

# Salesforce Release Notes

Salesforce, Summer '23

Save time and automate faster







# CONTENTS

<b>SALESFORCE SUMMER '23 RELEASE NOTES</b>	<b>1</b>
How to Use the Release Notes	4
Get Ready for the Release	5
Release Note Changes	5
How and When Do Features Become Available?	19
Supported Browsers	79
Salesforce Overall	81
Analytics	97
Commerce	123
Customization	149
Data Cloud	170
Deployment	181
Development	181
Einstein	256
Enablement and Guidance	258
Experience Cloud	270
Field Service	295
Hyperforce	313
Industries	314
Marketing	494
Marketing Cloud Account Engagement	494
Mobile	500
Revenue	511
Sales	514
Salesforce CMS	581
Salesforce Flow	586
Salesforce for Slack Integrations	609
Salesforce Starter	609
Security, Identity, and Privacy	609
Service	643
Work.com	719
Other Salesforce Products and Services	719
Release Updates	720
Legal Documentation	725



# SALESFORCE SUMMER '23 RELEASE NOTES

The Summer '23 release helps you save time, automate faster, and personalize each customer interaction through hundreds of new innovations.

## IN THIS SECTION:

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

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

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

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

### [Release Note Changes](#)

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

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

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

### [Supported Browsers](#)

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

### [Salesforce Overall](#)

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

### [Analytics](#)

Analytics enhancements include new and updated features for Lightning reports and dashboards, CRM Analytics, analytics apps, Einstein Discovery, and Tableau.

### [Commerce](#)

Commerce Cloud enhancements include new and updated features for B2B and D2C Commerce, Omnichannel Inventory, Salesforce Order Management, and Salesforce Payments.

### [Customization](#)

Use the new Salesforce Connect adapter for GraphQL to connect external sources that expose their capabilities via GraphQL. Assign field-level security for permission sets instead of profiles.

### [Data Cloud \(Formerly Customer Data Platform\)](#)

Ingest, harmonize, unify, analyze, and stream data with Data Cloud, previously called Customer Data Platform. Explore expanded functionality for getting organized and segregate data based on your business needs. Merge and analyze data using existing segment rules and common elements.

### [Deployment](#)

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

### Development

Whether you're using Lightning components, Visualforce, Apex, platform events, 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 Decision Optimization (beta) to refine your Einstein recommendations based on your business rules, objectives, and constraints. Spin up propensity models for common use cases across Industries clouds with Scoring Framework, now generally available. Easily add prebuilt functionality to multiple bots with Bot Blocks (beta). Include emails and related transcripts to build better Einstein Conversation Mining reports.

### 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

Personalize your LWR sites with Expression-Based Visibility and device-based visibility settings. Discover an abundance of new and improved LWR components, including Tabs, Logo, and Knowledge Article. Migrate your Aura sites to Google Analytics 4. And enjoy a boost in performance and productivity with improved custom domains, component caching, site navigation, and more.

### Field Service

Create schedules using robust features with the Enhanced Scheduling and Optimization Engine, available for new users by default. Or, easily switch to the new engine for all service territories for improved scalability, performance, and scheduling quality. Save time by letting mobile workers set follow-up appointments in the app. Expand how mobile users get work done, with custom dashboards and images that can be annotated and uploaded even when offline. Supercharge workflows with the reimaged tablet experience and updated related list UI. Enable customers to track service outcomes to easily assess the compliance of service contracts. Ensure timely maintenance by planning ahead for potential blockers. Route work to the best agent for the job. Enhance the customer experience by enabling customer-driven live sessions and messaging with Visual Remote Assistant.

### Hyperforce

Hyperforce is the next-generation Salesforce infrastructure architecture, built for the public cloud. It enhances Salesforce applications' compliance, security, privacy, agility and scalability, and gives customers more choice over data residency.

### Industries

Industries solutions shape Salesforce to the needs of your business, reducing the need for you to customize things yourself. Schedule test drives and service appointments with Automotive Cloud. Calculate order prices online and plan store visits with Consumer Goods Cloud. Actionable Segmentation is now generally available in Financial Services Cloud. Schedule home healthcare visits with Health Cloud. Manage lifecycles of awarded grants with Grantmaking for Public Sector Solutions and Nonprofit Cloud. Use CSV files to upload data to Net Zero Cloud. Automate selection of members for tier change and tier upgrade assessments with Loyalty Cloud. Orchestrate end-to-end warranty lifecycles with Manufacturing Cloud. Build ship and debit programs with Rebate Management. We also have plenty of changes for Education Cloud, Nonprofit Cloud, Media Cloud, Industries common features, and many 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

Use external actions as completion actions on Account Engagement assets. Account Engagement Optimizer is now generally available and includes monitoring for critical configuration issues. Plus, get retroactive activity data when prospects opt in to tracking.

### Mobile

Salesforce Mobile App Plus is now generally available. The operating system requirements for the Salesforce mobile app have changed. Mobile Publisher for Experience Cloud apps can now require app updates natively and with a 15-day grace period.

### Revenue

Bundle your products and services in Subscription Management, and decrease subscription quantities. Price and bill annually, configure more discounts, and turn off invoicing and payment features in Subscription Management. Create quote templates faster in Salesforce CPQ Plus.

### Sales

Sales teams can do their jobs faster and more effectively with these new products and feature enhancements. Allocate revenue at a more granular level for complex sales deals with opportunity product splits, and use opportunity product splits in reports and forecasts. Manage the timing of cadence steps and see cadence usage data in Sales Engagement. Share call transcripts, insights, and action items with more users in Einstein Conversation Insights, which now support more languages and voice providers. Arm your sales teams with key information from the Sales Rep Command Center in Revenue Intelligence. And get more insights into sales forecasts with charts and external data in custom columns.

### Salesforce CMS

Create workflows and streamline approvals in enhanced CMS workspaces. Manage CMS content from the improved content detail page. Manage unlimited content with Salesforce CMS. Create enhanced CMS channels to associate with enhanced CMS workspaces.

### 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

Multi-factor authentication (MFA) and enhanced domains rollouts continue. Track file activities with File Event for Event Monitoring. Automate processes for Security Center data with flows. Build native identity experiences with new and improved Headless Identity APIs. And host preference forms via your own Salesforce instance.

### Service

Transform conversation data into service insights and build bot intents with Einstein Conversation Mining (beta). Update replies with on-demand template creation in Reply Recommendations. Add prebuilt functionality to multiple bots with Bot Blocks (beta). Give your customers and partners advanced self-service automation with the Service Catalog. Record and send voice messages in enhanced Messaging channels. Add business hours to Messaging for In-App and Web. Use flows to link leads, contacts, employees and person accounts to interactions in all channels with Individual-Object linking. Create broadcast Slack messages with custom templates for Customer Service Incident Management. Get survey responses from unauthenticated guest users via APIs in Feedback Management.

### Work.com

Prepare your business, employees, and facilities. Respond to major events, such as the current COVID-19 crisis, with the apps and services in Work.com.

### Other Salesforce Products and Services

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

### Release Updates

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

### Legal Documentation

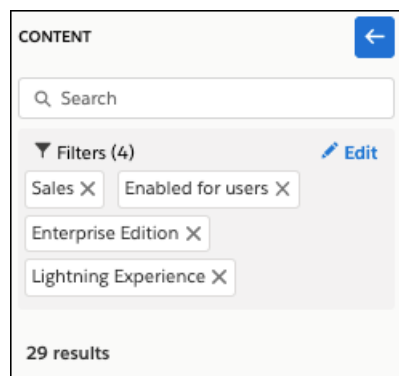
We made seasonal updates to Salesforce Legal Documents.

## How to Use the Release Notes

---

The release notes are 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 to you.



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 #Summer23Feedback.
- **Feedback forms**—As you're working with our documentation in Salesforce Help, release notes, or developer guides, look for the feedback button 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.

# Get Ready for the Release

---

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

## What's New This Release

- [Release Milestones](#). See key dates for the release.
- [Release Overview Deck \(ROD\)](#). Create internal training for your users, review setup screens, and learn how to use features.
- [Release Matrix](#). Quickly see which features immediately affect your users.
- [Summer '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.
- [Summer '23 Release Website](#). Check out the new features.
- [Summer 23 Release Highlights Module](#). Get the release Trailhead badge.
- [Release in a Box](#). Use this kit to prepare for the new release and to present it to your 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.

## Release Note Changes

---

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

### August 14, 2023

#### **New Connect in Apex Classes**

Added the `searchProducts` method to the new `ConnectApi.CommerceSearchConnectFamily` class. This method was incorrectly documented in the `ConnectApi.CommerceSearch` class.

#### **Grow Your High-Value Segments with Einstein Lookalikes**

Added a Who section to indicate that this feature is available only with a Data Cloud license.

#### **Enhance Product Descriptions with Einstein Generative AI**

Added a release note announcing that you can enhance product descriptions using Einstein GPT.

**Add New Object Permissions to Custom Permission Sets in Data Cloud**

Added a release note announcing the addition of object permissions in Data Cloud, and the need to include them in any custom permission sets.

**New and Changed Objects**

Added release notes for the following changes in Subscription Management. Field values were added to the Asset and Quote Line Item objects to allow an annual subscription to be included and priced in a quote, and to allow renewal of an annual subscription. Added a field value on the ProductSellingModel object to reflect the capability to price a subscription annually in Subscription Management. Added values to fields on the following objects to reflect capabilities for product add-ons: ProductRelatedComponent and ProductRelationshipType. Added a field value on the PriceAdjustmentSchedule object to reflect the capability to discount longer subscriptions.

**Business Rules Engine**

Updated the supported editions in all Business Rules Engine release notes to remove references to the Professional edition.

## August 7, 2023

**New and Changed Objects**

Added a release note about the new BroadcastCommAudience and BroadcastCommunication objects.

**New and Changed Objects**

Added a release note about the new value LearningItemSubmission in the SubjectEntityType field of the SurveySubject object.

**Changed AI Accelerator Metadata Types**

Announced the fields associated with the AIUseCaseDefinition, AIUseCaseModel, and AIFeatureExtractor metadata types.

**Base Component lightning-input Internal DOM Is Changing in Winter '24 on page 192**

Added a release note announcing upcoming changes to lightning-input base Lightning component.

**Meeting Studio is Being Retired**

Updated the date that Meeting Studio is being retired.

**Accelerate Self-Service Reorders with a Commerce Reorder Portal on page 136**

Removed a note which stated that customers should contact Salesforce customer support to enable the Commerce Reorder Portal feature.

**View Knowledge Article Event Data in Event Monitoring Analytics Apps**

Added a release note announcing availability of Knowledge Article View Event data in the Event Monitoring Analytics App.

## July 31, 2023

**Use Amazon SageMaker Models with Data Cloud to Drive Personalization (Generally Available) on page 176**

Added a release note announcing the GA release of Bring Your Own Model with Amazon SageMaker.

## July 24, 2023

**New and Changed Objects**

Added a release note about the new value Assessment and removal of value Form in the SurveyType field of the Survey object.

**Manage Provider Contracts with Provider Network Management**

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



**Teach Your Bot New Languages More Easily with the Cross-Lingual Intent Model (Beta)**

Added a release note announcing the new cross-lingual intent model beta for Einstein Bots.

**AnalyticsBotSession Object Was Removed**

Added a release note announcing the removal of the AnalyticsBotSession object.

**Get Records from Data Cloud Objects in Flow Builder**

Added details about when this functionality is available and removed data lake objects and calculated insight objects, which aren't included in the release.

**Choose When to Process Calculated Insights**

Removed this release note because the feature isn't generally available.

**Show Salesblazer Content in the Guidance Center**

Added a release note announcing the Salesblazer content section in the Guidance Center.

**Configure Stack Depth of Chained Queueable Jobs (Beta)**

Added information about testing queueable Apex jobs.

**Organize Your Data with Data Spaces**

Added a release note announcing the data spaces feature.

**Quickly Create Full Sandboxes (Generally Available)**

Due to technical issues, we're delaying the release of this feature until further notice.

## July 18, 2023

**Financial Services Cloud Installation, Quick Start, and Update Guides**

Announced that the Financial Services Cloud Installation Guide is now in Salesforce Help, the Quick Start Guide is merged into the Admin Guide, and the Update Guide is retired.

**Add More AWS Services to Service Cloud Voice with Amazon Connect**

Added a release note about the new Service Cloud Voice Additional AWS Services add-on license.

**New and Changed Business Rules Engine Metadata Types**

Added a release note about the new `shouldShowExternally` field on the `ExpressionSetDefinitionVersion` subtype and `ExpressionSetCustomElement` subtype on the `ExpressionSetStep` subtype of the `ExpressionSetDefinition` metadata type.

**Metadata API**

Added a release note about the new `DynamicFormsSettings` metadata type.

**Discover the New Lightning Web Components Developer Guide**

Added a release note about the new Lightning Web Components Developer Guide.

**Reduced Limit for Number of Actions in a Boxcar Request**

Added a release note about a change in the number of Aura actions allowed in a request.

**Tooling API New and Changed Objects**

Added a release note about the new `PaymentGatewayProvider` Tooling API object.

**Deliver Products and Services with Service Catalog (Generally Available July 18, 2023)**

The editions table was updated to read Unlimited edition.

**Expanded Access to Uploaded Images**

The editions table was updated to read Unlimited edition.

**Open Your Service Catalog to Customers and Partners**

The editions table was updated to read Unlimited edition.

**Save Time and Effort With Loyalty Management Mobile SDK**

Updated the release note to introduce the Loyalty Management Mobile SDK for Android.

**Salesforce Code Analyzer Scan Reports Now Required with Certain AppExchange Security Reviews**

Added a release note about Salesforce Code Analyzer scan reports are now required with managed package AppExchange security reviews.

**Legal Documentation**

Added a link to the Acceptable Use Policy.

**Optimize Agent Productivity and Response Quality with Service Replies**

Added a release note announcing general availability of Service Replies, powered by Einstein GPT.

**Close Cases Faster with Work Summaries**

Added a release note announcing general availability of Work Summaries, powered by Einstein GPT.

**Reschedule and Repeat a Stage In a Therapy Orchestration**

Added a release note announcing Therapy Orchestration's non-linear flows that help repeat stages.

**Changes to Sandbox License Compliance Process**

This feature is deferred until Fall 2023.

**See Object Names in Record Tabs and Subtabs**

Updated the release note to clarify that the record information in the tab and subtab could be something other than the record name.

**Sales Cloud Now Includes Quick Cadences and Email Productivity Features in Professional and Enterprise Editions**

Announced new features included in Professional and Enterprise editions.

## July 10, 2023

**Metadata API**

Added a release note about the new `enableDiarizationPref` and `enableUnifiedActivities` fields on the `ConversationalIntelligenceSettings` metadata type.

**The CASESAFEID Function Has Changed**

Removed this release note because this change was removed.

**Show Important Information on a Dashboard**

Added a disclaimer regarding open-source solution.

**Manage Follow-Up Appointments from the Field**

Added a disclaimer regarding open-source solution.

**Avoid Delays with Offline Image Uploading**

Added a disclaimer regarding open-source solutions.

**Metadata API**

Added release notes about new field values on the `MessagingChannel` metadata type.

**New and Changed Salesforce Scheduler Metadata Types**

Announced the new fields on the `Salesforce Scheduler IndustriesSettings` metadata type.

**Help Users Complete Therapy Tasks with an Apex Trigger**

Updated the language to clarify that you can use an existing Apex Trigger or add a new one.

**New Connect REST APIs in Public Sector Solutions**

Announced the new Connect REST API resources to define, merge, or manage party relationship groups.

**Update U2F Security Keys to Support WebAuthn Authentication**

Revised this announcement to include information about how users can update their U2F security keys to use WebAuthn after Winter '24.

## July 3, 2023

**Einstein Prediction Builder**

Removed the Einstein Prediction Builder Overview Release Note because of a delayed release.

**Enrich Predictions with Data from Related Objects (Beta)**

Removed the Einstein Prediction Builder Add Object (Joins) Release Note because of a delayed release.

**Use Amazon SageMaker Models with Data Cloud to Drive Personalization (Generally Available)**

Removed the Amazon SageMaker Builder Release Note because of a delayed release.

**Find the Financial Services Cloud Admin Guide in Salesforce Help**

Announced that the Financial Services Cloud Admin Guide is now in Salesforce Help.

**See Improved Color Contrast in UI Elements**

Added CustomObject and CustomObjectShare to the list of affected record home pages.

**Make Faster Clinical Determinations by Using Artificial Intelligence**

Updated the license name to Revenue Intelligence for Health.

**Metadata API**

Added a release note about deprecation of the `dateFormat` field on metadata type `MktDataLakeAttributes`.

**Metadata API**

Added a release note about new fields `mktDataLakeSrcKeyQualifier` and `keyQualifierName` on the `MktDataLakeAttributes` metadata type.

**New and Changed Modules for Lightning Web Components**

Added several GraphQL wire adapter limitations for custom objects.

**Metadata API**

Added a release note about a new `PaymentsSettings` metadata type for Salesforce Payments.

**Dig into Details About Page Load Times**

Corrected the release note to state that page load times are shown on the `EffectivePageTime` field, not the `Duration` field.

**New and Changed Objects**

Added an entry for the new `STATUS_CODE` field on the Apex Callout Event Type.

**New and Changed Objects**

Added a release note about removed picklist values from the `Metric` field on the `PipelineInspMetricConfig` object.

**Use Promotion Market Segments to Target the Right Customers**

Added updated information about using promotion market segments.

**Focus Your View with More Dashboard Filters**

Added support in Performance Edition.

**Enhance Your Visualizations with Images, Rich Text, and Dashboard Widgets**

Added support in Performance Edition.

**Metadata API**

Added the new enumerated values on the existing `expressionSetStepType` and `evaluationResult` fields on the `ExplainabilityMsgTemplate` metadata type.

**New and Changed Connect REST API Resources**

Added entries for new Salesforce Payments Connect REST API resources.

**New Financial Services Cloud Metadata Type**

Added a release note about a new ClaimFinancialSettings metadata type in Financial Services Cloud.

**Generate a SASB Report with the Disclosure and Compliance Hub Template**

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

**Control Who Can Use Organization-Wide Email Addresses**

Updated instructions to add permission sets to organization-wide email addresses.

**Customer Data Cloud Is Now Data Cloud in Permission Set Names and Other UI Text**

Added a release note about ongonig Data Cloud rebranding.

**Tooling API New and Changed Objects**

Added a release note about removed picklist values from the `Metric` field on the `PipelineInspMetricConfig` object.

**Choose When to Process Calculated Insights**

Removed this release note as this feature isn't generally available.

**Propose Three Future Meeting Times in Lightning Experience****Send a Meeting Request Quickly from the Dynamic Activity Composer****Set Your Available Times for Meetings**

Updated required user permissions to use this feature.

**Prepare for Locale Format Changes**

Corrected the release note to reflect that the changes to the start day of the week apply to International Components for Unicode (ICU) locale formats only.

**Highlight Android Device Runtime Permissions With New In-App Request Workflow**

Added a release note about the new runtime permission request workflow on Mobile Publisher for Experience Cloud Android apps.

**Link to Your Experience Cloud App's Privacy Policy From the Login Page**

Added a release note about linking to an app's privacy policy from the login screen on Mobile Publisher for Experience Cloud Android apps.

**Hover Text Label for Client Credentials Flow Execution User Is Changed**

Added a release note about an updated label on the Manage Connected Apps page.

**See Object Names in Record Tabs and Subtabs**

Corrected the release note to include how the feature works in subtabs, and that it works only on RRH-enabled objects.

**Get Enhanced Event Usage Metrics**

Updated the release note to include the new NetZero Cloud Connect APIs.

**Other Improvements to Messaging for In-App and Web**

Added two notes about when and how your domain and subdomains appear in the Trusted Domains for Inline Frames list for your website.

**End Conversations and Engage Bots with the Enhanced Bot Options Menu**

Added a Messaging release note that points to the Bots release note which announces support for the bot options menu for Enhanced Bots on a Messaging for In-App and Web channel.

**Control the Messaging for Web Button's Visibility Programmatically on Your Website**

Updated release note to explain that Experience Builder and Commerce Cloud customers can make their chat button visibility selection from a dropdown menu instead of an API.

## June 26, 2023

### Get Enhanced Event Usage Metrics

Updated a release note to indicate that the Enhance Usage Metrics feature is now available.

## June 19, 2023

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

Use staged data as an alternative to datasets to reduce processing time when your data strategy involves multiple recipes.

### Connect to Google Analytics 4 (Beta)

Update to the new Google Analytics 4 connector to sync Google Analytics data.

### Start a Dynamic Flow Directly from a Dashboard Widget (Beta)

Added information about enabling the feature for use.

### Create, delete, get, and update a decision table definition in Business Rules Engine

Announced new resources to create, delete, get, and update a decision table definition.

### New Connect in Apex Classes

Removed Named Credentials methods that are no longer available.

### Create Custom Property Types and Editors for Lightning Web Components in LWR Sites (Beta)

Added a change since developer preview: Custom labels are now supported for a custom property type's title and description fields.

### Legal Documentation

Added a link to the Business Associate Addendum Restriction Change Log.

### New and Changed Objects

Added information about the new ContractLineOutcome object.

### New and Changed Objects

Added information about the new ContractLineOutcomeData object.

### Field Service Mobile

Removed a topic: Set Up Image Upload Optimization More Easily. This feature is no longer scheduled for general availability.

### New and Changed Objects

Added a release note announcing new fields and field picklist changes on the existing ActionCadence, ActionCadenceRule, ActionCadenceStep, and ActionCadenceStepTracker objects.

### Metadata API

Updated a release note with new fields and metadata subtype in ActionableListDefinition metadata API type.

### Assess the Health of Your Sales Forecasts with Built-In Charts

Updated chart images and links to Salesforce Help.

### Specify a User's Verification Method in the Body of Headless Registration Requests

Added a release note about the correct way to specify a user's verification method when you configure the Headless Registration Flow.

### Migrate to Hyperforce with Hyperforce Assistant

Updated instructions on how to use Hyperforce Assistant. An invitation is no longer necessary and the Assistant is available to all general users.

### Get Records from Data Cloud Objects in Flow Builder

Clarified that you can view data from Data Cloud unified data model objects. Removed data lake objects from the list of object types.

## June 12, 2023

### New and Changed Objects

Added a release note for the AutomatedAction, AutomatedActionCondition, AutomatedActionOverride, AutomatedActionParameter, and AutomatedActionReminder objects.

### Security Enhancements for CSRF Tokens for Lightning Apps (Release Update)

This release update no longer applies to Lightning Out apps.

### New Tooling Objects in Financial Service Cloud

Announced the new RevenueSourceCategoryConfig and RevenueSourceObjectConfig Tooling objects for Financial Service Cloud.

### Consumer Goods Cloud Videos

Added a release note announcing the new Consumer Goods Cloud video.

### Salesforce Scheduler Videos

Added a release note announcing the new Salesforce Scheduler video.

### New Retail Metadata Types

Updated a release note about RetailExecutionSettings Metadata type in Consumer Goods Cloud.

### Changed object in Batch Management

Added a release note to announce changes to the BatchJobPart object.

### Feedback Management Videos

Added a release note announcing the new Feedback Management video.

### Act on Data Changes in Near Real Time

Added a release note on change data capture.

### Add a Bot Options Menu to Your Enhanced Bot

Added bot options menu support for the Messaging for In-App enhanced channel.

### The Ref ID Format for Email-to-Case is Changing

Clarified that this change is scheduled for the Winter '24 release.

### Allocate a Portion of Subsidiary or Partner Emissions to the Parent Company

Clarified that this change needs an add-on license.

### Enforce Rollbacks for Apex Action Exceptions in REST API (Release Update)

Changed Release Update title name to the accurate information.

### Organize Your Data with Data Spaces

Added a release note to announce data spaces feature in Data Cloud.

### View the Progress of Therapy Steps and Tasks

Updated the navigation instructions for finding the Lightning App Builder components.

### Easily Set Up the Contact Center with the New Guided Setup

Added a screenshot of the Contact Center guided setup.

### Save Time and Effort With Loyalty Management Mobile SDK

Added a release note to introduce the Loyalty Management Mobile SDK for iOS.

### Filter and Restore Data More Easily

Added a release note about the new Restore page UI in the Backup and Restore managed package.

### Routing

Removed a release note about a pilot feature that is no longer available: Interrupt Long-Running Work to Handle Time-Sensitive Work.

**Get Better Performance for Related Lists**

Updated the minor visual changes that users see on the LWC-enabled View All page.

**Accelerate Sales Cycles with a Buyer Assistant (Beta)**

Updated a release note about Buyer Assistant, a beta feature that was formerly named Einstein Bots for Sales. Added that Buyer Assistant is available the week of June 12, 2023.

