₃ *Messaging Channel Unique Name	Facebook_US_100219472931913	
A ₃ *Messaging Template Unique Name	{!\$GlobalConstant.EmptyString}	
A ₃ Context Record ID		<input type="checkbox"/> Don't Include
A ₃ ConversationBroadcast Record ID		<input type="checkbox"/> Don't Include
A ₃ Recipient Phone Number		<input type="checkbox"/> Don't Include
A ₃ Recipient Record ID	{GetFBUsers.id}	<input checked="" type="checkbox"/> Include
A ₃ Survey Developer Name	Assessment_Survey_Messaging	<input checked="" type="checkbox"/> Include
Triggered Outbound Type		<input type="checkbox"/> Don't Include

SEE ALSO:

[Feedback Management: Send Surveys to Digital Engagement Channels with a Flow Action \(can be outdated or unavailable during release preview\)](#)

Build Better UIs for Custom Surveys

Build better custom survey UIs by using the enhanced Survey Response Connect API to create basic surveys with multiple pages and branching logic. Insert content in questions or thank you messages. And use the survey details that the Survey Response Connect API generates to collect survey responses with greater flexibility.

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

Who: To create basic surveys, users need the Feedback Management - Starter license or the Feedback Management - Growth license.

How: To create a basic survey on the UI, on the Surveys tab, click **New**, and then select **Basic Survey**.

SEE ALSO:

[Feedback Management: Create a Basic Survey \(can be outdated or unavailable during release preview\)](#)

Easily Implement Feedback Management for Service Cloud

Business scenarios help you bridge the gap between your organization's business capabilities and the solution needed to achieve your goals. Go through the Feedback Management for Service Cloud Implementation Guide to learn about common business scenarios in Service Cloud for using and implementing the Feedback Management features.

SEE ALSO:

[Feedback Management Implementation Guide for Service Cloud \(can be outdated or unavailable during release preview\)](#)

Work.com

Prepare your business, employees, and facilities. Respond to major events, such as the current COVID-19 crisis, with the apps and services in Work.com.

See the Work.com release notes for the latest updates: [Work.com Release Notes](#)

Other Salesforce Products and Services

Get the latest information on features from Customer Success Group, Heroku, IdeaExchange, Trailhead GO, and Salesforce Web3.

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 in Spring '23 include:

- Signature Success Plan: Signature Architecture Engagements
- Premier Success Plan: New and Refreshed Expert Coaching

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 to maximize your Salesforce success, check out our [Success Now Handbook](#).

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 offline content mode, customizable feed, topic recommendations, and Community Group improvements.

Trailhead GO supports 10 languages, including Italian and Spanish (Spain), and is available on iPhone, iPad, and Android devices.

- Android: [Trailhead GO at Google Play](#)
- iOS: [Trailhead GO at the App Store](#)

Salesforce Web3

With Salesforce Web3 you can create NFT collections and combine Web3 data with other Salesforce products to manage the NFT customer experience.

- Web3 Connect: Integrate Web3 data with Salesforce CRM capabilities to unlock real-time insights into new channels and audiences.
- NFT Management: Create, manage, and distribute NFT collections through audited smart contracts that you own, all with a few clicks.

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

How: To set up Salesforce Web3, contact your account executive to assess whether you meet the criteria to use it.

Release Updates

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

Every time a release update is created, it gets scheduled to be enforced in a future release. We announce each update and its schedule here as soon as that schedule is known, but occasionally, updates are postponed or canceled. If that happens, we let you know in the section that describes that specific release update.

Often, release updates provide a Test Run option so 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.

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 made available in Winter '23 and is enforced in Spring '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 personally identifiable information (PII) user record fields. You can also decide which custom and standard user fields are considered PII. This release 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.

Require Granular Flow Permissions for Experience Cloud Guest Users (Release Update)

In Winter '22, Salesforce discontinued the Run Flows permission for the Guest User and Experience Cloud External User profiles in new orgs. In Spring '23, Salesforce removes Run Flows from the Guest User profile in all orgs. The change improves site security by requiring explicit guest user permissions to run Flows. To avoid future access issues, update your sites to the new permission structure before the release update is enforced. This update was first available in Summer '22 and was scheduled for the beginning of Spring '23. However, enforcement is postponed to later in 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.

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.

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 the URLs that Salesforce hosts for your org. Consistent domain formats improve the user experience and standardize URLs for use in custom code and API calls. Also, with enhanced domains, your users can access Salesforce from browsers that block third-party cookies. Because this update affects application and login 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.

MFA Auto-Enablement: Find Out When and How Your Org Is Affected (Release Update)

As of February 1, 2022, Salesforce requires all customers to use multi-factor authentication (MFA) when accessing Salesforce products. To help customers meet this requirement, Salesforce is automatically enabling MFA for production orgs in several phases via the MFA Auto-Enablement Release Update. For orgs in the first phase, MFA is auto-enabled with Spring '23. For orgs in the second phase, MFA is auto-enabled with Summer '23.

Scheduled to Be Enforced in Summer '23

These updates are scheduled to be enforced in Summer '23. The list can include new, previously announced, and previously postponed release updates.

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.

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, along with 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.