**Get Enhanced Event Usage Metrics**

Updated a release note to indicate that the Enhance Usage Metrics feature will be available later in Summer '23.

## June 5, 2023

**Pending Order Summaries**

Announced the general availability of the Pending Order Summaries in Connect REST API.

**Help Users Complete Therapy Tasks with an Apex Trigger**

Clarified that the Apex Trigger code in the *Manually Assign Therapy Tasks to Users* help topic referenced in the release notes is a sample code.

**Complete Therapy Tasks Faster with Lightning Aura Components**

Clarified that the codes in the *Create a Lightning Aura Component for Tasks in Therapy Orchestration* and *Update Component Task Status with Lightning Message Channel* help topics are sample codes.

**Stay on Track with the Field Service Widget (Beta)**

Updated the release status to beta and updated the image.

**The Ref ID Format for Email-to-Case is Changing**

Documented the new format for Ref ID in Email-to-Case.

**Set Your Available Times for Meetings**

Added information about when this feature becomes available.

**Run the Lightning Knowledge Migration Tool**

Added a bullet item about the need to refactor custom solutions in a Classic Knowledge implementation

**Create a public complaint in Financial Services Cloud**

Announced a new resource to create a public complaint.

**Easily Manage Extensions**

Added availability status for each extension and removed screenshot.

**Use the OAuth Client Credentials Flow in More Editions**

Added a release note about the removal of an execution user permission requirement for the OAuth 2.0 client credentials flow.

## May 29, 2023

**Set Up Your Org Quickly with the Commerce Setup Assistant**

Clarified that if Commerce is enabled in your org, you can't turn on the Setup Assistant.

**Make Component Widgets Dynamic with Parameters**

Added graphics and additional detail about creating a parameter.

**Review Guest User Object, Record, and Field Access for Sites**

Added a note on the new Guest User Sharing Rule Access Report page in Setup. On this page, admins can see which records guest users have access to from sharing rules.

**Security Enhancements for CSRF Tokens for Lightning Apps (Release Update)**

This release update was scheduled to be enforced in Summer '23, but we postponed the enforcement date to Winter '24. It's still enforced for sandboxes in Summer '23.

**Set Up and Maintain Backups More Easily**

Added a release note about user interface improvements in the Backup and Restore managed package.

**New and Changed Objects**

Added information about new fields for the VideoCall and VoiceCall objects.

**Grow Your High-Value Segments with Einstein Lookalikes**

We removed a release note about creating high-value segments using Einstein Lookalikes.

**Marketing Cloud Account Engagement**

We removed the release note on a fix to columns in the enhanced builder experiences because it was delivered in a previous release.

**Automotive Cloud**

We added release notes to announce enhancements for Salesforce Scheduler License Requirements, Service Excellence components, Actionable Segmentation, Actionable Relationship Center, Data Processing Engine, Virtual Calls, and Groups and Households.

**Update Opportunities More Efficiently in Pipeline Inspection**

Removed checkbox from the list of field types users can edit inline on opportunities in Pipeline Inspection because it's not yet available.

**New and Changed Health Cloud Metadata Types**

Added a release note for the CareLimitType, CareBenefitVerifySettings, and CareRequestConfiguration metadata types.

**Complaint Management**

Added a release note to announce the new Complaint Management feature for Financial Services Cloud.

**Create a public complaint in Financial Services Cloud**

Announced a new resource to create a public complaint.

**Revenue Management for Financial Services Cloud**

Added a release note to announce the new Revenue Management for Financial Services Cloud feature.

**New and Changed Objects**

Added a release note about an update to the LinkedArticle object.

**Organize Your Data with Data Spaces**

Removed this release note as Data Spaces feature is not GA to customers yet.

**Boost Productivity with Mass Quick Actions on Related Lists (Beta)**

Clarified how to add quick actions on a related list and added more information about where quick actions appear.

**New and Changed Modules for Lightning Web Components**

Added a list of beta limitations for the GraphQL wire adapter.

**Create Accounts More Easily with Dynamic Forms**

Added a release note to announce Dynamic Forms supporting Automated Account Fields.

**See Required Fields at a Glance**

Added a release note about a required field message.

## May 22, 2023

**Link Tags in LWR Sites Now Use Lightning Navigation**

Added a note regarding link tags using Lightning navigation in LWR sites.



**Be Aware of Base Lightning Component Internal DOM Structure Changes for Future Native Shadow Support**

Added a note that base components are currently not supported for mixed shadow mode.

**New Tooling Object for Scoring Framework**

Announced the new AIScoringModelDefinition Tooling object for Scoring Framework.

**New Metadata Type for Scoring Framework**

Announced the new AIScoringModelDefinition Metadata type for Scoring Framework.

**Show Important Information on a Dashboard**

Added information about when this feature is available, updated the details on how to set up the feature, and added a link to GitHub.

**Manage Follow-Up Appointments from the Field**

Added information about when this feature is available, updated the details on how to set up the feature, and added a link to GitHub.

**Integrate Real-Time Events with Amazon EventBridge with Point and Click**

Updated Event Relay documentation link.

**Send Encrypted Events to Amazon EventBridge**

Updated Event Relay documentation link.

**Grow Your High-Value Segments with Einstein Lookalikes**

Added a release note about creating high-value segments using Einstein Lookalikes.

**Power Near Real-Time Orchestration with Marketing Cloud Journeys**

Updated the How section with BU details.

**Actionable Segmentation in Manufacturing Cloud (Generally Available)**

Added release notes about Actionable Segmentation enhancements in Manufacturing Cloud.

**Service Experience Enhancements in Manufacturing Cloud**

Added release notes about service experience enhancements in Manufacturing Cloud.

**Data Processing Engine Enhancements**

Added a release note about Data Processing Engine enhancements in Manufacturing Cloud.

**New and Changed Objects in Manufacturing Cloud**

Added a release note about new and changed objects in Manufacturing Cloud.

**Data Processing Engine Enhancements**

Added a release note about Data Processing Engine enhancements in Rebate Management.

**New and Changed Objects in Rebate Management**

Added a release note about new and changed objects in Rebate Management.

**Prepare for Locale Format Changes**

Added a pointer to updated locale formats in help.

**Replace Inactive Euro Locales**

Described inactive EURO locales.

**DocumentReader Namespace**

Added information about the new DocumentReader namespace and its classes and properties.

**Forecast on Opportunity Product Splits**

Added a release note about the ability to forecast on opportunity product splits.

**API Distortion Changes in Lightning Web Security**

Added a release note about new LWS distortions for web APIs.

**Health Cloud Has New and Changed Objects**

Added a section for Integrated Care Management.

**Industries Common Features**

Updated the description that mentions the new and changed features.

**Add a Bot Options Menu to Your Enhanced Bot**

Added a release note announcing support for the bot options menu for Enhanced Bots on a Messaging for In-App and Web.

**Enforce Rollbacks for Apex Action Exceptions in REST API (Release Update)**

Updated the enforcement date.

## May 15, 2023

**Refine Match Criteria with Case-Sensitive Matching**

Added a release note about a new configuration option for identity resolution ruleset match rules.

**Turn Off Scheduled Ruleset Runs**

Added a release note about a new option for controlling when identity resolution rulesets run.

**Create an Expression Set in Business Rules Engine**

Announced a new resource to create an Expression Set in Business Rules Engine.

**Send Survey Invitations to Unauthenticated Participants**

Announced the release of the Salesforce Feedback Management (SFM) unAuth Response APIs for unauthenticated survey participation.

**New and Changed Objects**

Added a release note about the ContactDailyMetric and LeadDailyMetric objects.

**AI Accelerator and Scoring Framework**

Updated the license names to mention only the Revenue Intelligence license for each Industries cloud.

**Retry to Activate or Deactivate a Template Configuration**

Removed information about deleting the AI Accelerator use case when a template configuration's deactivation fails.

**Learn About Data Visibility and Access with Updated Who Sees What Videos**

Added a release note about the updated Who Sees What video series.

**Stay on Track with the Field Service Widget (Beta)**

Added information about when this feature is available.

**Guide Your Mobile Workers at the Right Place and the Right Time (Pilot)**

Updated the example.

**Tooling API New and Changed Objects**

Added a release note about the ShiftSegmentType object.

**Reach More Customers with Multi-Language Support for System Bot Templates (Beta)**

Removed multi-language support for the Sales Prospecting Bot Template. This template doesn't currently support multilingual bots.

**Use TOTP Codes from Salesforce Authenticator More Easily**

Announced an improved user experience when using Salesforce Authenticator TOTP codes to access Salesforce.

**Configure Identity Verification Settings in One Location with an Improved User Interface**

Announced enhancements to the Identity Verification Setup user interface.

**Restrict Emails Sent from Unverified Email Addresses by the Guest User (Release Update)**

Clarified steps needed to continue sending emails from the guest user record.

**Watch Loyalty Management Videos**

Added a release note announcing the new Loyalty Management videos.

**Watch Manufacturing Cloud Videos**

Added a release note announcing the new Manufacturing Cloud videos.

**See When an Access Token Response Contains a JSON Web Token (JWT)-Based Access Token (Beta)**

Added a release note about a parameter in the access token response for JWT-enabled connected apps.

**New and Changed Objects**

Added a release note about removing the EmbeddedService picklist value for the Context field on the IframeWhiteListUrl object.

**Health Cloud Has New and Changed Objects**

Updated the list of fields in the Care Program Enrollee object to remove internal fields.

**Set a Password or Expiration on a Public Link to a Salesforce File**

Moved release note from Experience Cloud Section to General Enhancements section.

**Recalculate Account Sharing Rules Faster with Updated Opportunity Sharing Behavior**

Updated the availability date for this feature.

**Meeting Studio is Being Retired**

Added information about the availability of Meeting Studio.

**Improve Asset Care with Asset Attributes**

Added a release note about using asset attributes in criteria-based maintenance.

**Enable EmailSimple Invocable Action to Respect Organization-Wide Profile Settings (Release Update)**

Added a release note for the EmailSimple release update enforced in Spring '24.

## May 8, 2023

**Provide Users a List of Choices for Easy Selection with Choice Lookup (Generally Available)**

Added a new release note about the Choice Lookup screen component being generally available in Flow Builder.

**Metadata API**

Added the DataWeaveResource type.

**Migrate to Hyperforce with Hyperforce Assistant**

Clarified how orgs are scheduled to upgrade.

**New and Changed Objects**

Added behavior change for the FeedItem object.

Added a release note about the WebCartAdjustmentBasis object.

Added a release note about the CartItemPriceAdjustment object.

**Ensure Better Data Accuracy with Fully Qualified Keys**

Added a new release note about Fully Qualified Keys being available in Direct Data for Data Cloud.

**Metadata API**

Added the new AccountingFieldMapping metadata type.

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

This release update has been postponed indefinitely.

**Receive Change Event Notifications for More Objects**

Added release note about change event notifications for the CartDeliveryGroup, CartItem, CartItemPriceAdjustment, CartTax, CartValidationOutput, WebCart, WebCartAdjustmentBasis, and WebCartAdjustmentGroup objects.

**Get Service Insights and Build Bot Intents with Einstein Conversation Mining (beta)**

Removed references to 'Generally Available'. Replaced with 'Beta' and added beta disclaimer.

**Integrate Real-Time Events with Amazon EventBridge with Point and Click**

Removed Salesforce Classic because it isn't a supported UI.

**Restrict Emails Sent from Unverified Email Addresses by the Guest User (Release Update)**

Clarified the steps customers must take to continue sending emails from guest user records.

**Metadata API**

Added the new ExplainabilityMsgTemplateFieldTranslation subtype of the existing Translations metadata type.

**Metadata API**

Added the new IdentityVerificationFieldTranslation subtype of the existing Translations metadata type.

**Migrate Security Policies to the Mobile Security Setup UI**

Removed release note from the Release Updates section because it only applies to a small set of customers.

**Understand Trialforce Template Limits**

You can create up to 10 Trialforce templates per Trialforce Source Organization.

**Use Amazon SageMaker Models with Data Cloud to Drive Personalization (Generally Available)**

Updated branding from AWS SageMaker to Amazon SageMaker. Also, the Model Workspace tab is now Einstein Studio.

**Recalculate Account Sharing Rules Faster with Updated Opportunity Sharing Behavior**

Added release note about enabling faster account sharing by no longer storing child implicit opportunity share records.

## May 1, 2023

**Use the Iterable Interface with Set Type**

Added the IdeaExchange link for the feature.

**Configure Stack Depth of Chained Queueable Jobs (Beta)**

Added more advantages of configuring stack depth.

**Manage DML Exceptions in User-Mode Database Operations**

Fixed error in sample code.

**System Namespace**

Added information about Label methods.

**CRM Analytics Enhancements**

Corrected the name of the analytics app.

**Opt in for Event Log File Generation (Release Update)**

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

**Save Time by Using Salesforce in a Side Panel While Browsing the Web in Chrome**

Added a release note about new features available in the Salesforce Chrome extension.

**AppExchange Security Re-Reviews Available Upon Request****Better Performance for Embedded Analytics Dashboards**

Added a release note to update the availability of the feature, updating in production on a rolling basis.

**Get Content Security Policies for the Service Not Available and Too Many Request Pages**

Added a release note about a new security feature for the Too Many Requests (TMR) and Service Not Available (SNA) site pages.

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

Added a release note about a release update introduced in Spring '23.

**Understand Trialforce Template Limits**

We raised the maximum number of Trialforce templates allowed from 10 to 50.

# April 26, 2023

## Salesforce Summer '23 Release Notes

Published preview release notes.

## How and When Do Features Become Available?

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

## Supported Browsers

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

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<a href="#">Supported Browsers and Devices for Lightning Experience</a>	✓			
<a href="#">Supported Browsers and Devices for Salesforce Classic</a>	✓			
<a href="#">Supported Browsers for CRM Analytics</a>	✓			

## Salesforce Overall

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

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<b>General Enhancements</b>				
<a href="#">Multi-Factor Authentication (MFA) Auto-Enablement Continues with Summer '23</a>			✓	
<a href="#">See Improved Color Contrast in UI Elements</a>	✓			
<a href="#">Keep Working with Tab-Focused Dialogs (Release Update)</a>			✓	
<a href="#">See Tenant IDs in the Your Account App</a>	✓			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<a href="#">Manage More Products with the Your Account App</a>	✓			
<a href="#">Undo Field Changes with a Click</a>	✓			
<a href="#">Experience Improved Performance on More Record Home Pages</a>			✓	
<a href="#">Get Better Performance for Related Lists</a>	✓			
<a href="#">New Salesforce Feedback Management Developer Guide</a>			✓	
<a href="#">See Object Names in Record Tabs and Subtabs</a>	✓			
<a href="#">Feedback Form in Salesforce Help Menu Is Being Retired</a>	✓			
<a href="#">News, Automated Account Fields, and Account Logos Are Being Retired</a>	✓			
<a href="#">Send Survey Invitations to Unauthenticated Participants</a>			✓	
<a href="#">Set a Password or Expiration on a Public Link to a Salesforce File</a>	✓			
<b>Salesforce Scheduler</b>				
<a href="#">Lobby Management for Drop-In Customers</a>				
<a href="#">Manage Drop-In Customers</a>			✓	
<a href="#">Use Waitlists to Connect Customers with the Relevant Resources</a>			✓	
<a href="#">Reduce Customer Wait Time with Waitlists</a>			✓	
<a href="#">Get Notifications for Drop-In Appointments to Enhance Efficiency</a>			✓	
<a href="#">New and Changed Metadata Types</a>		✓		
<a href="#">Salesforce Scheduler Videos</a>	✓			
<b>Einstein Search</b>				
<a href="#">Configure Searchable Objects for Each User Profile (Beta)</a>			✓	
<a href="#">Quickly Configure Searchable Picklists (Beta)</a>		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<a href="#">Resolve Cases Faster with Einstein Search Answers (Pilot)</a>		✓		

## Analytics

Analytics enhancements include new and updated features for Lightning reports and dashboards, CRM Analytics, analytics apps, Einstein Discovery, and Tableau.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<b>Unified Analytics Experiences</b>				
<a href="#">Unify All Your Analytics in the Analytics Home (Generally Available)</a>	✓			
<a href="#">Post Lightning Dashboards with CRM Analytics for Slack</a>			✓	
<b>Reports and Dashboards</b>				
<a href="#">Enhance Your Visualizations with Images, Rich Text, and Dashboard Widgets</a>			✓	
<a href="#">Focus Your View with More Dashboard Filters</a>			✓	
<a href="#">Post Lightning Dashboards in Slack</a>			✓	
<a href="#">Manage Your Reports and Dashboards on the Analytics Tab (Generally Available)</a>			✓	
<b>CRM Analytics</b>				
<a href="#">Bring Together All Your Analytics in Analytics Home (Generally Available)</a>	✓			
<b>CRM Analytics Visualization and Dashboard Building</b>				
<a href="#">Make Component Widgets Dynamic with Parameters</a>	✓			
<a href="#">Rename Columns in Lenses with Ease</a>	✓			
<a href="#">View Table Totals and Subtotals in Direct Data</a>	✓			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Use Enhanced Single-Click Interactions in Dashboard Widgets				✓
Start a Dynamic Flow Directly from a Dashboard Widget (Beta)				✓
Explore Multiple Data Model Objects in Direct Data Using Joins (Beta)	✓			
Ensure Better Data Accuracy with Fully Qualified Keys	✓			
Better Performance for Embedded Analytics Dashboards				✓
Troubleshoot Dashboard Performance Quickly with Dashboard Inspector 2.0	✓			
Get Improved Dashboard Performance with Better Caching				✓
Experience Faster Dashboard Exploration				✓
Get Improved Performance on Data Cloud Queries	✓			
Publish Tableau Content to CRM Analytics (Beta)				
<b>Data Integration</b>				
Running Sequential Recipes Faster with Staged Data (Beta)	✓			
Connect to Google Analytics 4 (Beta)	✓			
<b>Analytics Development</b>				
Build Dashboard Interactions with the Improved Developer Guide				✓
Updated Location for CRM Analytics Mobile Beta Testing				✓
<b>Analytics Apps</b>				
<b>Revenue Intelligence</b>	✓			
<b>Industry Analytics Apps</b>	✓			
<b>Einstein Discovery</b>				
<b>Improve Recommendations with Decision Optimization (Beta)</b>			✓	



Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<a href="#">Migrate Your Einstein Discovery Models (Generally Available)</a>		✓		
<a href="#">Tableau</a>	✓			
<a href="#">Marketing Cloud Intelligence</a>	✓			

## Commerce

Commerce Cloud enhancements include new and updated features for B2B and D2C Commerce, Omnichannel Inventory, Salesforce Order Management, and Salesforce Payments.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<b>Salesforce B2B and D2C Commerce</b>				
<b>Commerce Einstein</b>				
<a href="#">Enhance Product Descriptions with Einstein Generative AI</a>	✓			
<a href="#">Easily Manage Extensions</a>	✓			
<a href="#">Use Salesforce Payments in Your Commerce Store</a>	✓			
<a href="#">Embed Pay Now on Different Salesforce Apps</a>			✓	
<a href="#">Let Guests Shop in Your B2B Store</a>	✓			
<a href="#">Create Customer Experiences Based on Market Locale</a>	✓			
<a href="#">Provide Translations for Promotions</a>	✓			
<a href="#">Let Shoppers Combine Promotion Discounts</a>	✓			
<a href="#">Use Promotion Market Segments to Target the Right Customers</a>	✓			
<a href="#">Improve SEO with Custom URL Slugs (Beta)</a>			✓	
<a href="#">Customize Store Search with the Search Results Rules API</a>			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Display Suggested Products in Search with the Product Search Suggestions API			✓	
Create Rich Search Results with Structured Data (Pilot)			✓	
Choose Which Product Fields to Display (Pilot)		✓		
Set Up Your Org Quickly with the Commerce Setup Assistant	✓			
Troubleshoot Store Issues with the Commerce Assistant	✓			
Export Product Data to a CSV File	✓			
Easily Manage Content with Enhanced CMS	✓			
Search Globally with Increased Locale Support			✓	
Use Einstein Search Suggestions in D2C Commerce			✓	
Accelerate Self-Service Reorders with a Commerce Reorder Portal			✓	
<b>Commerce Components</b>				
Build B2B and B2C Stores Using the Same LWR Technology and Components	✓			
Customize the Payment Processing Message	✓			
Easily Format Currency in Your Stores	✓			
Let Customers Select the Country for Their Store				
Streamline Checkout for Mobile Customers	✓			
Design Product Pages with Ease Using Components		✓		
Improve Customer Experience with a Wishlist		✓		
Shop Faster with Quick Order	✓			
<b>Omnichannel Inventory</b>				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Track Inventory Reservations End to End	✓			
Get Better Performance When Processing Inventory Records	✓			
Salesforce Order Management				
Charge Fees for Returns and Cancellations	✓			
Self Provision Order Self-Service				
Fulfill Orders Quickly with Pick Tickets				
Order on Behalf of a Customer in B2B Commerce and D2C Commerce				
Salesforce Payments (Generally Available)				
Give Access to Payments Functionality Based on User Roles			✓	
Easily Create Merchant Accounts for Payment Processing			✓	
Control Which Payment Methods Are Accepted at Checkout			✓	
Help Customers Check Out Faster with Saved Payment Methods			✓	
Give Merchants a Single Place to View Payment Information			✓	
Issue Refunds for Multi-Capture Payments (Beta)				
Embed Payment Solutions in Your Apps with Pay Now				

## Customization

Use the new Salesforce Connect adapter for GraphQL to connect external sources that expose their capabilities via GraphQL. Assign field-level security for permission sets instead of profiles.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Salesforce Connect				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Connect External Data Sources Managed via GraphQL from Salesforce (Generally Available)			✓	
Get OData Version 4.01 Support for Salesforce Connect OData Adapter	✓			
Permissions				
Set Field-Level Security for a Field on Permission Sets Instead of Profiles (Generally Available)			✓	
Allow Delegated Admins to Manage Permission Set Group Assignments		✓		
See More Information in Reports from the User Access and Permissions Assistant			✓	
Learn About Data Visibility and Access with Updated Who Sees What Videos		✓		
Automate and Migrate User Access with User Access Policies (Beta)			✓	
Lightning App Builder				
Give Your Mobile Users the Dynamic Forms Experience (Beta)			✓	
Align Fields Horizontally in Field Sections		✓		
Optimize Your App Pages with the Accordion and Tabs Components		✓		
Other Improvements to UI Text in Lightning App Builder		✓		
Create Accounts More Easily with Dynamic Forms			✓	
Globalization				
Enable ICU Locale Formats (Release Update)			✓	
Explore More Custom Address Field Functionality		✓		
Available Country List Is Changed			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<a href="#">Review Updated Label Translations</a>	✓			
<a href="#">Prepare for the Japanese Katakana Style Change (Release Update)</a>	✓			
<a href="#">Adopt New Currencies for Croatia and Sierra Leone</a>	✓			
<a href="#">Prepare for Locale Format Changes</a>	✓			
<a href="#">Replace Inactive Euro Locales</a>	✓			
<a href="#">Reduce Base Package Size with Language Extension Packages (Beta)</a>			✓	
<b>External Services</b>				
<a href="#">Declaratively Edit External Services Created by HTTP Callout</a>		✓		
<a href="#">MuleSoft Registration Review Page Has Changed</a>		✓		
<a href="#">Enjoy More Screen Real Estate</a>		✓		
<a href="#">Call a MuleSoft Invocable Action from an Orchestration</a>		✓		
<b>Fields</b>				
<a href="#">Limit the Number of Inactive Picklist Values</a>		✓		
<a href="#">Say Hello to Salutation Picklist Values in Lightning Experience</a>		✓		
<a href="#">Reflect the Diversity of Your Customers with Gender-Neutral Salutations</a>	✓			
<b>General Setup</b>				
<a href="#">Clone Lightning Apps</a>		✓		
<a href="#">Use One File to Install Data Loader on macOS or Windows</a>		✓		
<a href="#">Enable Faster Account Sharing Recalculation by Not Storing Case and Contact Implicit Child Shares (Release Update)</a>			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<a href="#">Recalculate Account Sharing Rules Faster with Updated Opportunity Sharing Behavior</a>				✓
<a href="#">Boost Productivity with Mass Quick Actions on Related Lists (Beta)</a>			✓	
<a href="#">Track Field History for Net Zero Cloud</a>	✓			
<a href="#">Accessibility for List Views Is Improved</a>	✓			
<a href="#">See Required Fields at a Glance</a>	✓			

## Data Cloud

Ingest, harmonize, unify, analyze, and stream data with Data Cloud, previously called Customer Data Platform. Explore expanded functionality for getting organized and segregate data based on your business needs. Merge and analyze data using existing segment rules and common elements.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<a href="#">Customer Data Platform Is Now Data Cloud</a>				
<a href="#">Customer Data Cloud Is Now Data Cloud in Permission Set Names and Other UI Text</a>	✓			
<a href="#">Organize Your Data with Data Spaces</a>	✓			
<a href="#">Increase Data Refresh with Rapid Segment Publish (Generally Available)</a>	✓			
<a href="#">Save Time with Nested Segments (Generally Available)</a>	✓			
<a href="#">Narrow a Segment Audience with Exclusion Criteria (Generally Available)</a>	✓			
<a href="#">Grow Your High-Value Segments with Einstein Lookalikes</a>	✓			
<a href="#">Create Data Streams with the SFTP Connector in Data Cloud</a>			✓	
<a href="#">Save Time and Prevent Errors with Auto-Mapping Suggestions</a>	✓			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<a href="#">Transform Data in Near Real Time in Data Cloud</a>	✓			
<a href="#">Authorize Apps to Access Data Cloud Resources</a>			✓	
<a href="#">Connect to Data Cloud with the New Tableau Connector</a>	✓			
<a href="#">Use Amazon SageMaker Models with Data Cloud to Drive Personalization (Generally Available)</a>				
<a href="#">Analyze Your Activation Data Using the Audience DMO (Pilot)</a>			✓	
<a href="#">Use B2C Commerce Activation Targets</a>			✓	
<a href="#">Protect Your Activation Data with CPRA Tagging</a>			✓	
<a href="#">Use Your Own SFTP Server to Activate Segments (Pilot)</a>			✓	
<a href="#">Power Near Real-Time Orchestration with Marketing Cloud Journeys</a>	✓			
<a href="#">Enrich Data Actions with Related Objects and Attributes</a>	✓			
<a href="#">Get More out of Data Cloud Lightning Apps</a>	✓			
<a href="#">Refine Match Criteria with Case-Sensitive Matching</a>	✓			
<a href="#">Turn Off Scheduled Ruleset Runs</a>	✓			
<a href="#">Act on Data Changes in Near Real Time</a>	✓			
<a href="#">Prepare Data Visually with Batch Data Transforms</a>	✓			
<a href="#">Add New Object Permissions to Custom Permission Sets in Data Cloud</a>			✓	
<a href="#">Choose When to Process Calculated Insights</a>	✓			
<a href="#">Everything New Across Salesforce for Data Cloud</a>				

## 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
<a href="#">New and Changed Components for Change Sets</a>		✓		

## Development

Whether you're using Lightning components, Visualforce, Apex, platform events, 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
<a href="#">Lightning Components</a>				
<a href="#">Discover the New Lightning Web Components Developer Guide</a>	✓			
<a href="#">Reduced Limit for Number of Actions in a Boxcar Request</a>		✓		
<a href="#">Use Lightning Web Security for Lightning Web Components and Aura Components (Generally Available)</a>		✓		
<a href="#">API Distortion Changes in Lightning Web Security</a>			✓	
<a href="#">Enable Third-Party Integrations with Light DOM (Generally Available)</a>		✓		
<a href="#">Attribute Names Support More Patterns</a>		✓		
<a href="#">Synchronize Component Data Without a Page Refresh Using RefreshView API (Generally Available)</a>		✓		
<a href="#">Assign CSS Stylesheets to a Component</a>		✓		
<a href="#">Create Scoped Slots in Light DOM</a>		✓		
<a href="#">Set Dynamic Values for the Slot Attribute in Lightning Web Components</a>		✓		
<a href="#">Scan More Barcodes at Once, Save Time—Improved Bulk Scanning with BarcodeScanner</a>		✓		



Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<a href="#">New scan() Function for BarcodeScanner Does It All</a>		✓		
<a href="#">Validate Your Lightning Web Components for Offline Use with the Komaci Static Analyzer</a>		✓		
<a href="#">Develop Offline-Ready LWCs with the LWC Offline Test Harness</a>		✓		
<a href="#">Be Aware of Base Lightning Component Internal DOM Structure Changes for Future Native Shadow Support</a>		✓		
<a href="#">Base Component lightning-input Internal DOM Is Changing in Winter '24</a>		✓		
<a href="#">Identify UTAM Page Objects More Easily with the Browser Extension (Beta)</a>		✓		
<a href="#">Use Error Codes to Fix UTAM Page Objects</a>		✓		
<a href="#">Security Enhancements for CSRF Tokens for Lightning Apps (Release Update)</a>			✓	
<b>Visualforce</b>				
<a href="#">Enable JsonAccess Annotation Validation for the Visualforce JavaScript Remoting API (Release Update)</a>		✓		
<a href="#">Validate Getter and Setter Access Modifier Enforcement During Visualforce Expression Language Parsing (Release Update)</a>		✓		
<a href="#">Prevent Consecutive API Navigation Calls (Release Update)</a>		✓		
<b>Apex</b>				
<a href="#">Access Labels in Apex Dynamically</a>		✓		
<a href="#">Configure Stack Depth of Chained Queueable Jobs (Beta)</a>		✓		
<a href="#">Use DataWeave in Apex to Enable Data Transformation to Different Formats (Beta)</a>		✓		
<a href="#">Use the Iterable Interface with Set Type</a>		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<a href="#">See Improved Logging with Assert Class Methods</a>		✓		
<a href="#">Manage DML Exceptions in User-Mode Database Operations</a>		✓		
<a href="#">Code Coverage of Tests Run during Package Install Has Changed</a>		✓		
<a href="#">Enforce RFC 7230 Validation for Apex RestResponse Headers (Release Update)</a>			✓	
API				
<a href="#">Query Five Levels of Parent-to-Child Relationships in SOQL Queries</a>			✓	
<a href="#">Async SOQL Is Being Retired</a>		✓		
<a href="#">Salesforce Platform API Versions 21.0 Through 30.0 Retirement (Release Update)</a>			✓	
Packaging				
<a href="#">Transfer Package Ownership to a Different Dev Hub (Generally Available)</a>		✓		
<a href="#">Experience Better Performance for Packaging Operations</a>		✓		
<a href="#">Reference Standard Value Sets By Specifying a Seed Metadata Directory</a>		✓		
<a href="#">Reduce Translated Package Size with Language Extension Packages (Beta)</a>		✓		
Development Environments				
<a href="#">Quickly Create Full Sandboxes (Generally Available)</a>		✓		
<a href="#">Changes to Sandbox License Compliance Process</a>				
Platform Development Tools				
<a href="#">Develop Platform Apps with Ease</a>		✓		
<a href="#">Deploy Scalable Apps and Analyze System Performance with Scale Center</a>			✓	
<a href="#">Conduct Quick, Easy, and Accurate Scale Tests with Scale Testing Service</a>			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<b>Salesforce Functions</b>				
Salesforce Functions Updates				✓
<b>AppExchange Partners</b>				
Custom Object CRUD Data from Apex Unit Tests Is No Longer Available in AppExchange App Analytics				✓
Understand Trialforce Template Limits	✓			
AppExchange Security Re-Reviews Available Upon Request	✓			
Salesforce Code Analyzer Scan Reports Now Required with Certain AppExchange Security Reviews				✓
<b>Change Data Capture</b>				
Receive Change Event Notifications for More Objects		✓		
<b>Platform Events</b>				
Track the Publishing of Platform Events with Apex Publish Callbacks (Generally Available)		✓		
Get Enhanced Event Usage Metrics		✓		
<b>Event Bus</b>				
Integrate Real-Time Events with Amazon EventBridge with Point and Click		✓		
Send Encrypted Events to Amazon EventBridge		✓		

## 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
<b>Enablement</b>				
Preview Enablement Programs and Templates		✓		
Build Programs Faster with More Predefined Measures			✓	
Build In Flexibility and Prove Consistency Using Average-Based Goals		✓		
Get More Control Over Enablement Admins' View of Objects and Fields	✓			
Assign Users to Enablement Programs More Efficiently	✓			
Test Enablement in All Sandbox Types More Easily		✓		
Manage Images for Rich Text Content in Lesson Exercises More Efficiently		✓		
Other Changes in Enablement		✓		
<b>Guidance Center and In-App Guidance</b>				
Personalize the Size and Placement of the Guidance Center Panel		✓		
Provide More Detailed In-App Guidance with Targeted Prompts on Record Fields		✓		
Show Salesblazer Content in the Guidance Center		✓		

## Experience Cloud

Personalize your LWR sites with Expression-Based Visibility and device-based visibility settings. Discover an abundance of new and improved LWR components, including Tabs, Logo, and Knowledge Article. Migrate your Aura sites to Google Analytics 4. And enjoy a boost in performance and productivity with improved custom domains, component caching, site navigation, and more.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<b>Aura and LWR Sites</b>				
Search for CRM Records in LWR Sites (Generally Available)		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<a href="#">Deliver Better Site Redirects with Updated Page &lt;head&gt; Tags</a>		✓		
<a href="#">Navigate Your Site More Easily in Experience Builder</a>		✓		
<a href="#">Customize the Search Component in Theme Hero Banners in Aura Sites</a>		✓		
<a href="#">Link Tags in LWR Sites Now Use Lightning Navigation</a>		✓		
<a href="#">Evaluate the Quality of Leads and Opportunities with Einstein Scoring for Salesforce PRM</a>			✓	
<b>Components in Experience Builder</b>				
<a href="#">Create Component Visibility Rules in Experience Builder (Generally Available)</a>		✓		
<a href="#">Organize Your LWR Site Pages with Tabs</a>		✓		
<a href="#">Add Bulleted and Numbered Lists to Your Enhanced LWR Sites</a>		✓		
<a href="#">Add Your Logo to LWR Sites</a>		✓		
<a href="#">Fine-Tune How Your Enhanced LWR Site Appears on Different Devices</a>		✓		
<a href="#">View Knowledge Articles in LWR Sites with the Knowledge Article Component</a>	✓			
<a href="#">Add to the Actions Bar in LWR Sites (Beta)</a>		✓		
<a href="#">Update Your Settings and Do More with Record Detail Components in LWR Sites (Beta)</a>		✓		
<b>Developer Productivity</b>				
<a href="#">Migrate Aura Sites to Google Analytics 4 (Release Update)</a>			✓	
<a href="#">Use Lightning Web Security in Aura Sites (Generally Available)</a>			✓	
<a href="#">Display Branded Toast Notifications in LWR Sites</a>		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<a href="#">Manage Toast Notifications with a Toast Container (Beta)</a>		✓		
<a href="#">Improve Performance of Connect APIs in Enhanced LWR Sites (Beta)</a>			✓	
<a href="#">Create Custom Property Types and Editors for Lightning Web Components in LWR Sites (Beta)</a>		✓		
<a href="#">ExperienceBundle Supports Only Object Pages Available in Experience Builder</a>		✓		
<a href="#">Tailor Your Identity Experiences in Third-Party Apps with New and Improved Headless Identity Features</a>			✓	
Site Performance				
<a href="#">Learn More About Custom Domain Setup and Maintenance with Expanded Content</a>		✓		
<a href="#">Set Up a Custom Domain with Confidence with Improved In-App Guidance</a>		✓		
<a href="#">Get Improved Component Caching in Aura Sites</a>		✓		
<a href="#">Use Dynamic Redirect Rules in LWR Sites (Beta)</a>		✓		
<a href="#">Get Notified When You Approach Your Portal Role Limit</a>		✓		
<a href="#">Review Changes to Network Memberships in the Setup Audit Trail</a>		✓		
<a href="#">Get Notified About Membership Processing Status</a>		✓		
<a href="#">Improve Authorization Flow Performance with JSON Web Token (JWT)-Based Access Tokens (Beta)</a>			✓	
Security and Sharing				
<a href="#">Review Guest User Object, Record, and Field Access for Sites</a>		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<a href="#">Restrict Emails Sent from Unverified Email Addresses by the Guest User (Release Update)</a>			✓	
<a href="#">Require Sender Name and Email Address to Send Chatter Email Notifications (Release Update)</a>		✓		
<a href="#">Get More Control over Self-Registration</a>			✓	
<a href="#">Prepare Your Experience Cloud Site for the Move to Salesforce Edge Network</a>		✓		
<a href="#">Get Content Security Policies for the Service Not Available and Too Many Request Pages</a>		✓		
<b>Other Changes</b>				
<a href="#">Remove the Mobile Publisher App Update Component from Your Sites</a>		✓		

## Field Service

Create schedules using robust features with the Enhanced Scheduling and Optimization Engine, available for new users by default. Or, easily switch to the new engine for all service territories for improved scalability, performance, and scheduling quality. Save time by letting mobile workers set follow-up appointments in the app. Expand how mobile users get work done, with custom dashboards and images that can be annotated and uploaded even when offline. Supercharge workflows with the reimagined tablet experience and updated related list UI. Enable customers to track service outcomes to easily assess the compliance of service contracts. Ensure timely maintenance by planning ahead for potential blockers. Route work to the best agent for the job. Enhance the customer experience by enabling customer-driven live sessions and messaging with Visual Remote Assistant.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<b>Resource Management</b>				
<b>Enhanced Scheduling and Optimization</b>				
<a href="#">Create Optimal Schedules and Benefit from Innovative Capabilities with the Default Enhanced Scheduling and Optimization Engine</a>		✓		
<a href="#">Switch Easily to Enhanced Scheduling and Optimization for Existing Orgs</a>			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Get Additional Supported Features with Enhanced Scheduling and Optimization			✓	
Improve Your Mobile Workers' Efficiency by Defining Offsite Service Appointments			✓	
<b>Show All the Availability Information on the Gantt</b>			✓	
<b>Expand Access to More Contractors with Login-Based SKUs</b>				✓
<b>Asset Management</b>				
<b>Ensure High Quality of Service with Outcome-Based Contracts</b>	✓			
<b>Build In Lead Time on Usage-Based Work Orders</b>			✓	
<b>Route Important Work Items Quickly with Omni-Channel</b>			✓	
<b>View the Change History for a Field</b>			✓	
<b>Price Your Assets with More Precision</b>	✓			
<b>Improve Asset Care with Asset Attributes</b>			✓	
<b>Find Notes and Files Easily for Product Service Campaigns</b>	✓			
<b>Build Service Recommendations for Your Assets</b>			✓	
<b>Migrate from Maintenance Plan Frequency Fields to Maintenance Work Rules (Release Update)</b>			✓	
<b>Customer Engagement</b>				
<b>Visual Remote Assistant</b>				
Engage More with Customers by Using Messaging for In-App and Web	✓			
Customize the Visual Remote Assistant Session's Invite Flow Preferences	✓			
<b>Mobile</b>				
<b>Lightning Web Components</b>				



Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<a href="#">Manage Follow-Up Appointments from the Field</a>			✓	
<a href="#">Show Important Information on a Dashboard</a>			✓	
<a href="#">Avoid Delays with Offline Image Uploading</a>			✓	
<b>Stay on Track with the Field Service Widget (Beta) (not immediately available)</b>	✓			
<b>Get Information at a Glance with Redesigned Related Lists</b>		✓		
<b>Guide Your Mobile Workers at the Right Place and the Right Time (Pilot)</b>			✓	
<b>Access Login Servers with One Click</b>		✓		
<b>Customize the Calendar View for iPhone</b>	✓			
<b>Launch Lightning Web Components from Work Steps</b>		✓		

## Hyperforce

Hyperforce is the next-generation Salesforce infrastructure architecture, built for the public cloud. It enhances Salesforce applications' compliance, security, privacy, agility and scalability, and gives customers more choice over data residency.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<b>Tackle Data Privacy Concerns with Hyperforce European Union (EU) Operating Zone</b>	✓			
<b>Migrate to Hyperforce with Hyperforce Assistant</b>			✓	

## Industries

Industries solutions shape Salesforce to the needs of your business, reducing the need for you to customize things yourself. Schedule test drives and service appointments with Automotive Cloud. Calculate order prices online and plan store visits with Consumer Goods Cloud. Actionable Segmentation is now generally available in Financial Services Cloud. Schedule home healthcare visits with Health Cloud. Manage lifecycles of awarded grants with Grantmaking for Public Sector Solutions and Nonprofit Cloud. Use CSV files to upload data to Net Zero Cloud. Automate selection of members for tier change and tier upgrade assessments with Loyalty Cloud. Orchestrate

end-to-end warranty lifecycles with Manufacturing Cloud. Build ship and debit programs with Rebate Management. We also have plenty of changes for Education Cloud, Nonprofit Cloud, Media Cloud, Industries common features, and many more.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<b>Automotive Cloud</b>				
<b>Salesforce Scheduler for Automotive Cloud</b>				
Salesforce Scheduler License Requirements in Automotive Cloud				
Delight and Engage Your Prospects by Scheduling Test Drives			✓	
Guarantee Timely Vehicle Maintenance by Scheduling Service Appointments			✓	
Customize Appointment Scheduling Processes Using OmniStudio			✓	
<b>Inventory Visibility for Automotive Cloud</b>				
Build Your Own Search Experience to Track Vehicle Inventory			✓	
Help Users Quickly Search for Vehicles Across Dealer Locations			✓	
Transform Vehicle Inventory Data Using a Data Processing Engine Definition			✓	
Eliminate Guesswork by Helping Users Select Picklist Values as Search Criteria			✓	
Simplify Search Navigation by Helping Users Click Hyperlinks for Record Names			✓	
<b>Warranty Lifecycle Management for Vehicles and Parts</b>				
Define Warranty Eligibility Using Warranty Term Coverages			✓	
Minimize Claim Processing Time By Helping Your Dealers Submit More Detailed Claims			✓	
Capture Labor and Product Fault Details to Standardize Service Processes			✓	
Verify and Settle Claims for Vehicle and Part Issues with Increased Accuracy			✓	
<b>Vehicle and Asset Console Enhancements</b>				
Get a Unified View of an Asset and Capture Details			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<a href="#">View All Claims Related to a Vehicle in a Single List</a>			✓	
<a href="#">View All Appointments Related to a Vehicle in a Single List</a>			✓	
<b>Service Experience Enhancements in Automotive Cloud</b>				
<a href="#">Identity Verification</a>			✓	
<a href="#">Engagement Interactions</a>			✓	
<a href="#">Audit Trail</a>			✓	
<a href="#">Service Process Studio</a>			✓	
<a href="#">Action Launcher</a>			✓	
<a href="#">Record Alerts</a>			✓	
<b>Actionable Segmentation in Automotive Cloud (Generally Available)</b>				
<a href="#">Actionable List Definitions</a>			✓	
<a href="#">Actionable List Members</a>			✓	
<a href="#">Outreach List</a>			✓	
<b>Actionable Relationship Center Enhancements</b>				
<a href="#">Enhance Visits and Appointments with Virtual Calls and Video Visits</a>			✓	
<b>Groups and Households Enhancements</b>				
<b>Data Processing Engine Enhancements</b>				
<b>Maximize Your Revenue from Leads and Opportunities</b>				
<b>New and Changed Objects in Automotive Cloud</b>				
<b>New and Changed Automotive Cloud Metadata Types</b>				
<b>New and Changed Tooling Objects in Automotive Cloud</b>				
<b>New and Changed Connect REST API Resources</b>				
		✓		
<b>Consumer Goods Cloud</b>				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<b>Improve Customer Satisfaction with Consumer Goods Cloud for Service</b>			✓	
<b>Stay Connected with Processing Services by Updating Your Certificate</b>			✓	
<b>Einstein Vision for Planogram Compliance Is Being Retired</b>			✓	
<b>Other Improvements in Consumer Goods Cloud</b>		✓		
<b>Retail Execution</b>				
Get Accurate Order Prices Online with Penny Perfect Pricing			✓	
Maintain Store Operating Hours Efficiently in Consumer Goods Cloud Offline Mobile App			✓	
Improved User Experience with the Enhanced Product Filter			✓	
Boost Productivity with the New Order Lightning Web Component				
Analyze and Track Product Performance Easily			✓	
<b>New Retail Metadata Types</b>		✓		
<b>Trade Promotion Management</b>				
Get Started with Trade Promotion Effectiveness			✓	
View Interactive Dashboards in Promotions			✓	
Make Quicker Decisions While Planning			✓	
Plan Better By Evaluating Customer Business Plan Scenarios (Pilot)			✓	
Export More KPI Reports Simultaneously			✓	
Get Started with Consumer Goods Cloud Faster with MuleSoft Direct			✓	
<b>Consumer Goods Cloud Videos</b>				
<b>Changed Objects in Consumer Goods Cloud</b>		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<b>Financial Services Cloud</b>				
<b>Financial Services Cloud Guide Changes</b>				
Financial Services Cloud Installation, Quick Start, and Update Guides				
<b>Financial Services Cloud Admin Guide</b>				
Find the Financial Services Cloud Admin Guide in Salesforce Help	✓			
<b>Actionable Segmentation (Generally Available)</b>				
Actionable Segmentation Enhancements			✓	
Outreach List				
Actionable List Members				
<b>Marketing Cloud Engagement for Financial Services Cloud</b>				
Send Customized Emails Using Marketing Cloud			✓	
<b>Complaint Management</b>				
Streamline the Complaint Intake Process with Complaint Management	✓			
Enable Your Customer Community Users to File Complaints on Financial Services Client Portal			✓	
Provide Better Customer Experience by Analyzing Customer Complaints		✓		
Changed Objects		✓		
Connect REST APIs		✓		
Apex: New and Changed Items in Financial Services Cloud				
<b>Actionable Relationship Center</b>				
View an ARC Graph by Zooming	✓			
Hide Card Fields on an ARC Graph	✓			
Identify Cards with Child Cards Faster	✓			
<b>Service Process Automation</b>				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Service Process Studio for Financial Services Cloud		✓		
Service Processes for Self-Service				
<b>Discovery Framework</b>				
More Support for Discovery Framework			✓	
<b>Revenue Management for Financial Services Cloud</b>				
Set Up Revenue Management for Financial Services Cloud More Easily		✓		
Manage Your Revenue and Team Better		✓		
<b>Scoring Framework for Financial Services Cloud</b>				
Optimize Your Revenue by Using Scoring Framework			✓	
Engage with the Right Customers by Showing Predictions on Actionable Lists			✓	
<b>Action Plans for Financial Services Cloud</b>			✓	
<b>Record Alerts</b>				
Record Alerts			✓	
<b>Branch Management</b>				
Add Bankers to Branches			✓	
<b>New and Changed Financial Services Cloud Object Fields</b>		✓		
<b>New Tooling Objects in Financial Service Cloud</b>		✓		
<b>New Financial Services Cloud Metadata Type</b>		✓		
<b>Grantmaking</b>				
Get Familiar with the New Grantmaking Settings and Permissions			✓	
Capture Details About Grant Opportunities			✓	
Manage and Review Budgets			✓	
Manage and Review Grant Applications			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<b>Manage the Lifecycle of an Awarded Grant</b>			✓	
<b>Add Salesforce Approval Processes for Submitted Grantmaking Records</b>			✓	
<b>Make Applying for Grants Easy by Creating an Experience Cloud Site</b>			✓	
<b>New Objects and Fields in Grantmaking</b>			✓	
<b>New Grantmaking Metadata Type</b>			✓	
<b>Health Cloud</b>				
<b>Home Health</b>				
Record Patient Preferences for Home Healthcare Services			✓	
Schedule Visits Based on Preferences			✓	
Use Prior-Authorization Data to Determine Visit Count	✓			
Reassign Visits in Bulk			✓	
Update Assignments Automatically When Resources Take Time Off			✓	
Operate in the Field with the Salesforce Field Service Mobile App			✓	
Accelerate your Home Health Implementation with the Guided Setup		✓		
<b>Crisis Support Center Management Enhancements</b>				
Set Up Crisis Support Center Management More Easily		✓		
Search for Beds Across Healthcare Facilities	✓			
<b>Utilization Management Enhancements</b>				
Facilitate a Streamlined Submission of Authorization Requests to Payers			✓	
Inquire and Get Up-to-Date Status of Authorization Requests			✓	
Make Faster Clinical Determinations by Using Artificial Intelligence	✓			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<b>Advanced Therapy Management Enhancements</b>				
Easily Orchestrate Advanced Therapies with Customizable Flows		✓		
Collaborate Efficiently with Participant Roles for Advanced Therapies			✓	
Make Therapy Task Assignment Easy with Teams	✓			
Create Custom Tasks with Action Plan Templates in Advanced Therapies		✓		
Clone Sample Flows to Generate Custom Work Order Steps		✓		
Complete Therapy Tasks Faster with Lightning Aura Components			✓	
Help Users Complete Therapy Tasks with an Apex Trigger			✓	
Reschedule and Repeat a Stage In a Therapy Orchestration		✓		
View the Progress of Therapy Steps and Tasks			✓	
Advanced Therapy Management Has a New App	✓			
Multi-Step Scheduling License Update	✓			
<b>Integrated Care Management Enhancements</b>				
Add Social Determinants of Health in Care Plans	✓			
Visualize Care Plans Better with the Updated Interface	✓			
Guided OmniScript Flow Enhancements	✓			
Health Cloud Foundation Permission Set Now Includes Care Barriers and Care Barrier Types			✓	
<b>Provider Network Management Enhancements</b>				
Streamline Provider Enrollment with Guided Process Workflows			✓	
<b>CRM Analytics Enhancements</b>				



Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<a href="#">Expedite Health Cloud CRM Analytics Configurations</a>			✓	
<a href="#">Set Up the New Health Analytics App from Within Health Cloud</a>			✓	
<a href="#">Streamline Care Management by Using Analytics Dashboards</a>			✓	
<a href="#">Prioritize Payer Authorization Reviews Efficiently</a>			✓	
<a href="#">Prioritize Provider Care Requests Efficiently</a>			✓	
<b>Health Cloud Contact Center Enhancements</b>				
<a href="#">Easily Set Up the Contact Center with the New Guided Setup</a>	✓			
<b>Assessments Enhancements</b>				
<a href="#">Get Up and Running with Assessments by Using Guided Setup</a>			✓	
<a href="#">Navigate Assessments Component More Easily</a>		✓		
<a href="#">Send Patients Email Notifications of Assessments to Complete</a>			✓	
<a href="#">Patients Can Complete Assessments in Experience Cloud Site</a>			✓	
<a href="#">Give Patients the Option to Digitally Sign a Form</a>			✓	
<b>Medication Review and Medication Management Enhancements</b>				
<a href="#">Add Medications Faster with the New Add Basic Medication Details Flow</a>			✓	
<b>Provider Search Enhancements</b>				
<a href="#">Generate Search Reports with the Enhanced Provider Search</a>			✓	
<a href="#">Provider Search Available to Guest Users</a>			✓	
<b>Actionable Relationship Center Enhancements</b>				
<a href="#">Track Complex Household Roles and Relationships in Health Cloud</a>			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
View an Actionable Graph of Patient Relationships in Health Cloud			✓	
<b>Intelligent Document Automation Enhancements</b>				
Relate Multiple Records to a Document	✓			
Upload Documents in Experience Cloud with Intelligent Document Automation			✓	
Increased TextTract Page Limit for Intelligent Document Reader		✓		
<b>Virtual Care Enhancements</b>				
Include Calendar Files in Virtual Care Emails			✓	
Use Virtual Care in Additional Countries			✓	
<b>Salesforce Scheduler Enhancements</b>				
Manage Appointments and Assets with Salesforce Scheduler			✓	
<b>New and Changed Health Cloud Metadata Types</b>		✓		
<b>Health Cloud Has New and Changed Objects</b>		✓		
<b>New Invocable Actions in Health Cloud</b>		✓		
<b>Insurance</b>			✓	
<b>Loyalty Management</b>				
<b>View Promotions and Events on a Single Calendar</b>	✓			
<b>Tier Management</b>				
Automate Tier Assessment for Members	✓			
Automate Member Selection for Tier Assessment	✓			
<b>Save Time and Effort With Loyalty Management Mobile SDK</b>			✓	
<b>Consolidate Member Points in Real Time</b>			✓	
<b>Promotion Setup</b>				
Filter Ineligible Transactions with Ease	✓			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Let Members Opt Out of Promotions Easily	✓			
Design the Process for Redeeming Vouchers	✓			
<b>Give Partners Permissions to Edit Their Program Data</b>		✓		
<b>Give Members a Personalized Experience with the Enhanced Loyalty Management Data Bundle</b>	✓			
<b>Provide Customers the Flexibility to Join or Leave Programs and Promotions at Any Time</b>			✓	
<b>Execute More Business API Requests with Expanded Limits</b>		✓		
<b>Other Changes in Loyalty Management</b>	✓			
<b>Watch Loyalty Management Videos</b>	✓			
<b>Changed Objects in Loyalty Management</b>		✓		
<b>New and Changed Loyalty Management Metadata Types</b>		✓		
<b>New Connect REST APIs</b>		✓		
<b>Changed Connect REST API Response Bodies</b>		✓		
<b>Manufacturing Cloud</b>				
<b>Warranty Lifecycle Management</b>				
Ensure Accurate Warranty Claims Adjudication and Service Planning			✓	
Introduce a Deeper Granularity to Warranty Terms			✓	
Adjudicate Warranty Claims Easily by Capturing Detailed Claims from Partners			✓	
Adjudicate Warranty Claims with Speed and Accuracy			✓	
<b>Get a 360-Degree View of an Asset</b>			✓	
<b>Create Order Estimates During Field Work</b>			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<b>Analytics for Manufacturing Cloud</b>				
Set Up Analytics for Manufacturing Cloud More Easily				
Get Insights into Agreements, Forecasts, and Team to Manage Sales Better				
<b>Actionable Segmentation in Manufacturing Cloud (Generally Available)</b>				
Actionable List Members			✓	
Outreach List			✓	
<b>Service Experience Enhancements in Manufacturing Cloud</b>				
Action Launcher			✓	
Audit Trail			✓	
Engagement			✓	
Identity Verification			✓	
Record Alerts			✓	
Service Process Studio			✓	
<b>Data Processing Engine Enhancements</b>				
Watch Manufacturing Cloud Videos	✓			
New and Changed Objects in Manufacturing Cloud			✓	
<b>Net Zero Cloud</b>				
Allocate a Portion of Subsidiary or Partner Emissions to the Parent Company			✓	
Let Affiliate Company Users Manage Social and Governance Data			✓	
Manage The Social and Governance Data in Extended Organizations			✓	
Upload Net Zero Cloud Data Using Data Upload Templates	✓			
Other Improvements to Carbon Accounting	✓			
Track Field History for Net Zero Cloud			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<a href="#">Let Users Submit Approval Requests from a Record</a>			✓	
<a href="#">Generate a SASB Report with the Disclosure and Compliance Hub Template</a>			✓	
<a href="#">New and Changed Objects for Net Zero Cloud</a>		✓		
<a href="#">New and Changed Connect REST API Resources</a>				
<b>Public Sector Solutions</b>				
<b>Constituent Service Toolkit</b>				
<a href="#">Complete Common Service Tasks in Context with Action Launcher</a>			✓	
<a href="#">Protect Constituent Privacy and Reduce Fraud with Identity Verification and Audit Trail</a>			✓	
<a href="#">Receive Alerts on Records That Need Action</a>			✓	
<a href="#">Deliver Service to Constituents from a Dedicated Account Lightning Record Page</a>			✓	
<a href="#">Create Start-to-Finish Automation to Address Service Requests from Constituents with Service Process Studio</a>			✓	
<a href="#">Capture and Store Key Information from Constituents Applying for Benefits, Licenses, and Permits</a>			✓	
<a href="#">Create and Merge Party Relationship Groups Using Guided Workflows</a>			✓	
<a href="#">Help Agencies Manage Service Providers</a>			✓	
<a href="#">Set Up the Referral Intake Guided Flow Quickly with Out-of-the-Box Components</a>			✓	
<a href="#">Use Dynamic Assessments with Account, Contact, and Case</a>	✓			
<a href="#">Easily Manage Benefit Schedules and Sessions and Track Disbursed Benefits</a>	✓			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Use the Data Model for Case Proceedings to Manage Court and Investigative Cases			✓	
Quickly Preview Care Plans and Care Plan Templates	✓			
View Composable Case Management Objects in the Salesforce Mobile App	✓			
Award Grants to Constituents Using Grantmaking			✓	
Connect REST APIs		✓		
New and Changed Public Sector Solutions Metadata Types		✓		
Rebate Management				
Ship and Debit Process Management				
Incentivize Partners Through Effective Ship and Debit Programs			✓	
Compensate Partners for Reactive Pricing Through Special Prices and Discounts			✓	
Collaborate with Partners on Claims and Proofs of Sale			✓	
Automate Ship and Debit Claims Processing with Scalable Templates			✓	
Data Processing Engine Enhancements			✓	
New and Changed Objects in Rebate Management			✓	
Communications Cloud				
Energy and Utilities Cloud				
Industries Order Management				
Media Cloud				
Salesforce Contracts				
Salesforce for Education			✓	
Salesforce for Nonprofits			✓	
Industries Common Features				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<b>Action Launcher</b>				
Help Customers by Quickly Launching Out-of-the-Box OmniScripts	✓			
Improve Customer Experience by Quickly Switching Between Actions	✓			
Support Customers by Quickly Launching Quick Actions Containing a Visualforce Page	✓			
Increase User Satisfaction Through Enhanced Accessibility	✓			
Boost the Productivity of Contact Center Agents with Recently Used Actions	✓			
Allow Customers to Access Information and Resolve Issues by Themselves	✓			
Streamline Customer Engagement by Quickly Launching Engagement Interaction Actions	✓			
<b>Action Plans</b>				
Include More Task Dependencies in Action Plan Templates			✓	
<b>Actionable List Members</b>				
Large Actionable Lists Are Configured Asynchronously	✓			
Manage Engagement Status of Prospects Efficiently	✓			
Save Time and Improve Efficiency Using Bulk Actions	✓			
Sort Prospects to Enhance Team's Success	✓			
Changed Object in Actionable List Members		✓		
<b>Actionable Segmentation</b>				
Select Dataset Records in Bulk for Actionable Lists	✓			
Filter Dataset Records Smarter with Custom Filter Logic	✓			
Share Actionable Lists with Colleagues	✓			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Help Executives Manage Actionable Lists Better with List Status			✓	
Sort Dataset Records in Actionable List Builder	✓			
Customize the Display Format for Dataset Fields in Actionable List Builder	✓			
Delete Unneeded Actionable List Definitions		✓		
Track API Call Usage and License Validity for Queries for DataPipelines		✓		
New and Changed Objects		✓		
Metadata API		✓		
<b>AI Accelerator and Scoring Framework</b>				
AI Accelerator				
Scoring Framework (Generally Available)				
<b>Audit Trail</b>				
Monitor Secondary Identity Verification Audit Records to Ensure Privacy and Security of Customers	✓			
Experience Better User Interface with All Your Filters in One Place	✓			
Use New Filters to Improve Efficiency by Quickly Finding Information	✓			
Expand Your Insights with New Columns for Making Informed Decisions	✓			
Drill Down to Quickly Access Detailed Information for Better Decision Making	✓			
Export Audit Trail Records Effortlessly and Unlock Their Full Potential	✓			
Manage Exported Data and Ensure Customer Privacy with Audit Trail Export Dashboard	✓			
<b>Batch Management</b>				
Changed Object in Batch Management		✓		
<b>Business Rules Engine</b>				



Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Export Decision Matrix Versions for Reuse Outside Business Rules Engine	✓			
Use Currency and Date/Time Data Types in Decision Tables	✓			
Clone Expression Sets	✓			
Capture Action Logs for Expression Sets Called from Salesforce Flow	✓			
View Business Elements as First-Level Elements in Expression Set Builder	✓			
Simulate Expression Set Versions Using JSON Input	✓			
Changed Object in Business Rules Engine				
Connect REST APIs		✓		
New and Changed Business Rules Engine Metadata Types		✓		
<b>Data Processing Engine</b>				
Use Today's Data to Make Business Decisions for the Future		✓		
Use Variables of Type Expression as Placeholders in Definitions		✓		
New and Changed Data Processing Engine Metadata Type		✓		
<b>Discovery Framework</b>				
Edit the Signature on the Assessment Signature Component		✓		
Discovery Framework Support for Guest Users				
New Discovery Framework Object Field		✓		
<b>Einstein Relationship Insights</b>				
Amplify Your Connections by Exploring Case Notes			✓	
<b>Engagement</b>				
Improve Customer Satisfaction by Providing Support Through Social Channels	✓			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<a href="#">Access Your Records Quickly with New List View Filters</a>	✓			
<a href="#">Enjoy Enhanced User Interface Performance with LWC Framework</a>	✓			
<a href="#">Increase User Satisfaction Through Enhanced Accessibility</a>	✓			
<a href="#">Access Actions Conveniently with LWC Quick Actions</a>	✓			
<b>Identity Verification</b>				
<a href="#">Verify Customer Identity in Social Channels</a>	✓			
<a href="#">Configure Linked Record Page to Align the Identity Verification Process with Business Requirements</a>	✓			
<a href="#">Improve Security Using Form Fields During Identity Verification Process</a>	✓			
<a href="#">Clone the Renamed and Updated Verification Flows for Clarity and Consistency</a>	✓			
<a href="#">Changed Object in Identity Verification</a>		✓		
<a href="#">New Connect REST API Resources</a>		✓		
<b>Industry Integration Solutions</b>				
<a href="#">Complete Your Business Use Case Quickly by Enabling Dependent Apps</a>			✓	
<b>Intelligent Document Reader</b>				
<a href="#">Extract Text and Get Template Details Automatically</a>		✓		
<a href="#">New Invocable Actions in Intelligent Document Reader</a>		✓		
<a href="#">New Intelligent Document Reader Metadata Types</a>		✓		
<a href="#">Connect REST API</a>		✓		
<a href="#">DocumentReader Namespace</a>				
<b>Intelligent Form Reader</b>				
<a href="#">Extract Text and Get Template Details Automatically</a>		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
New Invocable Actions in Intelligent Form Reader		✓		
New Intelligent Form Reader Metadata Types		✓		
Connect REST API		✓		
<b>Outreach List</b>				
Do More with the New Outreach List UI	✓			
Prioritize Actionable Lists	✓			
Improve Navigation Through Information Using Accordion View	✓			
Call Prospects and Manage Status Within the UI	✓			
New Connect REST API Resources		✓		
<b>Record Alerts</b>				
Turn on Record Alert Access			✓	
Create Record Alerts Using Business Rules Engine			✓	
Show Alerts from Your External System			✓	
New Record Alerts Object			✓	
<b>Service Process Studio</b>				
Save Time and Effort by Cloning Service Process Definitions		✓		
View All Data Attributes of a Service Process Easily with Case Details Lightning Component			✓	
Improve Readability by Grouping Related Data Attributes		✓		
Add Lookup Type Data Attributes to Quickly Access Related Records		✓		
New and Changed Metadata APIs for Service Process Studio		✓		
Changed Objects for Service Process Studio		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<a href="#">New and Changed Connect REST API Resources</a>		✓		

## Marketing Cloud Account Engagement

Use external actions as completion actions on Account Engagement assets. Account Engagement Optimizer is now generally available and includes monitoring for critical configuration issues. Plus, get retroactive activity data when prospects opt in to tracking.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<b>General Enhancements</b>				
<a href="#">Trigger an External Action After a Prospect Engagement</a>			✓	
<a href="#">Keep Your Account Engagement Business Unit Running Smoothly with Optimizer (Generally Available)</a>				
<a href="#">Monitor the Source of Prospect Changes</a>		✓		
<a href="#">Convert Unused Dynamic Lists to Static Lists</a>		✓		
<a href="#">Use Data Cloud Segments in Account Engagement</a>			✓	
<a href="#">Use a New Opted Out Field Status</a>				
<a href="#">Copy Assets Between Account Engagement Business Units More Easily</a>			✓	
<a href="#">Account Engagement Trust Site Is Moving</a>	✓			
<a href="#">Get First-Touch Attribution When Visitors Consent to Tracking</a>				
<a href="#">Email Report Print Count Fields Are Being Removed</a>	✓			
<b>APIs and Integrations</b>				
<a href="#">Account Engagement API: New and Changed Items</a>		✓		
<a href="#">The AddThis Connector Is Being Removed</a>				

## Mobile

Salesforce Mobile App Plus is now generally available. The operating system requirements for the Salesforce mobile app have changed. Mobile Publisher for Experience Cloud apps can now require app updates natively and with a 15-day grace period.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<b>Salesforce Mobile App</b>				
<b>Everything That's New in the Salesforce Mobile App</b>				
Salesforce Mobile App Requirements Have Changed	✓			
See Recent Changes in Forecast Categories			✓	
Salesforce Mobile App Plus Is Generally Available			✓	
Access Your Analytics Collections on Salesforce Mobile	✓			
Mobile Offline Is Generally Available				
Offline App Onboarding Wizard Is Generally Available				
Migrate Security Policies to the Mobile Security Setup UI	✓			
Salesforce Mobile App Version 228 Is Retired		✓		
The Salesforce Mobile App Community License Access Retirement Is Paused			✓	
Enable Dynamic Forms on Mobile (Beta)			✓	
New BarcodeScanner Features Available for the Salesforce Mobile App		✓		
<b>Mobile Publisher</b>				
Highlight Android Device Runtime Permissions With New In-App Request Workflow		✓		
Link to Your Experience Cloud App's Privacy Policy From the Login Page		✓		
Get Native Updates for Experience Cloud Apps		✓		
Require Experience Cloud App Users to Update Their Apps After 15 Days		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<a href="#">Delete the Mobile Publisher App Update Component from Your Sites</a>		✓		
<a href="#">New BarcodeScanner Features Available for Mobile Publisher Applications</a>		✓		
<b>Briefcase Builder</b>				
<a href="#">Deleted Field Is Deprecated as a Briefcase Filter</a>			✓	

## Revenue

Bundle your products and services in Subscription Management, and decrease subscription quantities. Price and bill annually, configure more discounts, and turn off invoicing and payment features in Subscription Management. Create quote templates faster in Salesforce CPQ Plus.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<b>Subscription Management</b>				
<a href="#">Sell Bundled Products and Services</a>			✓	
<a href="#">Decrease the Quantity of a Subscription</a>			✓	
<a href="#">Price Product Subscriptions Annually</a>	✓			
<a href="#">Bill Your Customers Annually</a>		✓		
<a href="#">Configure Discounts for Subscriptions with Longer Terms</a>		✓		
<a href="#">Use Subscription Management Without Its Invoicing and Payment Features</a>			✓	
<a href="#">Get Insightful Details at Every Step of Quote Calculation</a>	✓			
<b>Salesforce CPQ</b>				
<a href="#">Create Quote Templates Faster Using OmniStudio Document Generation</a>		✓		

## Sales

Sales teams can do their jobs faster and more effectively with these new products and feature enhancements. Allocate revenue at a more granular level for complex sales deals with opportunity product splits, and use opportunity product splits in reports and forecasts.

Manage the timing of cadence steps and see cadence usage data in Sales Engagement. Share call transcripts, insights, and action items with more users in Einstein Conversation Insights, which now support more languages and voice providers. Arm your sales teams with key information from the Sales Rep Command Center in Revenue Intelligence. And get more insights into sales forecasts with charts and external data in custom columns.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<b>Sales Basics</b>				
<b>Opportunities</b>				
Split Revenue by Product Mix with Opportunity Product Splits (Generally Available)			✓	
<b>Quotes</b>				
Create Quotes Without a Related Opportunity			✓	
<b>Calendar</b>				
Maximize Your Productivity with Calendar Enhancements			✓	
Click Once to See Your Calendar	✓			
Encourage Repeat Orders Using a Commerce Reorder Portal			✓	
<b>Sales Engagement</b>				
Manage Cadence Step Timing More Precisely	✓			
Cadence Wait Steps Are Being Retired	✓			
Let Users Control When Cadence Tasks Are Assigned to Them			✓	
Repeat Outreach Steps with Quick Cadences			✓	
See Prospect Engagements for the Month at a Glance	✓			
Discover Which Cadences Have the Most Activity			✓	
Let Managers Speed Up Common Cadence Tasks for Their Teams with Automated Actions			✓	
Set Automated Actions to Remind Users Instead of Acting Automatically			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<a href="#">Find Items Quickly in the To Do List with Search</a>	✓			
<a href="#">Manage Flow Orchestration Work Items in the To Do List</a>	✓			
<a href="#">Accelerate Sales Cycles with a Buyer Assistant (Beta)</a>			✓	
<a href="#">Sales Cloud Now Includes Quick Cadences and Email Productivity Features in Professional and Enterprise Editions</a>			✓	
<b>Einstein Conversation Insights</b>				
<a href="#">Use Einstein Conversation Insights in Different Languages</a>	✓			
<a href="#">Turn On Optimal Speaker Separation</a>			✓	
<a href="#">Add More Voice Providers</a>			✓	
<a href="#">More Reports Are Available for All Users</a>	✓			
<b>Revenue Intelligence</b>				
<a href="#">Empower Sales Reps with the Revenue Intelligence Command Center</a>	✓			
<a href="#">View Sales Details About Your Territories in Revenue Insights</a>	✓			
<a href="#">Understand Your Sales Pipeline with the Sales Stage Analysis Dashboard</a>	✓			
<a href="#">Find Your Untapped Opportunities Using Product Whitespace</a>	✓			
<a href="#">Get Even More Details About Deals to Focus On</a>	✓			
<a href="#">Access Revenue Insights Directly from Your Mobile Device</a>	✓			
<b>Pipeline Inspection</b>				
<a href="#">Use Expanded Filters to View More Deals and Pipelines in Pipeline Inspection</a>			✓	
<a href="#">Get Sales Teams Started with Pipeline Inspection Fast</a>		✓		



Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<a href="#">Get Pipeline Inspection in Enterprise Edition Without an Add-On License</a>			✓	
<a href="#">Update Opportunities More Efficiently in Pipeline Inspection</a>	✓			
<b>Collaborative Forecasts</b>				
<a href="#">Assess the Health of Your Sales Forecasts with Built-In Charts</a>			✓	
<a href="#">Add Custom Columns That Include External Data</a>			✓	
<a href="#">Forecast on Opportunity Product Splits</a>			✓	
<a href="#">View Einstein Predictions in a Full-Length Panel</a>			✓	
<a href="#">See Recent Forecast Changes in the Salesforce Mobile App</a>			✓	
<b>Enablement for Sales Teams</b>				
<a href="#">Find Out What's New for Enablement</a>			✓	
<b>Partner Relationship Management</b>				
<a href="#">PRM for Slack Features</a>				
<b>Sales Performance Management</b>				
<b>Sales Planning (Generally Available)</b>				
<a href="#">Plan Sales Strategies as a Team</a>			✓	
<b>Territory Planning</b>				
<a href="#">Update Large Territory Models in Less Time</a>	✓			
<a href="#">Assign Units Using Boundaries That You Define</a>	✓			
<a href="#">Other Improvements in Territory Planning</a>	✓			
<b>Enterprise Territory Management</b>				
<a href="#">Work as a Team to Win Over Leads</a>			✓	
<a href="#">Manage Your Territories While Others Run Rules for Theirs</a>			✓	
<b>Salesforce Maps</b>				
<a href="#">Manage Utility Service Lines from the Map</a>	✓			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Visualize and Manage Selected Markers	✓			
Plot Records from Salesforce and Show Other Relevant Ones Using Dynamic Filters	✓			
Apply Mass Actions from the Marker Legend	✓			
Remove Salesforce Maps Headers and Buttons from Custom Actions Windows	✓			
Set ArcGIS Layers to Plot When Reps Open Salesforce Maps	✓			
Add Predefined Fields That Appear in Scheduled Events	✓			
Basemap for Nearby Maps was Changed	✓			
<b>Salesforce Maps Advanced</b>				
Simplify Reps' Schedules by Eliminating Repeat Visits During Shifts	✓			
<b>Apply Updates to Custom Permission Sets for Salesforce Maps Products</b>			✓	
<b>Sales Cloud Einstein</b>				
<b>Personalize Sales Emails with Einstein GPT for Sales</b>				
<b>See an Enhanced Prediction Trends Graph</b>			✓	
<b>Einstein Account Insights and Opportunity Insights Are Being Retired</b>	✓			
<b>Integration with Other Products</b>				
<b>Einstein Activity Capture</b>				
Fix Connection Issues Easily with Status Reasons		✓		
Get More Control Over What Data Is Captured		✓		
Gain More Visibility with Data Capture Metrics		✓		
<b>Salesforce for Outlook (Retiring)</b>				
Salesforce for Outlook Is Retiring in June 2024		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<b>Gmail Integration</b>				
Save Time by Using Salesforce in a Side Panel While Browsing the Web in Chrome	✓			
<b>Salesforce Meetings</b>				
Nail Your Meetings with Salesforce Meeting Digest	✓			
Set Your Available Times for Meetings	✓			
<b>Meeting Studio is Being Retired</b>				
<b>Email Experience</b>				
Send a Meeting Request Quickly from the Dynamic Activity Composer	✓			
Propose Three Future Meeting Times in Lightning Experience	✓			
Save Space by Tracking External Email Only		✓		
Use an Organization-Wide Email Address to Send Automated Process Emails			✓	
Control Who Can Use Organization-Wide Email Addresses			✓	
Give Email Recipients Confidence in the Sender's Identity			✓	
Verify Email Sender Legitimacy with DMARC and DKIM		✓		
Sales Cloud Now Includes Email Productivity Features in Professional and Enterprise Editions			✓	
<b>Salesforce Inbox</b>				
Inbox Mobile App	✓			