Migrate Aura Sites to Google Analytics 4 (Release Update)

This update upgrades the JavaScript library for all your Aura sites from analytics.js to gtag.js in preparation for Google Analytics 4 (GA4). After you upgrade your JavaScript libraries, to complete the migration to GA4, manually update the Google Analytics Tracking ID for each Aura site from a UA-ID to a G-ID. To continue collecting analytics data for Aura sites after Google stops processing data through Universal Analytics properties on July 1, 2023, Experience Cloud requires that each Aura site uses the gtag.js library and a G-ID. Previously, Aura sites were permitted to use either the analytics.js library or the gtag.js library, and used a UA-ID to connect to Google Analytics. This update is first available in Spring '23.

Opt in for Event Log File Generation (Release Update)

You can now opt in or out of generating and delivering event log files. Previously, all instances received event log files automatically. With this update, event log files are only generated and delivered to instances that opt in to receive event log files. This update automatically disables event log file generation for Developer and Trial editions, and for instances that don't have the Event Monitoring add-on subscription by default. If you have Salesforce Shield or Salesforce Event Monitoring add-on subscriptions, you're opted in to receiving event log files by default. This update is available starting in Spring '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 and was scheduled to be enforced in Spring '23, but we postponed the enforcement date to Summer '23.

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.

Salesforce Platform API Versions 21.0 through 30.0 Retirement (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.

Security Enhancements for CSRF Tokens for Lightning Apps (Release Update)

This update enforces the generation of a different cross-site request forgery (CSRF) token for each Lightning app, which ensures that a token is used only in its intended context. The update also improves the handling for invalid and expired tokens. This update is new in Spring '23.

Use a Default No-Reply Address as System Address for Case Email Notifications (Release Update)

Configure a default No-Reply address from the Organization-Wide Addresses page in 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 '23, but we postponed the enforcement date to Summer '23.

Restrict Emails Sent from the Guest User (Release Update)

This update restricts organizations from sending emails from an unverified email address in the guest user record. Orgs with a verified organization-wide email address aren't affected by this release update, since the "sent from" email address defaults to the org's verified email address. This update is enforced with the Summer '23 release.

Scheduled to Be Automatically Enabled in Summer '23

The features related to these updates are scheduled to be automatically enabled, but not enforced, in Summer '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 Auto-Enablement: Find Out When and How Your Org Is Affected (Release Update)

As of February 1, 2022, Salesforce requires all customers to use multi-factor authentication (MFA) when accessing Salesforce products. To help customers meet this requirement, Salesforce is automatically enabling MFA for production orgs in several phases via the MFA Auto-Enablement Release Update. For orgs in the first phase, MFA is auto-enabled with Spring '23. For orgs in the second phase, MFA is auto-enabled with 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.

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.

Enforce Rollbacks for Custom Invocable Action Exceptions in REST API (Release Update)

This update preserves data integrity by rolling back transactions that end in an exception. When you execute a custom invocable action defined in Apex using REST API, the API doesn't change Salesforce data if that exception occurs.

Make Paused Flow Interviews Resume in the Same Context (Release Update)

With this update enabled, paused autolaunched flows resume in the same context as when they were paused. Also, for each flow that runs in API version 57.0 or later, user permission to run the flow is verified before an interview resumes. If your Process Builder processes launch flows that contain Pause elements, we recommend configuring those flows to run in API version 57.0 or later. Otherwise, this update can change the context of resumed interviews. Instead of resuming in system context without sharing, the process-launched flows resume in the context specified in the flow version properties. 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.

Prepare for the Japanese Katakana Style Change (Release Update)

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.

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. This update was first made available in Winter '23 and was scheduled to be enforced in Summer '23, but we postponed the enforcement date to Winter '24.

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 and is enforced in Spring '24.

Enforce RFC 7230 Validation for Apex RestResponse Headers (Release Update)

When this update is enabled, regardless of API version, REST response headers defined in Apex via the `RestResponse.addHeader(name, value)` method have the header names validated based on RFC 7230. The update is available starting in Spring '23.

Migrate from Maintenance Plan Frequency Fields to Maintenance Work Rules (Release Update)

The Frequency and Frequency Type fields on Maintenance Plan began 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. The retired frequency fields will impact work order generation. Complete the migration before Spring '24.

Scheduled to Be Enforced in Summer '25

These updates are scheduled to be enforced in Summer '25. The list can include new, previously announced, and previously postponed release updates.

Evaluate Criteria Based on Original Record Values in Process Builder (Release Update)

This update fixes a bug with the evaluation criteria in processes that have multiple criteria and a record update. This release update ensures that a process with multiple criteria and a record update evaluates the original value of the field that began the process with a value of null. This update was first made available in Summer '19.

No Scheduled Enforcement Date

These updates have no planned enforcement date at this time. The list can include new, previously announced, and previously postponed release updates.

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

This update turns off Ref ID threading and transitions to Lightning threading in Email-to-Case. With the new Email-to-Case threading behavior, incoming emails aren't matched using Ref IDs. Instead, they're matched using a new secure token in the email subject or body. If no match is found, we also check metadata that's contained in the email headers. This update replaces an update that was first made available in Winter '21 and has no scheduled enforcement date.

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.

Escape Expression Language Evaluations in <script> and <style> Contexts in Visualforce Pages and Components (Release Update)

This update has been canceled.

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.

Block Access to Public Apex Constructor in Managed Package from @AuraEnabled Method (Release Update)

This update has been canceled.

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."

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](#).