## Salesforce CMS

Create workflows and streamline approvals in enhanced CMS workspaces. Manage CMS content from the improved content detail page. Manage unlimited content with Salesforce CMS. Create enhanced CMS channels to associate with enhanced CMS workspaces.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Create Workflows and Streamline Approvals in Enhanced CMS Workspaces (Generally Available)		✓		
Manage CMS Content from the Improved Content Detail Page	✓			
Use the Manage Menu for CMS Content and Translations in Enhanced CMS Workspaces	✓			
Navigate Your Enhanced CMS Content with Search Improvements	✓			
Use Salesforce CMS to Manage Unlimited Content with All Salesforce Licenses	✓			
View Content References in Usage Info Tab on Detail Page	✓			
Create Enhanced CMS Channels		✓		

## 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 (Generally Available)		✓		
Send Salesforce Data to an External Server Without Code via HTTP Callout (Beta)		✓		
Build Screens with Reactive Components (Beta)		✓		
Update the Screen in Real-Time using Formulas (Beta)		✓		
Log Emails Sent with the Send Email Action		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Use Email Templates in the Send Email Action		✓		
Get Records from Data Cloud Objects in Flow Builder		✓		
Search and Display Data Table Results in Screen Flows		✓		
Provide Users a List of Choices for Easy Selection with Choice Lookup (Generally Available)		✓		
Use Security Center Objects in Flows		✓		
Get Field Visibility Errors during Flow Runtime		✓		
Get Improved Accessibility in Flow Builder with New Element Colors		✓		
View More Elements on the Flow Builder Canvas		✓		
Reference Choice Sets Only in Choice Components		✓		
<b>Flow Trigger Explorer</b>				
View Standard Flows in Flow Trigger Explorer		✓		
<b>Flow Management</b>				
New Process Creation Is No Longer Available		✓		
Convert More Processes to Flows with the Migrate to Flow Tool		✓		
Delete Flows from Second-Generation Managed Packages		✓		
Find Flow User Permissions More Easily		✓		
<b>Flow Extensions</b>				
Import REST APIs Directly from MuleSoft Services			✓	
Use Multi-Select Picklists with Flow in Slack		✓		
Use More Data Types as Slack Input Parameters		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<b>Flow and Process Release Updates</b>				
Evaluate Criteria Based on Original Record Values in Process Builder (Release Update)			✓	
Prevent Guest User from Editing or Deleting Approval Requests (Release Update)			✓	
Disable Rules for Enforcing Explicit Access to Apex Classes (Release Update)			✓	
Enable EmailSimple Invocable Action to Respect Organization-Wide Profile Settings (Release Update)			✓	
Enforce Rollbacks for Apex Action Exceptions in REST API (Release Update)			✓	
Disable Access to Session IDs in Flows (Release Update)		✓		
Make Paused Flow Interviews Resume in the Same Context (Release Update)			✓	
<b>Flow Orchestration</b>				
Get Refreshed Record Variables When an Orchestration Resumes		✓		
Control the Running Context of an Orchestration		✓		
Create Steps to Run MuleSoft Actions		✓		
Add Custom Information to Flow Orchestration Logs		✓		
See Orchestration Work Items on the To Do List		✓		
Enable Sharing for Flow Orchestration Objects (Release Update)			✓	
Other Improvements		✓		
<b>OmniStudio</b>				
Get a Better Screen Reader Experience with Accessibility Improvements		✓		
Standard OmniStudio Runtime Name Is Changing		✓		
OmniStudio Minor Release Updates				✓

## Security, Identity, and Privacy

Multi-factor authentication (MFA) and enhanced domains rollouts continue. Track file activities with File Event for Event Monitoring. Automate processes for Security Center data with flows. Build native identity experiences with new and improved Headless Identity APIs. And host preference forms via your own Salesforce instance.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<b>Backup and Restore</b>				
<b>Set Up and Maintain Backups More Easily</b>				
<b>Filter and Restore Data More Easily</b>			✓	
<b>Domains</b>				
<b>Deploy Enhanced Domains (Release Update)</b>			✓	
<b>Prepare for the Move to Salesforce Edge Network</b>		✓		
<b>Continue to Log My Domain Redirections</b>		✓		
<b>Identify the Origin of Requests to Previous My Domain URLs</b>		✓		
<b>Configure and Maintain Custom Domains with Confidence</b>		✓		
<b>Validate Your Sandbox Custom Domains</b>		✓		
<b>Identify Salesforce-Hosted Site Domains with Ease</b>		✓		
<b>Update the Target Hostname for Custom Domains Served by a Third-Party Service or CDN</b>		✓		
<b>Other My Domain Changes</b>		✓		
<b>Identity and Access Management</b>				
<b>MFA Auto-Enablement Continues: Find Out When and How Your Org Is Affected (Release Update)</b>				
MFA Auto-Enablement Comes with an Improved Registration Experience		✓		
<b>Use Salesforce MFA for SSO Logins</b>		✓		
<b>Optimize Registration for Identity Verification Methods</b>		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<a href="#">Use TOTP Codes from Salesforce Authenticator More Easily</a>	✓			
<a href="#">Configure Identity Verification Settings in One Location with an Improved User Interface</a>		✓		
<a href="#">Use OAuth 2.0 Hybrid Flows for Secure Authorization</a>			✓	
<a href="#">Track Insecure Login Flows Through Real-Time Event Monitoring</a>			✓	
<a href="#">Monitor Login Conditions in the Enhanced Transaction Security Framework</a>			✓	
<a href="#">OAuth 2.0 Username-Password Flow Blocked by Default in New Orgs</a>		✓		
<a href="#">Take the Reins on Your User Registration Experiences with Headless Registration</a>			✓	
<a href="#">Specify a User's Verification Method in the Body of Headless Registration Requests</a>			✓	
<a href="#">Improve Security for the Headless Forgot Password Flow</a>			✓	
<a href="#">Build a Native Single Sign-On Experience in a Third-Party App</a>			✓	
<a href="#">Take More Control of Self-Registration for Customers and Partners</a>			✓	
<a href="#">Enhance Your Authorization Flow Efficiency with JSON Web Token (JWT)-Based Access Tokens (Beta)</a>			✓	
<a href="#">API Only Users Are Restricted from Accessing the User Interface via frontdoor.jsp</a>	✓			
<a href="#">Authorize Apps to Access All Data Cloud Resources</a>			✓	
<a href="#">Upgrade to Identity Connect 7.1.5</a>			✓	
<a href="#">Identity Connect 3.0.1.2 Security Patch Is Being Removed</a>			✓	



Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<a href="#">Verify User Email Addresses</a>		✓		
<a href="#">Update U2F Security Keys to Support WebAuthn Authentication</a>	✓			
<a href="#">Set Your Users' Session Timeout to 90 Minutes</a>			✓	
<a href="#">See When an Access Token Response Contains a JSON Web Token (JWT)-Based Access Token (Beta)</a>			✓	
<a href="#">Use the OAuth Client Credentials Flow in More Editions</a>		✓		
<a href="#">Hover Text Label for Client Credentials Flow Execution User Is Changed</a>		✓		
<b>Privacy Center</b>				
<a href="#">Host Preference Forms without a Website</a>		✓		
<a href="#">Track Consent Objects with Field Audit Trail</a>		✓		
<a href="#">Earn Badges for Preference Manager</a>		✓		
<b>Salesforce Shield</b>				
<b>Event Monitoring</b>				
<a href="#">Track File Usage in Near Real-Time with FileEvent (Generally Available)</a>			✓	
<a href="#">Opt in for Event Log File Generation (Release Update)</a>			✓	
<a href="#">Dig into Details About Page Load Times</a>			✓	
<a href="#">Track the Source of My Domain Redirections</a>		✓		
<a href="#">Track Insecure Login Flows</a>			✓	
<a href="#">View Knowledge Article Event Data in Event Monitoring Analytics Apps</a>			✓	
<a href="#">Streamline Dataset Updates for the Event Monitoring Analytics App (Beta)</a>			✓	
<a href="#">Track API Usage for All API Versions</a>		✓		
<b>Field Audit Trail</b>				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Track and Audit Consent Management Data		✓		
<b>Shield Platform Encryption</b>				
Track Platform Encryption Data from Security Center		✓		
Encrypt More Patient Health Data			✓	
Access More Shield Platform Encryption Features with Assistive Technology			✓	
<b>Security Center</b>				
Automate Processes for Security Center Data with Flows		✓		
Simplify Encryption Policy Management with the Encryption Policies Metric		✓		
Assure Tenant Security by Tracking External Logins		✓		
Security Center Is Now Compatible with Government Cloud (Generally Available)		✓		
Deploy Mobile App Security Policies with the New Mobile App Security Policy Type		✓		
<b>Data Mask</b>				
Get Improved Unique Field Masking (Release Update)		✓		
Process Data Mask Jobs Faster (Release Update)		✓		
<b>Other Changes</b>				
Enable Content Sniffing Protection (Release Update)			✓	
Map External Credential Principals to Permission Sets and Profiles			✓	
Fine-Tune Access by Linking OAuth Scopes to Principals			✓	
Create Named Credentials with the Expanded Connect API			✓	
Customize When to Share Sensitive Information in Your URLs		✓		

## Service

Transform conversation data into service insights and build bot intents with Einstein Conversation Mining (beta). Update replies with on-demand template creation in Reply Recommendations. Add prebuilt functionality to multiple bots with Bot Blocks (beta). Give your customers and partners advanced self-service automation with the Service Catalog. Record and send voice messages in enhanced Messaging channels. Add business hours to Messaging for In-App and Web. Use flows to link leads, contacts, employees and person accounts to interactions in all channels with Individual-Object linking. Create broadcast Slack messages with custom templates for Customer Service Incident Management. Get survey responses from unauthenticated guest users via APIs in Feedback Management.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<b>Einstein for Service</b>				
<b>Einstein Bots</b>				
Teach Your Bot New Languages More Easily with the Cross-Lingual Intent Model (Beta)		✓		
Build Bots Faster Using Einstein Bot Blocks (Beta)		✓		
Add New Functionality to Existing Bots with New Blocks (Beta)		✓		
Reach More Customers with Multi-Language Support for System Bot Templates (Beta)		✓		
<b>Enhanced Bots</b>				
Streamline Your Building Experience with Direct Invocation of Standard Actions		✓		
Use Conditional AND/OR Statements in Rule Action Dialog Steps to Customize Your Bot		✓		
Build Bots Faster with Dialog Component Library Updates		✓		
Discover Developer Updates with the Einstein Bots API (Generally Available) and API Release Notes		✓		
Monitor Bot Sessions More Accurately with Standard Report Improvements		✓		
AnalyticsBotSession Object Was Removed		✓		
Run Flows in Bot User Context (Release Update)			✓	
<b>Einstein Classification</b>				
Close Cases Faster with Work Summaries			✓	
<b>Einstein Conversation Mining (beta)</b>				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Build Better Reports with Case Object Segmentation				
Include Email Conversations When You Build Your Conversation Mining Reports (Pilot)				
Get Service Insights and Build Bot Intents with Einstein Conversation Mining (beta)				
<b>Einstein Reply Recommendations</b>				
Optimize Agent Productivity and Response Quality with Service Replies			✓	
Refresh Your Replies with On-Demand Template Creation			✓	
Offer Agents Reply Recommendations in Enhanced Messaging Channels			✓	
Enhance Your Reply Recommendations Model			✓	
<b>Service Catalog</b>				
<b>Deliver Products and Services with Service Catalog (Generally Available July 18, 2023)</b>	✓			
<b>Open Your Service Catalog to Customers and Partners</b>			✓	
<b>Expanded Access to Uploaded Images</b>	✓			
<b>Channels</b>				
<b>Messaging</b>				
Send Voice Messages in Enhanced Messaging Channels	✓			
Send Messaging Components in Enhanced WhatsApp Channels	✓			
Let Messaging for In-App and Web Conversations Continue Across Multiple Channels		✓		
Hide the Messaging for In-App or Web Button Outside of Your Business Hours		✓		
Control the Messaging for Web Button's Visibility Programmatically on Your Website		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Identify the Messaging Customer with Individual-Object Linking		✓		
Create Real-Time Keyword Alerts for Supervisors in Messaging Channels		✓		
Automatically Mark Messaging Sessions Inactive in Messaging for In-App and Web		✓		
Mark Messaging Sessions Inactive in the Conversation Window	✓			
Message Customers More Intuitively with the Redesigned Agent Conversation Window	✓			
Add Dropdown Fields to Your Pre-Chat Form in Messaging for In-App and Web		✓		
Choose When to Show a Pre-Chat Form in Messaging for In-App and Web		✓		
Modernize Your Channel Menu with Messaging for Web		✓		
Let Agents Accept Omni-Routed Messaging Sessions in Messaging for In-App and Web		✓		
Fine-Tune Messaging Session Expiration to Accommodate Your Security Requirements		✓		
Let Customers Navigate Your Website While Maintaining a Messaging for Web Conversation		✓		
Say Goodbye to the Messaging for In-App and Web SKU		✓		
Align Your Business with New Certifications in Messaging		✓		
End Conversations and Engage Bots with the Enhanced Bot Options Menu		✓		
Add User Verification to Messaging for Web in Aura Sites		✓		
Find the Right Answer to a Customer's Question with Reply Recommendations in Messaging		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Improve the Enhanced Messaging Console Experience Using the Lightning Conversation Toolkit API		✓		
Other Improvements to Messaging for In-App and Web		✓		
<b>Voice</b>				
Add More AWS Services to Service Cloud Voice with Amazon Connect				✓
Get Agents Online Faster with the Voice Status Utility			✓	
Make More Calls Faster with Agent-to-Agent Calls		✓		
Automate Softphone Call Control Events		✓		
Access Service Cloud Voice with Microsoft Edge (Chromium)	✓			
Scale Amazon Connect Queue Management with Your Contact Center			✓	
Show Voice Extensions for Pre- and Post-Call Work			✓	
Pass Custom Field Data During Transfers and Callbacks		✓		
Create Amazon Connect Instances for Service Cloud Voice with Confidence		✓		
Fine-Tune After Conversation Work Times for Efficiency			✓	
Set Up Voice Faster Using an Existing Amazon Connect Instance			✓	
Get the Latest Enhancements for Your Amazon Connect Contact Center			✓	
Resolve Setup Issues More Quickly with Self-Service Checks (Beta)	✓			
Check Voice Channel Performance with More Metrics (Pilot)				✓
<b>Channel Tools</b>				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Identify the Human Behind the Interaction with Individual-Object Linking (Beta)		✓		
Add Messaging for Web to Your Channel Menu		✓		
Export Messaging and Voice Conversation Transcripts Before You Leave Salesforce		✓		
Increase Agent Productivity with Automated Actions Using Keyword Detection			✓	
Alert Supervisors and Agents Based on Conversation Intelligence Signals and Keywords			✓	
<b>Swarming</b>				
Get the Enhanced Slack Conversations Experience			✓	
Extend Swarming to Field Service Workers			✓	
See Slack Channel Names in Swarming Reports			✓	
Start a Swarm Faster with Searchable Slack Channels			✓	
Catch Up on Service Cloud for Slack App Features			✓	
<b>Incident Management</b>				
Stay on Top of Incidents with the Enhanced Incident Alerts Utility			✓	
Send Custom Incident Updates with Broadcast Slack Message Templates				
<b>Routing</b>				
Monitor Contact Center Health in the Omni Supervisor Wallboard (Pilot)				✓
Route Work Orders to Field Service Workers				✓
Get Supervisors Involved Fast with Conversation Intelligence				✓
<b>Knowledge</b>				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Enable Lightning Article Editor and Article Personalization for Knowledge (Beta) (Release Update)			✓	
Run the Lightning Knowledge Migration Tool			✓	
Grow Your Knowledge Base and Handle Complex Hierarchies with Confidence			✓	
Set Knowledge Article Review Dates with the Next Review Date Field			✓	
Schedule a Knowledge Article to Publish at a Specific Time			✓	
Insert Knowledge Articles Quickly on LWR Sites			✓	
Cases				
Transition to the Lightning Editor for Email Composers in Email-to-Case (Beta) (Release Update)			✓	
Save Time by Linking Contacts to Cases in Email-to-Case			✓	
Allow Updates to Email Message Related Records to Meet Business Rules			✓	
Find Email Messages Faster with Improved Searches			✓	
Disable Ref ID and Transition to New Email Threading Behavior (Release Update)			✓	
Use a Default No-Reply Address as System Address for Case Email Notifications (Release Update)	✓			
The Ref ID Format for Email-to-Case is Changing			✓	
Feedback Management				
Receive Responses from Unauthenticated Guest Users via APIs	✓			
Alert Users with Custom Notifications for Survey Responses	✓			



Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<a href="#">Get a Quick Timeline View of Survey Responses</a>	✓			
<a href="#">Get Alerts Based on Survey Responses</a>	✓			
<a href="#">Get Granular Details on Survey Emails to Multiple Recipients</a>	✓			
<a href="#">Feedback Management Videos</a>	✓			
<b>Self-Service</b>				
<a href="#">Add Knowledge Pages to Your Enhanced LWR Site</a>	✓			
<a href="#">Customize Knowledge Articles with the Knowledge Article Component</a>	✓			

## Supported Browsers

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

### IN THIS SECTION:

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

See the supported browsers and devices for Lightning Experience.

#### [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.

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.

	<b>Microsoft® Internet Explorer®</b>	<b>Microsoft® Edge (non-Chromium)</b>	<b>Microsoft® Edge Chromium</b>	<b>Google Chrome™</b>	<b>Mozilla® Firefox®</b>	<b>Apple® Safari®</b>
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.

	<b>Apple® Safari®</b>	<b>Google Chrome™</b>	<b>Other Browsers</b>	<b>Salesforce Mobile App</b>
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.

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



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

## Supported Browsers for CRM Analytics

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

## Salesforce Overall

---

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

## IN THIS SECTION:

[General Enhancements](#)

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

[Salesforce Scheduler](#)

Manage the customers who visit your business locations for drop-in appointments.

[Einstein Search](#)

Improve how you receive your search results. With Search Manager, configure searchable standard and custom objects, even picklists, to see information related to your work. You can also receive specific answers from a knowledge article with Einstein Search Answers.

## General Enhancements

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

## IN THIS SECTION:

[Multi-Factor Authentication \(MFA\) Auto-Enablement Continues with Summer '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 satisfy this requirement, Salesforce is automatically enabling MFA for direct logins. The first MFA auto-enablement phase occurred during Spring '23. Additional phases are scheduled for the next several major releases, concluding with Spring '24. In the future, Salesforce plans to enforce MFA by making it a permanent part of the login process. To avoid disruptions to your users when these milestones occur, enable MFA as soon as possible.

[See Improved Color Contrast in UI Elements](#)

Make your content easier to see and use for people with low vision. Non-text UI elements, such as buttons and checkboxes, and some text UI elements, such as links, now appear with improved color contrast to align with accessibility standards. These color changes affect Salesforce Lightning Design System (SLDS), Lightning base components, and a subset of record home pages.

[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.

[See Tenant IDs in the Your Account App](#)

Now you can see the ID of your Salesforce org, Tableau deployment, Mulesoft org, Commerce Cloud tenant, and your Marketing Cloud MID (Member ID) in the contracts area of the Your Account app. When you purchase a product, it's assigned and provisioned to a specific tenant. Seeing tenant IDs in your contracts list helps you monitor license usage by tenant.

[Manage More Products with the Your Account App](#)

Manage your Marketing Cloud subscriptions from the Your Account app, a self-service solution. For example, you can add more licenses without calling your Salesforce rep.

[Undo Field Changes with a Click](#)

When you type in an input field on a Lightning Web Components record page, an undo button appears and the background color changes until you save. Clicking the undo button removes your unsaved changes. This functionality doesn't occur in Dynamic Forms—enabled pages. Previously, to use the undo button, you clicked a field, entered content, and then clicked outside the field.

[Experience Improved Performance on More Record Home Pages](#)

With Lightning Web Components (LWC)-enabled objects, you can create, view, or edit the record home pages with improved performance, stronger accessibility support, and better service availability. Over 100 more objects now use LWC to render record home pages, bringing the total objects to over 1,000.

### [Get Better Performance for Related Lists](#)

The related list View All page now renders using Lightning Web Components (LWC) instead of Aura, improving user experience and providing stronger accessibility support. Using LWC, the full list of related records loads earlier and renders faster.

### [New Salesforce Feedback Management Developer Guide](#)

Check out the new Salesforce Feedback Management Developer Guide that brings all the Salesforce Feedback Management developer resources to one place.

### [See Object Names in Record Tabs and Subtabs](#)

When viewing or inline editing a record, Salesforce displays record information, object name, and Salesforce in the tab name. It displays record information and the object name in the subtab name. The object name doesn't appear when fully editing a record in Lightning, but it appears when fully editing a record in Lightning Console. Previously, Salesforce displayed only record information and Salesforce in the tab name and record information in the subtab name when viewing or editing a record. This change applies to RRH-enabled objects.

### [Feedback Form in Salesforce Help Menu Is Being Retired](#)

The Give Feedback to Salesforce option in the Salesforce Help menu and the corresponding feedback form are scheduled for retirement when Summer '23 is released. To continue submitting feedback about your experience in Salesforce, contact your account executive. Or, for help with a specific issue, submit a Salesforce Customer Support case.

### [News, Automated Account Fields, and Account Logos Are Being Retired](#)

The News, automated account fields, and automated account logo features are being retired in all Salesforce orgs in Winter '24 on October 13, 2023. After these account features are retired, Salesforce doesn't prompt users with suggestions for account names and doesn't fill out fields or add company logos automatically. The News component is removed from page layouts.

### [Send Survey Invitations to Unauthenticated Participants](#)

Send survey invitations to unauthenticated participants by using the Salesforce Feedback Management (SFM) unAuth Response APIs.

### [Set a Password or Expiration on a Public Link to a Salesforce File](#)

In Lightning Experience, when you create a public link to share a file, you can choose to set a date when the link expires. You can also protect access to the file with a password. By default, link expiration is enabled and set for 90 days, and password protection is off by default. When password protection is toggled on, an auto-generated password shows in the dialog.

## Multi-Factor Authentication (MFA) Auto-Enablement Continues with Summer '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 satisfy this requirement, Salesforce is automatically enabling MFA for direct logins. The first MFA auto-enablement phase occurred during Spring '23. Additional phases are scheduled for the next several major releases, concluding with Spring '24. In the future, Salesforce plans to enforce MFA by making it a permanent part of the 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 org is affected, see [MFA Auto-Enablement Continues: 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, implement and roll out MFA on your own instead of waiting for Salesforce to do it. Controlling your rollout schedule means you can avoid conflicts with other initiatives at your company and unexpected disruptions to your users.

To roll out MFA:

- 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, Salesforce isn'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](#)

## See Improved Color Contrast in UI Elements

Make your content easier to see and use for people with low vision. Non-text UI elements, such as buttons and checkboxes, and some text UI elements, such as links, now appear with improved color contrast to align with accessibility standards. These color changes affect Salesforce Lightning Design System (SLDS), Lightning base components, and a subset of record home pages.

**Where:** This change applies to Lightning Experience in all editions. The changes to Lightning base components apply in Lightning Experience, but they don't apply if you use a Lightning base component in a custom component.

The color-contrast changes occur for these record home pages only in Lightning Experience.

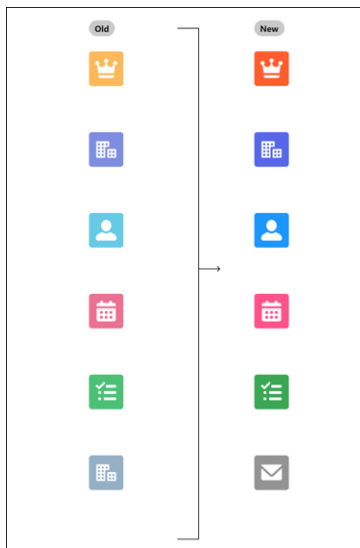
- Case
- Account
- Opportunity
- Contact
- Task
- Lead
- LiveChatTranscript
- EmailMessage
- WorkOrder
- MessagingSession
- Campaign
- VoiceCall
- WorkOrderLineItem
- QuickText
- MessagingEndUser
- KnowledgeArticleVersion
- Macro
- CaseMilestone
- Incident
- ActionPlan
- LiveChatVisitor
- Problem

- ActionPlanTemplate
- CustomObject
- CustomObjectShare

**Why:** Web Content Accessibility Guidelines (WCAG) are a series of web accessibility guidelines published by the [Web Accessibility Initiative \(WAI\)](#) of the [World Wide Web Consortium \(W3C\)](#). The guidelines include criteria for [non-text contrast](#). Good color contrast means that all users can more easily see the content on any device or in any lighting conditions.

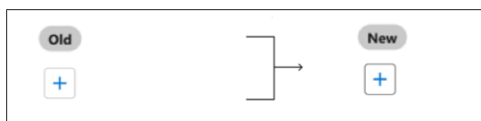
This image shows the difference between standard object and document type icons in Spring '23 (old) and Summer '23 (new). These icon changes occur for all pages in Lightning Experience. The other color-contrast changes occur for a subset of record home pages only.

### Standard Object and Document Type Icons



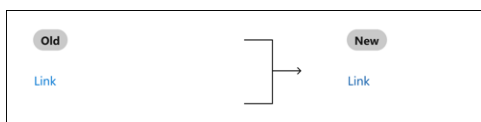
This image shows the difference between neutral borders in Spring '23 (old) and Summer '23 (new). The increased contrast for borders also affects radio buttons, checkboxes, buttons, and input fields.

### Neutral Borders



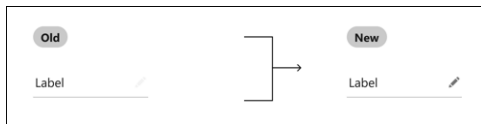
This image shows the difference between links in Spring '23 (old) and Summer '23 (new).

### Links



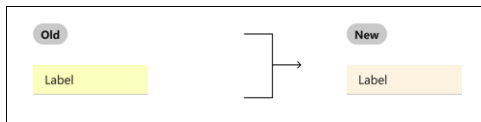
This image shows the difference between edit icons in Spring '23 (old) and Summer '23 (new).

### Edit Icons



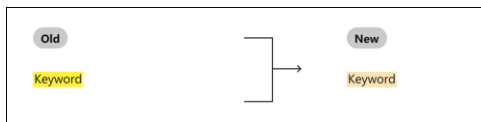
This image shows the difference between the edit state in Spring '23 (old) and Summer '23 (new).

### Edit State



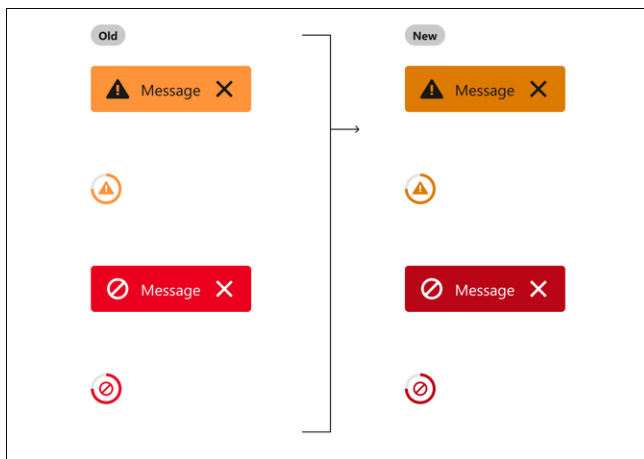
This image shows the difference between search highlights in Spring '23 (old) and Summer '23 (new).

### Search Highlights



This image shows the difference between messaging elements in Spring '23 (old) and Summer '23 (new).

### Messaging Elements



SEE ALSO:

[Salesforce Lightning Design System](#)

[Salesforce Admins Blog: Updates to the Salesforce UI That Will Improve Accessibility for Low-Vision Users](#)

## 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.

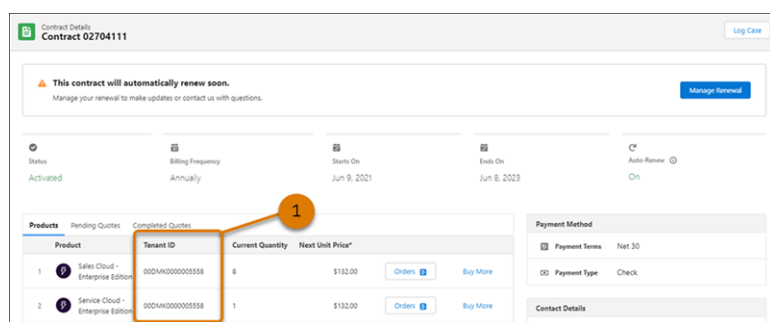
## See Tenant IDs in the Your Account App

Now you can see the ID of your Salesforce org, Tableau deployment, Mulesoft org, Commerce Cloud tenant, and your Marketing Cloud MID (Member ID) in the contracts area of the Your Account app. When you purchase a product, it's assigned and provisioned to a specific tenant. Seeing tenant IDs in your contracts list helps you monitor license usage by tenant.

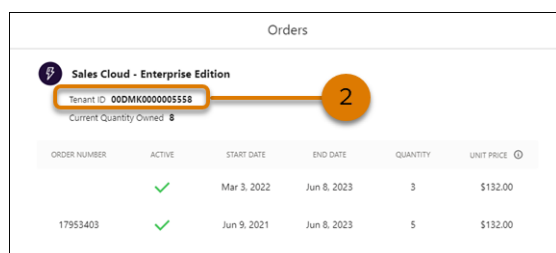
**Where:** This change applies to Lightning Experience and Salesforce Classic in Professional, Enterprise, Performance, and Unlimited editions.

**Who:** To see contracts in the Your Account app, the Manage Billing or the Your Account App Admin User permission set is required.

**How:** Launch the Your Account app and select a contract from your contract list to view the details (1).



The Tenant ID also appears in orders (2).



SEE ALSO:

[Salesforce Help: Manage Your Contracts with the Your Account App](#)

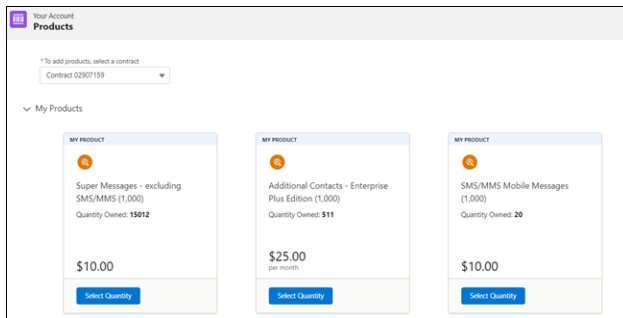
## Manage More Products with the Your Account App

Manage your Marketing Cloud subscriptions from the Your Account app, a self-service solution. For example, you can add more licenses without calling your Salesforce rep.

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

**Who:** To use the Your Account app, the Manage Billing or the Your Account App Admin User permission set is required.

**How:** Launch the Your Account app and then click **Browse & Buy**. On the Products page, under My Products, select the quantity for the Marketing Cloud product you own.



SEE ALSO:

[Salesforce Help: Add Products and Licenses with the Your Account App](#)

## Undo Field Changes with a Click

When you type in an input field on a Lightning Web Components record page, an undo button appears and the background color changes until you save. Clicking the undo button removes your unsaved changes. This functionality doesn't occur in Dynamic Forms—enabled pages. Previously, to use the undo button, you clicked a field, entered content, and then clicked outside the field.

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

## Experience Improved Performance on More Record Home Pages

With Lightning Web Components (LWC)-enabled objects, you can create, view, or edit the record home pages with improved performance, stronger accessibility support, and better service availability. Over 100 more objects now use LWC to render record home pages, bringing the total objects to over 1,000.

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

**Why:** As part of LWC enablement at Salesforce, approximately 80% of all record home pages now render using LWC.

A record home page has this URL pattern.

```
https://MyDomainName.my.salesforce.com/lightning/r/ObjectApiName/RecordId/ViewOrEdit
```

For example, view an account's record home page:

```
https://my-dev-org.my.salesforce.com/lightning/r/Account/0012L000010CuehQAD/view
```

SEE ALSO:

[Salesforce Developers' Blog: Unlocking Aura-to-LWC Migration at Salesforce](#)

[Lightning Web Components Developer Guide: LWC Migration for Record Home Pages at Salesforce](#)(can be outdated or unavailable during release preview)

## Get Better Performance for Related Lists

The related list View All page now renders using Lightning Web Components (LWC) instead of Aura, improving user experience and providing stronger accessibility support. Using LWC, the full list of related records loads earlier and renders faster.

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

**How:** The related list View All page renders using LWC only for objects that are LWC-enabled. The LWC-enabled View All page includes these minor visual changes, but the way that your users work in related lists hasn't changed.

- The object's icon appears in the related list header.
- The Quick Filters panel is renamed to Filters, and the quick filters that users can apply to the list are grouped under a Quick Filters subcategory in the panel.
- When there are no related records in the list, the column headers don't appear on the View All page. On the empty list, users see an illustration and a new message instead of "No items to display."
- On the View All page, users sometimes see checkboxes to select records in the related list when no actions are available. Checkboxes can appear when the related list or dynamic related list includes actions that a user can't access.

SEE ALSO:

[Experience Improved Performance on More Record Home Pages](#)

[Salesforce Developers' Blog: Unlocking Aura-to-LWC Migration at Salesforce](#)

## New Salesforce Feedback Management Developer Guide

Check out the new Salesforce Feedback Management Developer Guide that brings all the Salesforce Feedback Management developer resources to one place.

**Where:** This change applies to both Salesforce Classic ([not available in all orgs](#)) and Lightning Experience in Developer, Enterprise, and Unlimited editions with Surveys enabled.

**Why:** The [Salesforce Feedback Management Developer Guide](#) gives you a unified view of the developer resources for Salesforce Feedback Management, which includes:

- Object model
- Standard objects
- Translation resources
- Business APIs
- Apex classes
- Invocable actions
- Surveys scenarios

## See Object Names in Record Tabs and Subtabs

When viewing or inline editing a record, Salesforce displays record information, object name, and Salesforce in the tab name. It displays record information and the object name in the subtab name. The object name doesn't appear when fully editing a record in Lightning, but it appears when fully editing a record in Lightning Console. Previously, Salesforce displayed only record information and Salesforce in the tab name and record information in the subtab name when viewing or editing a record. This change applies to RRH-enabled objects.

**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.

## Feedback Form in Salesforce Help Menu Is Being Retired

The Give Feedback to Salesforce option in the Salesforce Help menu and the corresponding feedback form are scheduled for retirement when Summer '23 is released. To continue submitting feedback about your experience in Salesforce, contact your account executive. Or, for help with a specific issue, submit a Salesforce Customer Support case.

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

## News, Automated Account Fields, and Account Logos Are Being Retired

The News, automated account fields, and automated account logo features are being retired in all Salesforce orgs in Winter '24 on October 13, 2023. After these account features are retired, Salesforce doesn't prompt users with suggestions for account names and doesn't fill out fields or add company logos automatically. The News component is removed from page layouts.

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

SEE ALSO:

[Salesforce Help: News](#)

[Salesforce Help: Enable Account Logos](#)

[Salesforce Help: Enable Automated Account Fields](#)

## Send Survey Invitations to Unauthenticated Participants

Send survey invitations to unauthenticated participants by using the Salesforce Feedback Management (SFM) unAuth Response APIs.

**Where:** This change applies to both Salesforce Classic ([not available in all orgs](#)) and Lightning Experience in Developer, Enterprise, and Unlimited editions with Surveys and Unauthenticated Survey Participation enabled.

SEE ALSO:

[Surveys for Unauthenticated Participants](#)

## Set a Password or Expiration on a Public Link to a Salesforce File

In Lightning Experience, when you create a public link to share a file, you can choose to set a date when the link expires. You can also protect access to the file with a password. By default, link expiration is enabled and set for 90 days, and password protection is off by default. When password protection is toggled on, an auto-generated password shows in the dialog.

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



Public Link Sharing

Anyone with this link can view and download the file.

Expiration date ☒ Enabled 06/01/2023

Password ☐ Disabled

<http://bbuilder/2983/m.salesforce.com/2938292/29kdn2928> Copy Link

Public links to folders don't have password protection or link expiration.

SEE ALSO:

[Salesforce Help: Share Files Via Link \(can be outdated or unavailable during release preview\)](#)

## Salesforce Scheduler

Manage the customers who visit your business locations for drop-in appointments.

IN THIS SECTION:

[Lobby Management for Drop-In Customers](#)

Use Salesforce Scheduler to manage your customer appointments. In addition to managing scheduled appointments, your users can now efficiently manage the customers who visit your business locations without prior appointments. Get actionable insights from the information that a greeter captures when the customer arrives.

[New and Changed Metadata Types](#)

Make the most of the new and changed Salesforce Scheduler metadata types.

[Salesforce Scheduler Videos](#)

New videos help you learn about the capabilities of Salesforce Scheduler.

## Lobby Management for Drop-In Customers

Use Salesforce Scheduler to manage your customer appointments. In addition to managing scheduled appointments, your users can now efficiently manage the customers who visit your business locations without prior appointments. Get actionable insights from the information that a greeter captures when the customer arrives.

IN THIS SECTION:

[Manage Drop-In Customers](#)

With Drop In Appointments, territory managers can create and manage virtual customer queues (waitlists), and front desk reps (greeters) can capture customer details and add customers to waitlists. And service resources can get notified about drop-in appointments and accept them. Admins can also enable Skill Matching for drop-in appointments to assign service resources having the desired skills.

### [Use Waitlists to Connect Customers with the Relevant Resources](#)

Let territory managers create waitlists for their branch based on work type and applicable service resources to each waitlist. The territory manager or a greeter can then enable a waitlist based on service resource availability and assign appointments.

### [Reduce Customer Wait Time with Waitlists](#)

Greeters (front desk reps) can capture the details of customers and check them in. Greeters assign each customer to a waitlist based on their reason for the visit, and then Salesforce Scheduler notifies the appropriate service resources.

### [Get Notifications for Drop-In Appointments to Enhance Efficiency](#)

Use service resources efficiently by enabling drop-in appointments notifications. A service resource can then view drop-in appointment requests on their calendar console and accept drop-in requests between scheduled appointments and during free time.

SEE ALSO:

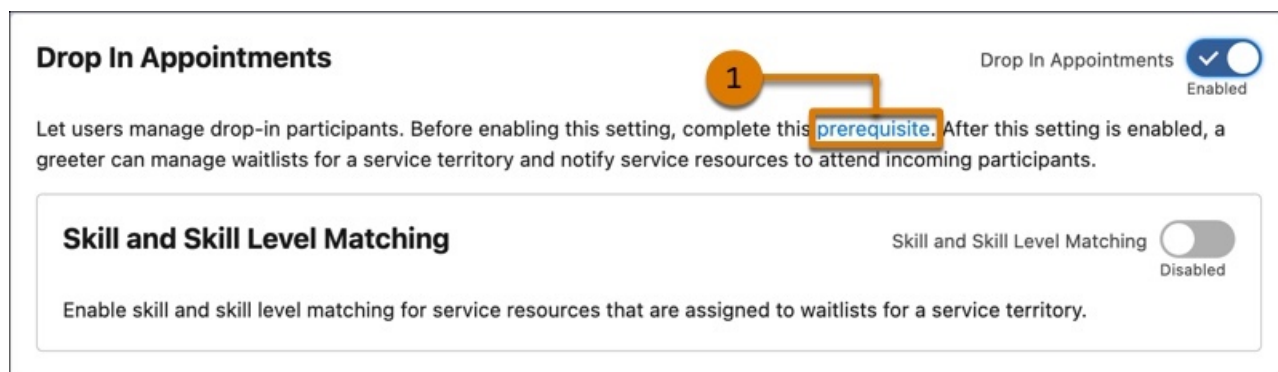
[Salesforce Scheduler Help: Lobby Management for Drop In Appointments \(can be outdated or unavailable during release preview\)](#)

## Manage Drop-In Customers

With Drop In Appointments, territory managers can create and manage virtual customer queues (waitlists), and front desk reps (greeters) can capture customer details and add customers to waitlists. And service resources can get notified about drop-in appointments and accept them. Admins can also enable Skill Matching for drop-in appointments to assign service resources having the desired skills.

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

**How:** On the Salesforce Scheduler Settings page, in the Drop In Appointments section, complete the prerequisites (1), and then turn on Drop In Appointments.



SEE ALSO:

[Salesforce Scheduler Help: Enable Drop In Appointments \(can be outdated or unavailable during release preview\)](#)

## Use Waitlists to Connect Customers with the Relevant Resources

Let territory managers create waitlists for their branch based on work type and applicable service resources to each waitlist. The territory manager or a greeter can then enable a waitlist based on service resource availability and assign appointments.

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

**How:** To create a waitlist, click **New** on the Waitlists tab.

SEE ALSO:

[Salesforce Scheduler Help: Create Waitlists for a Service Territory \(can be outdated or unavailable during release preview\)](#)

## Reduce Customer Wait Time with Waitlists

Greeters (front desk reps) can capture the details of customers and check them in. Greeters assign each customer to a waitlist based on their reason for the visit, and then Salesforce Scheduler notifies the appropriate service resources.

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

**How:** On the Waitlist Management tab, click **Check In** for a waitlist and enter the details.

Check in - Loan Management

**\* Account Status**

☐ Existing Participant

☒ New Participant

**\* First Name**

Enter participant's first name

**\* Last Name**

Enter participant's last name

**\* Contact Number**

Enter participant's contact number

**Company**

Enter participant's company.

**\* Email**

Enter participant's email address...

**\* Work Type Group**

Select...

**Description**

Enter a description for participant's visit...

Check in

SEE ALSO:

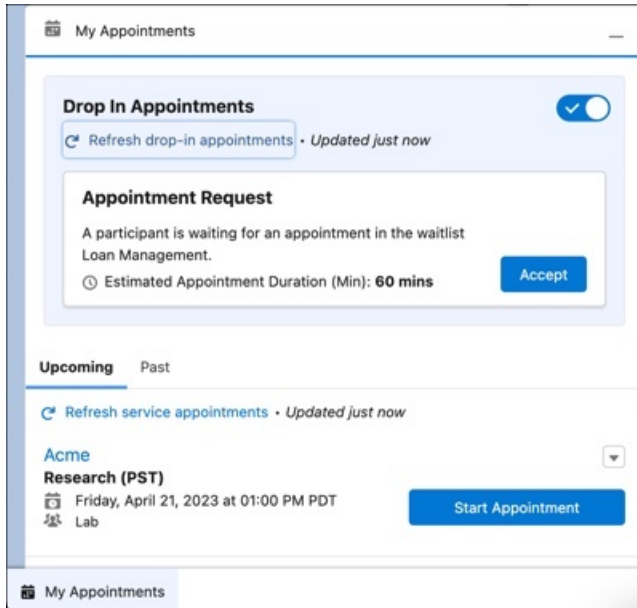
[Salesforce Scheduler Help: Check In Drop-In Participants \(can be outdated or unavailable during release preview\)](#)

## Get Notifications for Drop-In Appointments to Enhance Efficiency

Use service resources efficiently by enabling drop-in appointments notifications. A service resource can then view drop-in appointment requests on their calendar console and accept drop-in requests between scheduled appointments and during free time.

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

**How:** On the My Appointments micro calendar console, turn on Drop In Appointments. Service resources can view and accept appointment requests on the micro calendar console.



SEE ALSO:

[Salesforce Scheduler Help: Attend Drop-In Participants Using My Appointments Console](#) (can be outdated or unavailable during release preview)

## New and Changed Metadata Types

Make the most of the new and changed Salesforce Scheduler metadata types.

### Settings

#### Manage drop-in participants

Use the new `enableDropInAppointmentsOrgPref` field on the `IndustriesSettings` metadata type.

#### Enable skill and skill level matching for service resources

Use the new `enableDropInSkillMatchingOrgPref` field on the `IndustriesSettings` metadata type.

#### Schedule appointments for service resources based on appointment distribution

Use the `appointmentDistributionOrgPref` field on the `IndustriesSettings` metadata type. Introduced in API version 52.0, this type is added to the Salesforce Scheduler Developer Guide.

#### Use a background process to calculate the usage of service resources from service appointments

Use the `captureResourceUtilizationOrgPref` field on the `IndustriesSettings` metadata type. Introduced in API version 52.0, this type is added to the Salesforce Scheduler Developer Guide.

#### Add Salesforce Scheduler service appointments to users' Salesforce calendars

Use the `enableBlockResourceAvailabilityOrgPref` field on the `IndustriesSettings` metadata type. Introduced in API version 47.0, this type is added to the Salesforce Scheduler Developer Guide.

#### Enable users to group individual events, and view the list of all attendees under a single event

Use the `enableCreateMultiAttendeeEventOrgPref` field on the `IndustriesSettings` metadata type. Introduced in API version 55.0, this type is added to the Salesforce Scheduler Developer Guide.



**Enable users to add Salesforce Scheduler service appointments to their Salesforce calendars**

Use the `enableEventManagerOrgPref` field on the `IndustriesSettings` metadata type. Introduced in API version 47.0, this type is added to the Salesforce Scheduler Developer Guide.

**Use engagement channels for setting up shifts, work types, and booking a service appointment**

Use the `enableAppFrmAnywhereOrgPref` field on the `IndustriesSettings` metadata type. Introduced in API version 56.0, this type is added to the Salesforce Scheduler Developer Guide.

**Enable Salesforce Scheduler to consider service resource records with Agent resource type**

Use the `enableAnyResourceTypeOrgPref` field on the `IndustriesSettings` metadata type. Introduced in API version 57.0, this type is added to the Salesforce Scheduler Developer Guide.

**Publish high-volume platform events when users create, update, or delete service appointments in Salesforce Scheduler**

Use the `enableEventWriteOrgPref` field on the `IndustriesSettings` metadata type. Introduced in API version 49.0, this type is added to the Salesforce Scheduler Developer Guide.

**Enable users to add multiple service resources to a service appointment**

Use the `enableMultiResourceOrgPref` field on the `IndustriesSettings` metadata type. Introduced in API version 47.0, this type is added to the Salesforce Scheduler Developer Guide.

**Enable users to add multiple service appointments to a single time slot for a service resource**

Use the `enableOverbookingOrgPref` field on the `IndustriesSettings` metadata type. Introduced in API version 47.0, this type is added to the Salesforce Scheduler Developer Guide.

**Share service appointments with assigned resources**

Use the `enableShareSaWithArOrgPref` field on the `IndustriesSettings` metadata type. Introduced in API version 55.0, this type is added to the Salesforce Scheduler Developer Guide.

**Use Salesforce Scheduler to manage Health Cloud appointments**

Use the `enableTopicOrTemplate` field on the `IndustriesSettings` metadata type. Introduced in API version 52.0, this type is added to the Salesforce Scheduler Developer Guide.

**Set operating hours for Service Territory Members for Work Type Groups**

Use the `enableTopicTimeSlot` field on the `IndustriesSettings` metadata type. Introduced in API version 52.0, this type is added to the Salesforce Scheduler Developer Guide.

**SEE ALSO:**

[Salesforce Scheduler Developer Guide: Industries Settings](#)

## Salesforce Scheduler Videos

New videos help you learn about the capabilities of Salesforce Scheduler.

-  [Enable Guest Users to Book Appointments by Using Flows in Salesforce Scheduler](#) shows how you can enable prospects to book appointments from Experience Cloud sites and your company websites.

## Einstein Search

Improve how you receive your search results. With Search Manager, configure searchable standard and custom objects, even picklists, to see information related to your work. You can also receive specific answers from a knowledge article with Einstein Search Answers.

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

## IN THIS SECTION:

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

Help your team get results related to their work by configuring all your searchable standard and custom objects for each user profile. In Search Manager, you can now choose which objects to make searchable or not searchable for each user.

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

Skip the additional workflows. You can now select a picklist field to be searchable in Search Manager. Picklists offer 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.

[Resolve Cases Faster with Einstein Search Answers \(Pilot\)](#)

Get extracted relevant text from a knowledge article to speed up case resolution. Interact with the answers, and copy the link or answer to your clipboard. Plus, you can easily view the answer source.

## SEE ALSO:

[Einstein Release Notes](#)

## Configure Searchable Objects for Each User Profile (Beta)

Help your team get results related to their work by configuring all your searchable standard and custom objects for each user profile. In Search Manager, you can now choose which objects to make searchable or not searchable for each user.

**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 Users' Searchable 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. Picklists offer 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 Users' Searchable Fields \(Beta\) \(can be outdated or unavailable during release preview\)](#)

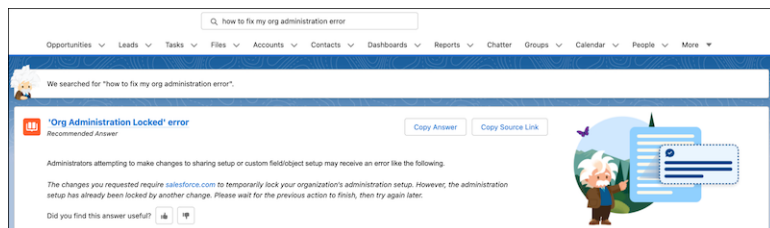
## Resolve Cases Faster with Einstein Search Answers (Pilot)

Get extracted relevant text from a knowledge article to speed up case resolution. Interact with the answers, and copy the link or answer to your clipboard. Plus, you can easily view the answer source.

**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:** Ask your Salesforce admin to turn on **Einstein Search Answers from Knowledge Object**. This feature activates 24 hours after it's turned on. If you have feedback or issues, email [tryeinsteinsearch@salesforce.com](mailto:tryeinsteinsearch@salesforce.com).



SEE ALSO:

[Salesforce Help: How Does Einstein Search Use My Data \(can be outdated or unavailable during release preview\)](#)

## Analytics

Analytics enhancements include new and updated features for Lightning reports and dashboards, CRM Analytics, analytics apps, Einstein Discovery, and Tableau.

### IN THIS SECTION:

#### [Unified Analytics Experiences](#)

With unified experiences in the Analytics tab and Slack, you can interact with all of your Lightning reports and dashboards, CRM Analytics assets, and Einstein Discovery models and predictions. The Analytics tab is your home for Lightning reports and dashboards and CRM Analytics assets, with advanced search, recommendations, collections of all your analytics, and more. With the Post to Slack option on Lightning dashboards and the CRM Analytics for Slack app, you can easily share analytics with colleagues across your Slack workspaces and channels.

#### [Lightning Reports and Dashboards](#)

For a unified and cohesive experience, make the Analytics tab your home for all Analytics assets, including Lightning reports and dashboards. For Unlimited Edition users, enhance your Lightning dashboards with images and rich text and up to five dashboard filters.

#### [CRM Analytics](#)

Analyze and act on more data, more efficiently with enhancements to lenses, widgets, and dashboards. Build streamlined and flexible dashboards with responsive components, flow interactions, Direct Data for Data Cloud, and more.

#### [Analytics Apps](#)

Analytics app enhancements include new and updated features for intelligent apps as well as industry and prebuilt CRM Analytics apps.

#### [Einstein Discovery](#)

Turn on Decision Optimization (beta) to improve Einstein's recommendations. Migrate your Einstein Discovery models, including the configuration of the model, with packages.

### [Tableau](#)

Use Tableau to analyze, explore, and make decisions on your data with just a few clicks. Create engaging visualizations and embed them in your Lightning pages to use them in your workflows. Tableau has enterprise analytics platform solutions for deep data exploration.

### [Marketing Cloud Intelligence](#)

With Marketing Cloud Intelligence you connect, harmonize, visualize, and act on your marketing data to optimize performance within campaigns, discover insights in real-time, and then act on them.

## Unified Analytics Experiences

With unified experiences in the Analytics tab and Slack, you can interact with all of your Lightning reports and dashboards, CRM Analytics assets, and Einstein Discovery models and predictions. The Analytics tab is your home for Lightning reports and dashboards and CRM Analytics assets, with advanced search, recommendations, collections of all your analytics, and more. With the Post to Slack option on Lightning dashboards and the CRM Analytics for Slack app, you can easily share analytics with colleagues across your Slack workspaces and channels.

### IN THIS SECTION:

#### [Unify All Your Analytics in the Analytics Home \(Generally Available\)](#)

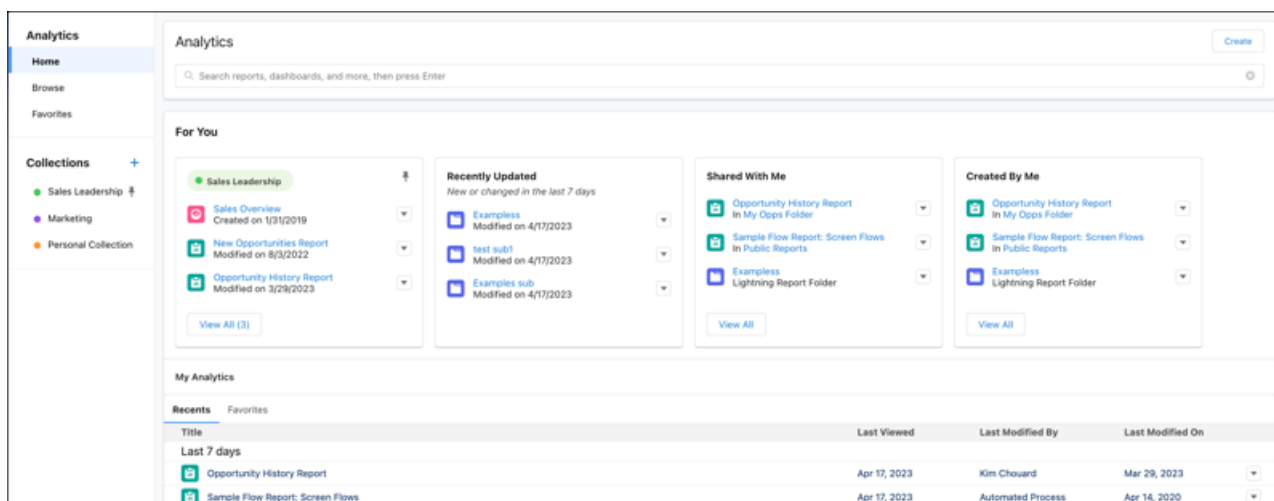
Rather than managing analytics scattered across different tools, find what you need in the updated Analytics home. This personalized environment for CRM Analytics and reports and dashboards, organizes all your content in a cohesive and intelligent experience. Go to See Also to learn more about the reimagined Analytics home for CRM Analytics and reports and dashboards.

#### [Post Lightning Dashboards with CRM Analytics for Slack](#)

Share analytics with colleagues across your Slack workspaces and channels. Recipients can view dashboard details, share, subscribe, view a real-time snapshot of the dashboard, and quickly open the dashboard in Salesforce.

## Unify All Your Analytics in the Analytics Home (Generally Available)

Rather than managing analytics scattered across different tools, find what you need in the updated Analytics home. This personalized environment for CRM Analytics and reports and dashboards, organizes all your content in a cohesive and intelligent experience. Go to See Also to learn more about the reimagined Analytics home for CRM Analytics and reports and dashboards.



SEE ALSO:

[Bring Together All Your Analytics in Analytics Home \(Generally Available\)](#)

[Manage Your Reports and Dashboards on the Analytics Tab \(Generally Available\)](#)

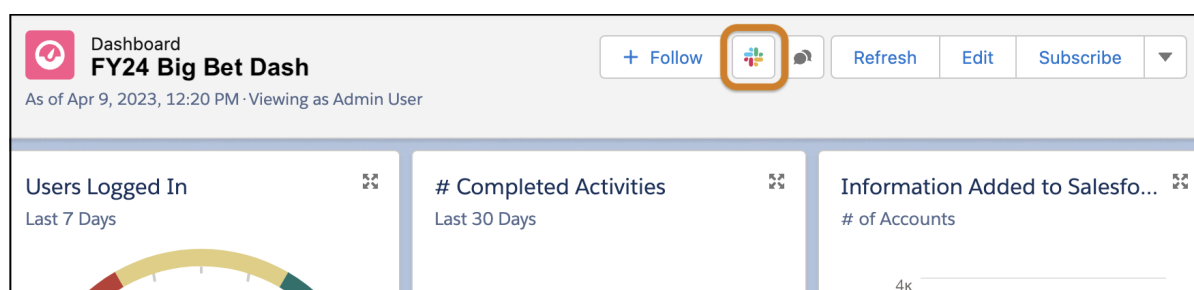
## Post Lightning Dashboards with CRM Analytics for Slack

Share analytics with colleagues across your Slack workspaces and channels. Recipients can view dashboard details, share, subscribe, view a real-time snapshot of the dashboard, and quickly open the dashboard in Salesforce.

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

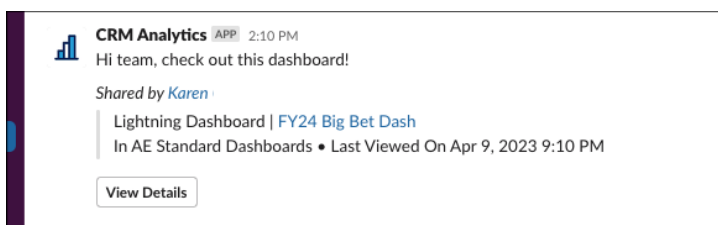
**Who:** Users must have the Connect Salesforce with Slack permission in Salesforce, and they must connect their CRM Analytics for Slack app in their Slack workspace to their Salesforce account.

**How:** In a Lightning dashboard, click the Post to Slack icon.



Select the Slack workspace and channels where you want to share the dashboard.

The post appears in the channels that you selected. Click the dashboard name to go to the dashboard in Salesforce. Click **View Details** to see more and access the Share, Subscribe, and View Snapshot actions.



#### SEE ALSO:

[Salesforce Help: Add Apps in Your Personal Slack Sidebar](#)

[Salesforce Help: CRM Analytics for Slack](#)

## Lightning Reports and Dashboards

For a unified and cohesive experience, make the Analytics tab your home for all Analytics assets, including Lightning reports and dashboards. For Unlimited Edition users, enhance your Lightning dashboards with images and rich text and up to five dashboard filters.

#### IN THIS SECTION:

[Enhance Your Visualizations with Images, Rich Text, and Dashboard Widgets](#)

Explain Lightning dashboard charts, describe metrics and KPIs, and clarify tables with rich text right where users need it. Add company logos and branding, flow diagrams, and embedded images. Guide users through their data with section titles, narrative text, and even animated GIFs. Components are now called widgets in Unlimited and Performance editions. Dashboards now support up to 25 widgets, including a maximum of 20 charts and tables, 2 images, and 25 rich text widgets. The previous limit was 20 in total.

[Focus Your View with More Dashboard Filters](#)

Save time and effort and reduce dashboard redundancy. No more cloning dashboards for different teams and business units. Refine and target your dashboard data with up to five filters on Lightning dashboards. The previous limit was three filters.

[Post Lightning Dashboards in Slack](#)

With the Post to Slack option on dashboards, you can share analytics with colleagues across your Slack workspaces and channels. Recipients can view dashboard details, share, subscribe, view a real-time snapshot of the dashboard, and quickly open the dashboard in Salesforce.

### [Manage Your Reports and Dashboards on the Analytics Tab \(Generally Available\)](#)

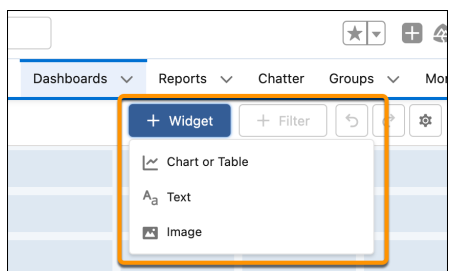
Get a cohesive and personalized experience for all your analytics with the new Analytics tab. Within your new home for analytics, you get a centralized environment that can be tailored to your data needs. In addition, you get an intuitive search functionality that makes it easy to find the data you need. You also get Collections that enable you to curate and categorize your most important data and insights, and collaborate with your colleagues more efficiently.

## Enhance Your Visualizations with Images, Rich Text, and Dashboard Widgets

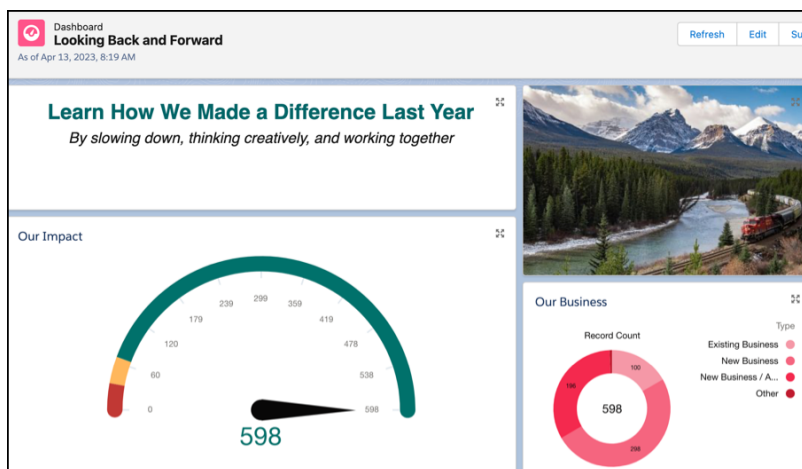
Explain Lightning dashboard charts, describe metrics and KPIs, and clarify tables with rich text right where users need it. Add company logos and branding, flow diagrams, and embedded images. Guide users through their data with section titles, narrative text, and even animated GIFs. Components are now called widgets in Unlimited and Performance editions. Dashboards now support up to 25 widgets, including a maximum of 20 charts and tables, 2 images, and 25 rich text widgets. The previous limit was 20 in total.

**Where:** This change applies to Lightning Experience in Unlimited and Performance editions.

**How:** When editing a dashboard, click **+Widget** and select the type of widget to add.



Combine charts, text, and images to inform, engage, and guide viewers.



SEE ALSO:

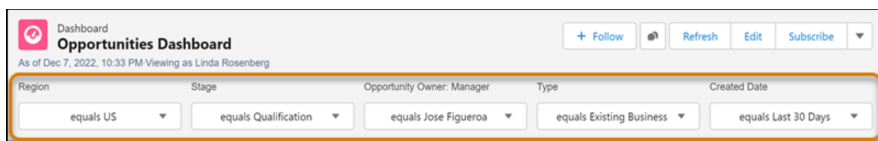
[Edit and Customize Lightning Experience Dashboard Components](#)

## Focus Your View with More Dashboard Filters

Save time and effort and reduce dashboard redundancy. No more cloning dashboards for different teams and business units. Refine and target your dashboard data with up to five filters on Lightning dashboards. The previous limit was three filters.

**Where:** This change applies to Lightning Experience in Unlimited and Performance editions.

**How:** Reuse the same dashboard for all your regional teams while preserving existing filters that are already set up for each team. Previously, if you filtered on Stage, Opportunity Owner, and Type, you couldn't add a Region filter that would allow you to reuse the dashboard for all your teams. Now you can include the Region filter and even have room for a Created Date filter as well.



## Post Lightning Dashboards in Slack

With the Post to Slack option on dashboards, you can share analytics with colleagues across your Slack workspaces and channels. Recipients can view dashboard details, share, subscribe, view a real-time snapshot of the dashboard, and quickly open the dashboard in Salesforce.

**Where:** This change applies to Lightning Experience in Group, Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions. The CRM Analytics for Slack app 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 they must connect their CRM Analytics for Slack app in their Slack workspace to their Salesforce account.

SEE ALSO:

[Post Lightning Dashboards with CRM Analytics for Slack](#)

[Salesforce Help: Add Apps in Your Personal Slack Sidebar](#)

[Salesforce Help: CRM Analytics for Slack](#)

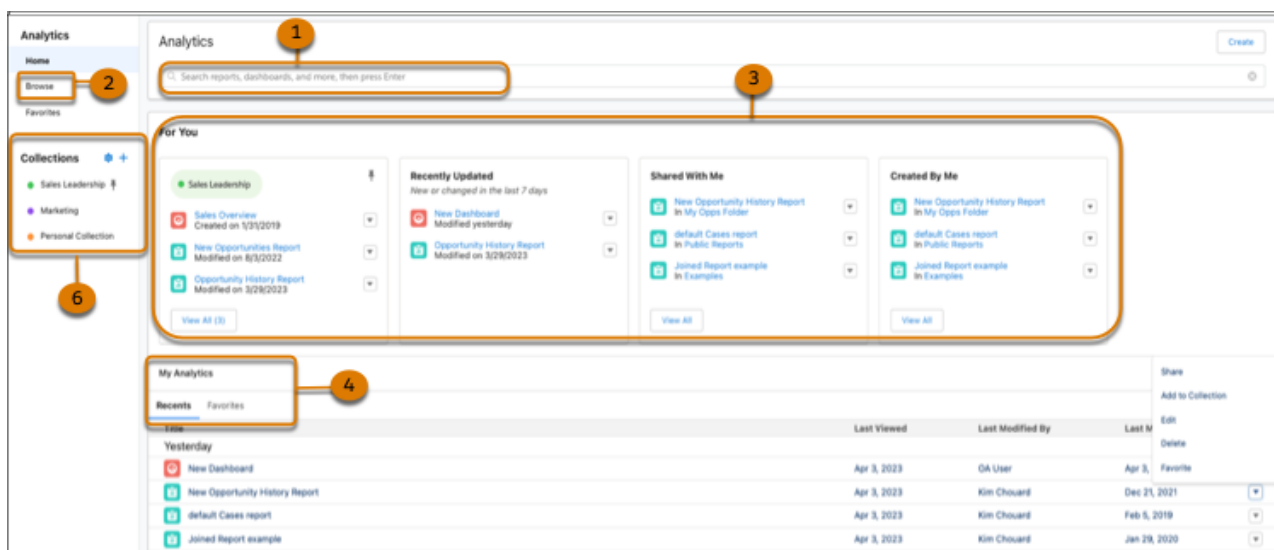
## Manage Your Reports and Dashboards on the Analytics Tab (Generally Available)

Get a cohesive and personalized experience for all your analytics with the new Analytics tab. Within your new home for analytics, you get a centralized environment that can be tailored to your data needs. In addition, you get an intuitive search functionality that makes it easy to find the data you need. You also get Collections that enable you to curate and categorize your most important data and insights, and collaborate with your colleagues more efficiently.

**Where:** This change applies to Lightning Experience in Group, Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions. Access to CRM Analytics items is available for an extra cost.

**How:** From the App Launcher, select **Analytics**. On the Analytics tab, use search (1) and browse (2) to locate reports and dashboards. For You (3) organizes analytics for each user to help them find what they're looking for quickly. Go to My Analytics (4) to access content from a chronological listing or from Favorites. Use Collections (6) to curate and organize analytics across different folders and share them with other users.





SEE ALSO:

[Salesforce Help: Manage Your Reports and Dashboards in Analytics Home](#) (can be outdated or unavailable during release preview)

## CRM Analytics

Analyze and act on more data, more efficiently with enhancements to lenses, widgets, and dashboards. Build streamlined and flexible dashboards with responsive components, flow interactions, Direct Data for Data Cloud, and more.

### IN THIS SECTION:

[Bring Together All Your Analytics in Analytics Home \(Generally Available\)](#)

With the new Analytics home, you get a personalized environment that unifies your CRM Analytics items, and reports and dashboards. You can now organize all your analytics in a cohesive and intelligent experience without having to manage multiple apps. For example, Lightning and CRM Analytics dashboards can now exist together in the same collection to help you efficiently organize and categorize your work. You get access to all your analytics in one place, making it easier to stay on top of your data.

[CRM Analytics Visualization and Dashboard Building](#)

Streamline your dashboard experience with responsive components, easily changed column names, and single-click action enhancements. Get data to your users faster with performance improvements and Dashboard Inspector 2.0.

[Analytics Data Integration](#)

Use staged data as an alternative to datasets to reduce processing time when your data strategy involves multiple recipes. Update to the new Google Analytics 4 connector to sync Google Analytics data.

[Analytics Development](#)

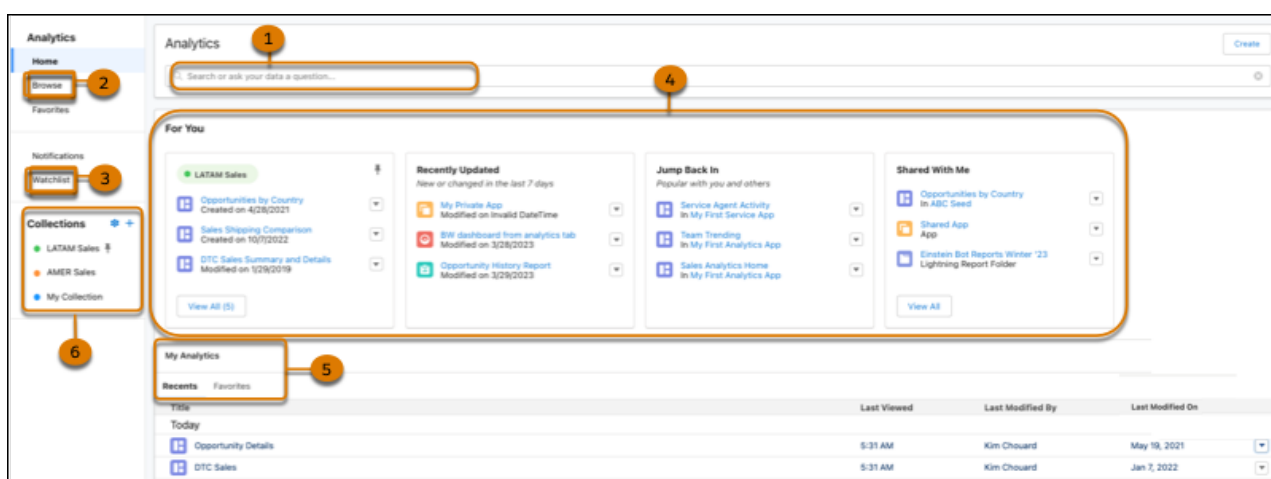
The Analytics Interactions guide is improved, and the mobile beta testing sign-up has a new location. Find updates to the Analytics Connect REST APIs, the `wave: sdk` Aura component, and more.

## Bring Together All Your Analytics in Analytics Home (Generally Available)

With the new Analytics home, you get a personalized environment that unifies your CRM Analytics items, and reports and dashboards. You can now organize all your analytics in a cohesive and intelligent experience without having to manage multiple apps. For example, Lightning and CRM Analytics dashboards can now exist together in the same collection to help you efficiently organize and categorize your work. You get access to all your analytics in one place, making it easier to stay on top of your data.

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

**How:** From the App Launcher, select **Analytics**. On the Analytics tab, use search (1) and browse (2) to locate your analytics. Use the Watchlist (3) to track dashboard KPIs and trending. The For You section (4), helps you find what you're looking for quickly, and automatically updates with the latest asset changes and makes smart recommendations for discovering new items. Go to My Analytics (5) to access content from a chronological listing or from Favorites. Use Collections (6) to curate and organize analytics across different apps and folders, and you can pin collections to users home pages so they all benefit from the same insights.



SEE ALSO:

[Salesforce Help: Unify and Manage Your Analytics \(can be outdated or unavailable during release preview\)](#)

## CRM Analytics Visualization and Dashboard Building

Streamline your dashboard experience with responsive components, easily changed column names, and single-click action enhancements. Get data to your users faster with performance improvements and Dashboard Inspector 2.0.

IN THIS SECTION:

### [Make Component Widgets Dynamic with Parameters](#)

Use parameters to make a component's widgets and query properties respond to user input or query interactions. With parameters, you can customize a component's content, such as a chart or metric, without recreating it for each use case. Previously, component widgets couldn't be changed and you had to recreate them each time you wanted them to contain something different. For example, when you add the same component to multiple dashboards it can now change dynamically and integrate with the content of the dashboard.

### [Rename Columns in Lenses with Ease](#)

Rename measure and dimension columns in a lens with a few clicks. The new name displays in tables, charts, and filters that use the column. The name change also persists when you save the lens or clip it to a dashboard, but it doesn't appear in the data source or other queries using the same data source. Previously, to rename columns, you edited the query in SQL, SOQL, or JSON mode.

### [View Table Totals and Subtotals in Direct Data](#)

To quickly summarize large amounts of data from Snowflake or Data Cloud, add totals to crucial data columns, such as sales amounts, in a lens or dashboard table. For a comparative analysis on data segments, such as sales by region, group the data in the table and add subtotals. The summary options available depend on the table type. You can include column totals in values tables and totals and subtotals in compare tables. In pivot tables, you can include row and column totals as well as subtotals.

### [Use Enhanced Single-Click Interactions in Dashboard Widgets](#)

Creating a curated journey for dashboard users with single-click navigation interactions has more options. When you build a navigation flow, you can now add an action to return the user to the initial dashboard view. You can also add single-click interactions to image, number, and container widgets.

### [Start a Dynamic Flow Directly from a Dashboard Widget \(Beta\)](#)

Launch flows from your Analytics dashboard using flow interactions. For example, on a dashboard tracking cases, design a text widget that launches your custom case assignment flow with a single click. The flow interaction passes dynamic user ID values to the flow, so users don't have to leave your dashboard to do their work. Flow interactions are available only for the text widget.

### [Explore Multiple Data Model Objects in Direct Data Using Joins \(Beta\)](#)

It's now easier to analyze data model object (DMO) records where the data is normalized and related information resides in separate DMOs. To explore and draw insights from multiple DMOs simultaneously, join these objects in a single dashboard query. Direct Data for Data Cloud now supports four types of joins on data model objects with defined relationships between them. You can also filter the joined data and highlight the records that matter with conditional formatting. Previously, you wrote custom SQL queries to analyze data in multiple DMOs.

### [Ensure Better Data Accuracy with Fully Qualified Keys](#)

Avoid errors when you analyze Direct Data for Data Cloud records by including fully qualified keys (FQK) in your queries. CRM Analytics now recognizes the Data Cloud Identifier field as a dimension, so unique Data Cloud records aren't accidentally considered duplicates. For example, in a join query that analyzes sales orders from multiple data sources, add the FQKs from the sources to ensure that you don't misinterpret your sales data.

### [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.

### [Troubleshoot Dashboard Performance Quickly with Dashboard Inspector 2.0](#)

The updated Dashboard Inspector 2.0 makes performance metrics more accessible, informative, and intuitive. Quickly get actionable insights, such as dashboard recommendations, with performance checks immediately initiated when you open the Dashboard inspector. Relevant information now includes slow queries and network delays and is rendered on a single, comprehensive tab.

### [Get Improved Dashboard Performance with Better Caching](#)

Your dashboards are now more responsive and faster loading with improved caching. Caching now updates only the dashboard elements that have changed instead of a full refresh with every user interaction.

### [Experience Faster Dashboard Exploration](#)

Explore dashboards more quickly without waiting on every interaction. You're no longer blocked from interacting with your dashboard after making a selection like applying a filter. Instead, only the widgets that are updating are paused.

### [Get Improved Performance on Data Cloud Queries](#)

Accelerated Queries for CRM Analytics runs queries on Data Cloud records faster. This feature, which is native to Data Cloud, speeds up interactivity as you explore and visualize Data Cloud objects in a CRM Analytics dashboard.

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

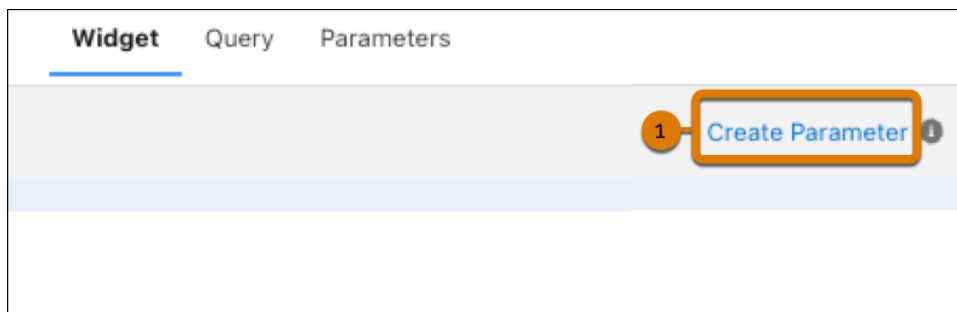
Gain insights on Tableau Cloud and Tableau Server data from the comfort of CRM Analytics Home. Easily publish Tableau Cloud and Tableau Server dashboards, sheets, and stories to a CRM Analytics app or Lightning page without first embedding Tableau views or installing additional software. Combine Tableau 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.

## Make Component Widgets Dynamic with Parameters

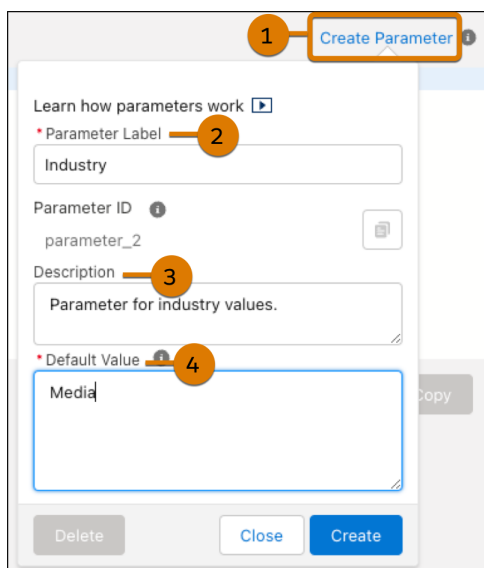
Use parameters to make a component's widgets and query properties respond to user input or query interactions. With parameters, you can customize a component's content, such as a chart or metric, without recreating it for each use case. Previously, component widgets couldn't be changed and you had to recreate them each time you wanted them to contain something different. For example, when you add the same component to multiple dashboards it can now change dynamically and integrate with the content of the dashboard.

**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.

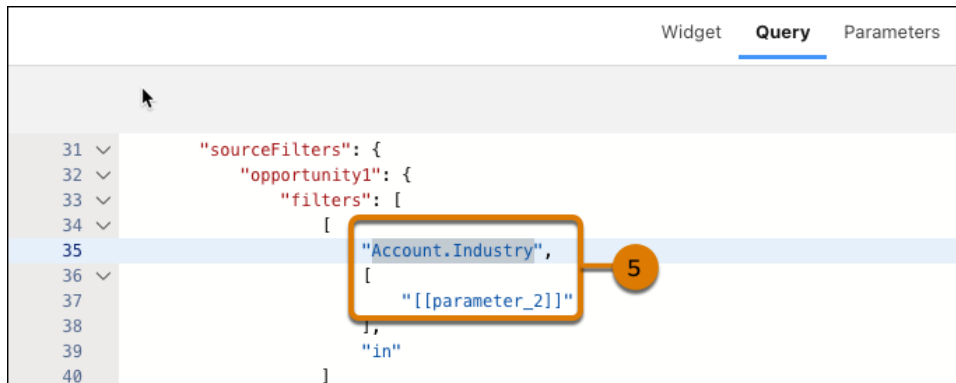
**How:** For example, if you want to enable interactions between a component and a dashboard filter, edit a component or create one. In the Advanced Editor, click **Create Parameter** (1).



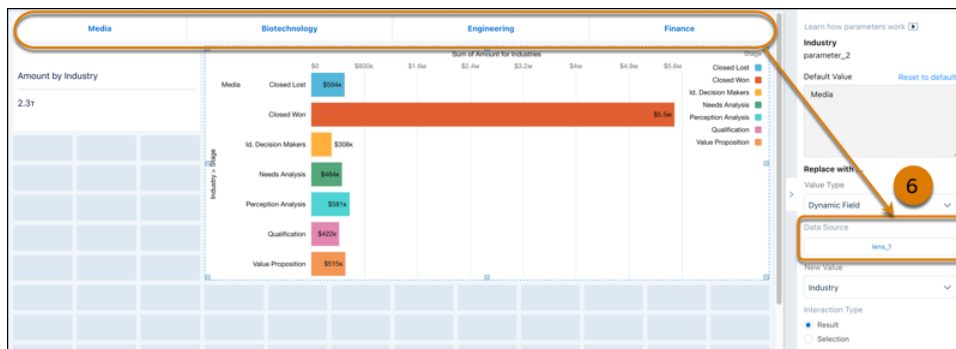
Add a parameter label (2), optional description (3), and a default value (4).



Insert the parameter in the component's filter settings (5).



Next, set up the parameter to interact with the dashboard filter (6).



SEE ALSO:

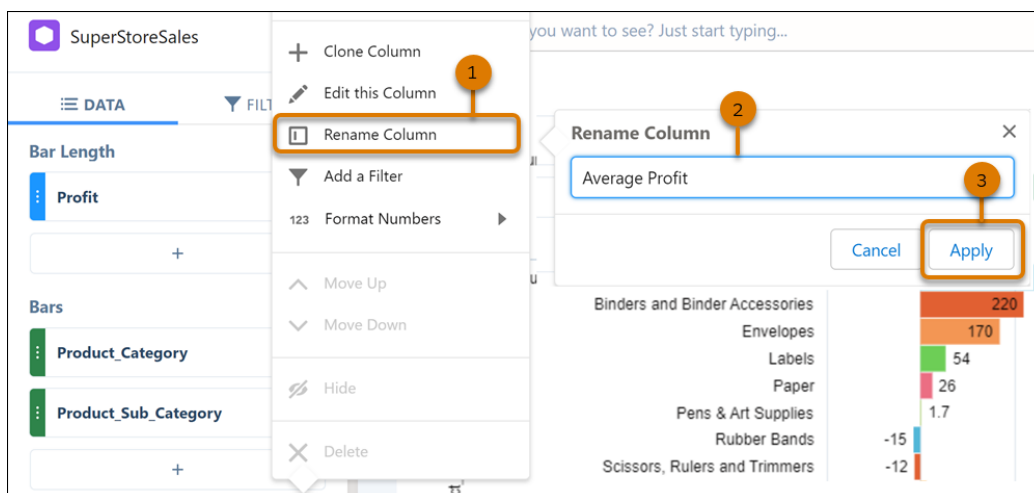
[Salesforce Help: Create and Reuse Dashboard Components \(can be outdated or unavailable during release preview\)](#)

## Rename Columns in Lenses with Ease

Rename measure and dimension columns in a lens with a few clicks. The new name displays in tables, charts, and filters that use the column. The name change also persists when you save the lens or clip it to a dashboard, but it doesn't appear in the data source or other queries using the same data source. Previously, to rename columns, you edited the query in SQL, SOQL, or JSON mode.

**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 lens mode, click **Rename Column** from a column's context menu (1). Enter the new name (2) and apply your changes (3).



## View Table Totals and Subtotals in Direct Data

To quickly summarize large amounts of data from Snowflake or Data Cloud, add totals to crucial data columns, such as sales amounts, in a lens or dashboard table. For a comparative analysis on data segments, such as sales by region, group the data in the table and add subtotals. The summary options available depend on the table type. You can include column totals in values tables and totals and subtotals in compare tables. In pivot tables, you can include row and column totals as well as subtotals.

**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 table mode, click  and select a summary option.

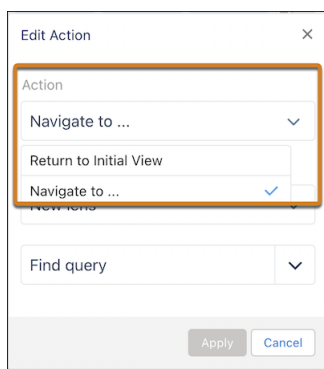
Model ID →	Total	03V5700000001G0MAI
Campaign ID ↑	Revenue Share	Revenue Share
Total	3,712,272	3,712,272
701S70000005BL6IAM	1,264,716	1,264,716
701S70000005BL7IAM	371,841	371,841
701S70000005BL8IAM	195,957	195,957
701S70000005BL9IAM	496,540	496,540
701S70000005BLAIA2	218,634	218,634
701S70000005BLBIA2	315,633	315,633
701S70000005BLCIA2	348,951	348,951
701S70000005BLDIA2	500,000	500,000

## Use Enhanced Single-Click Interactions in Dashboard Widgets

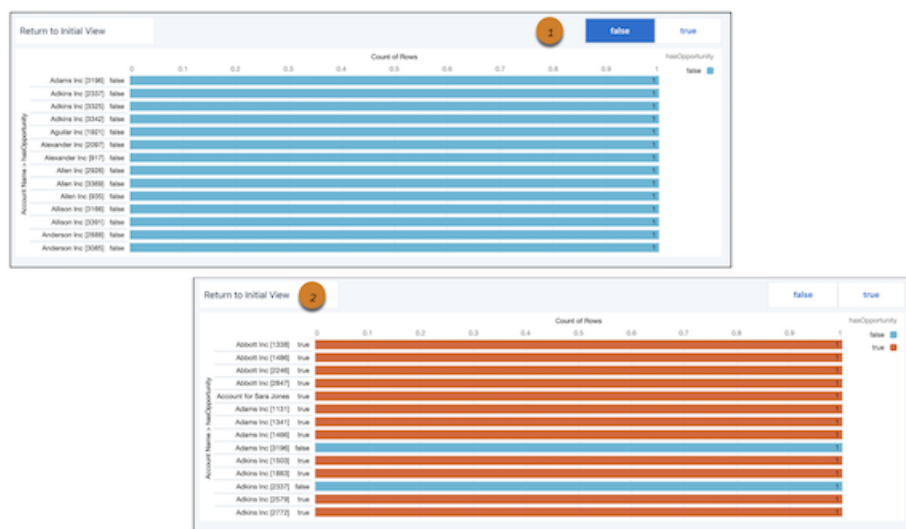
Creating a curated journey for dashboard users with single-click navigation interactions has more options. When you build a navigation flow, you can now add an action to return the user to the initial dashboard view. You can also add single-click interactions to image, number, and container widgets.

**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:** To build your navigation flow, in the dashboard editor, select the widget. On the Interactions tab on the Widget Properties panel, add a Navigate To or Return to Initial View action.



After adding the interaction, a user can filter the dashboard (1) and then click the Return to Initial View text widget (2) to reset the filters.



SEE ALSO:

[Salesforce Help: Single-Click Navigation Interactions \(can be outdated or unavailable during release preview\)](#)

## Start a Dynamic Flow Directly from a Dashboard Widget (Beta)

Launch flows from your Analytics dashboard using flow interactions. For example, on a dashboard tracking cases, design a text widget that launches your custom case assignment flow with a single click. The flow interaction passes dynamic user ID values to the flow, so users don't have to leave your dashboard to do their work. Flow interactions are available only for the text widget.

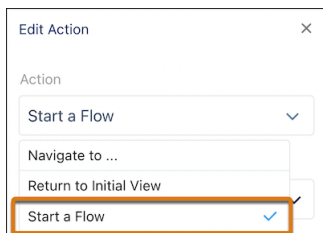
**Where:** This change applies to CRM Analytics in Lightning Experience and Salesforce Classic. CRM Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.



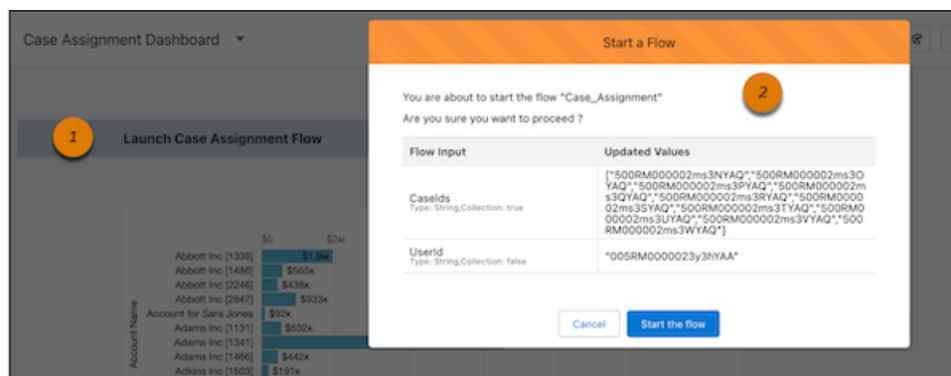
**Note:** This feature is a Beta Service. Customer may opt to try such Beta Service in its sole discretion. Any use of the Beta Service is subject to the applicable Beta Services Terms provided at [Agreements and Terms](#).

**How:** From Setup, in the Quick Find box, enter *Analytics*, and select **Settings**. Select **Enable Select and Navigate** and save.

In the dashboard editor, select the widget. On the Interactions tab on the Widget Properties panel, add a Start a Flow action and select the flow.



After adding the interaction, a user can click the text widget (1) and preview the dynamic values before starting the flow (2).



SEE ALSO:

[Salesforce Help: Configure a Start a Flow Action \(Beta\)](#) (can be outdated or unavailable during release preview)

## Explore Multiple Data Model Objects in Direct Data Using Joins (Beta)

It's now easier to analyze data model object (DMO) records where the data is normalized and related information resides in separate DMOs. To explore and draw insights from multiple DMOs simultaneously, join these objects in a single dashboard query. Direct Data for Data Cloud now supports four types of joins on data model objects with defined relationships between them. You can also filter the joined data and highlight the records that matter with conditional formatting. Previously, you wrote custom SQL queries to analyze data in multiple DMOs.

**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.

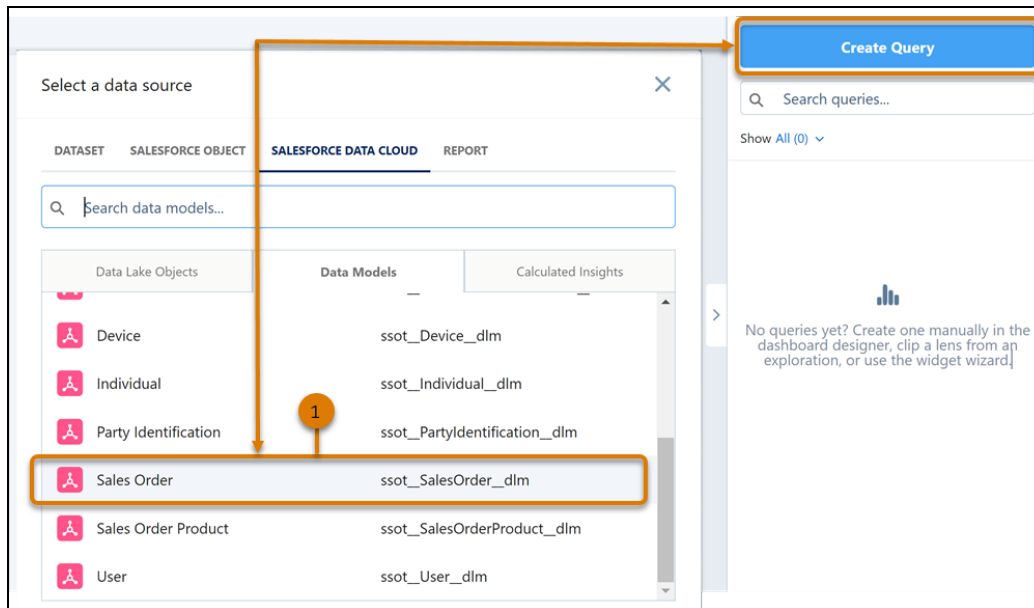


**Note:** This feature is a Beta Service. Customer may opt to try such Beta Service in its sole discretion. Any use of the Beta Service is subject to the applicable Beta Services Terms provided at [Agreements and Terms](#).

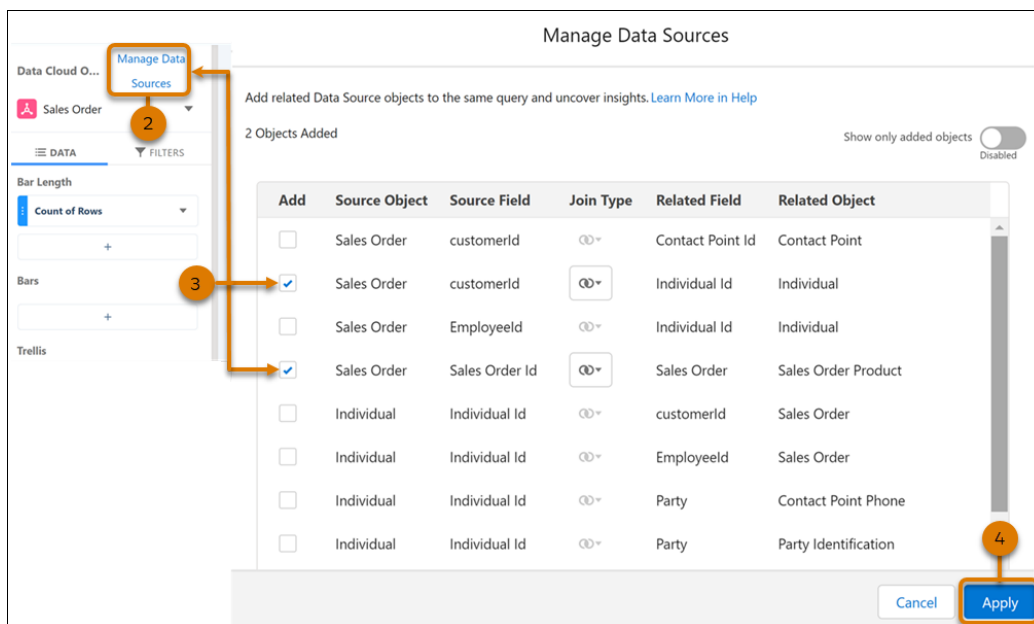
**Who:** CRM Analytics Direct Data for Data Cloud is available to users with a Data Cloud license.

**How:** For example, to compare sales order data with product and customer's annual income, in the dashboard designer, create a query on the Sales Order DMO (1).

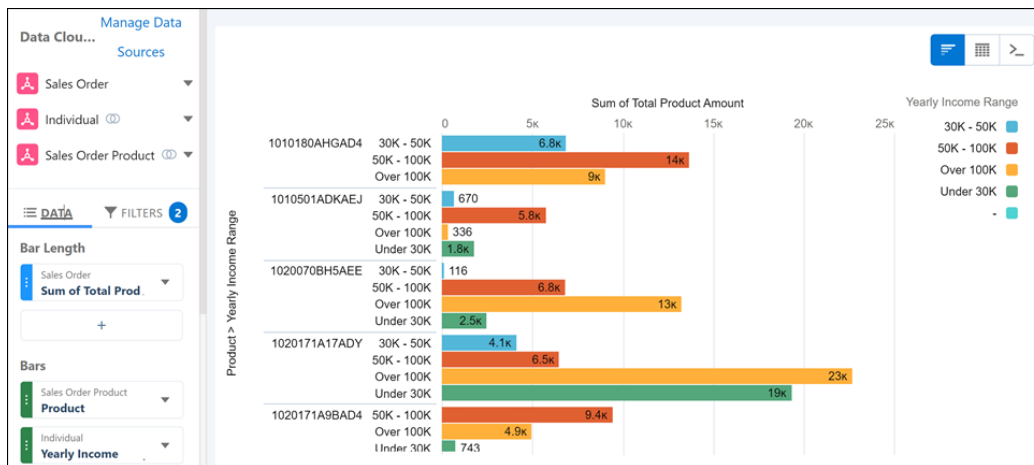




Then, in the lens mode, click **Manage Data Sources** (2). Add the related Individual and Product DMOs that you want to use (3), and apply your changes (4).



Build your query on the joined DMOs.




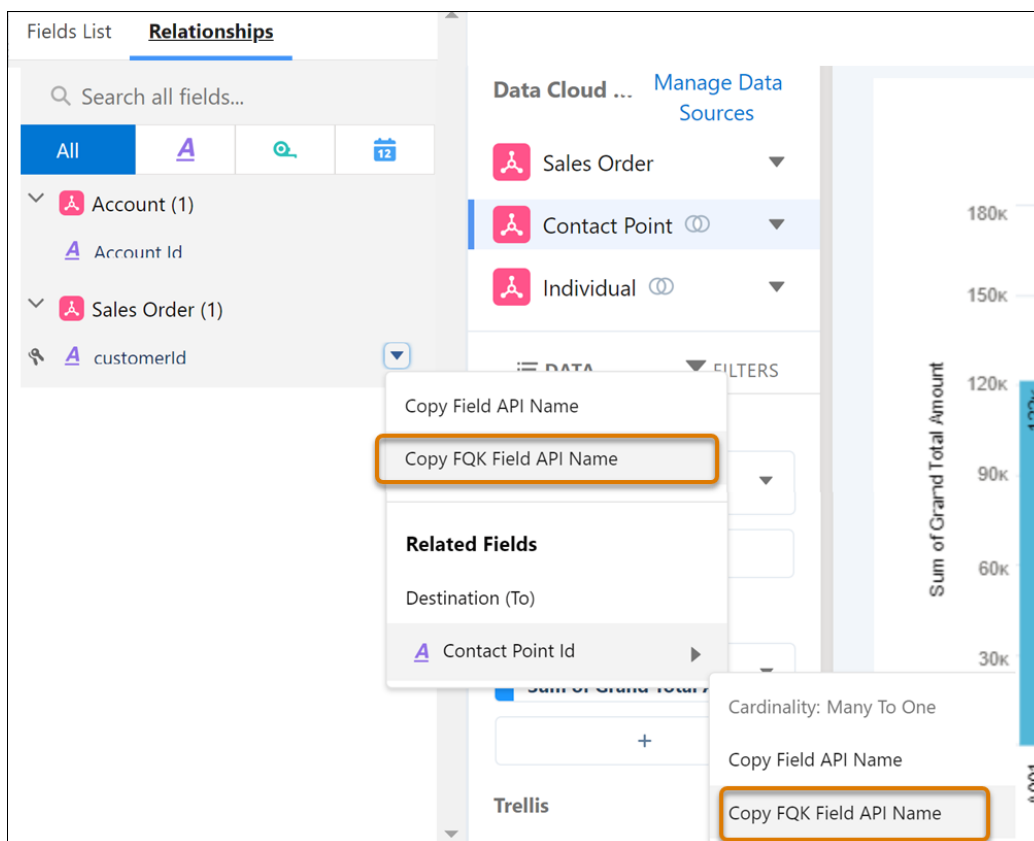
## Ensure Better Data Accuracy with Fully Qualified Keys

Avoid errors when you analyze Direct Data for Data Cloud records by including fully qualified keys (FQK) in your queries. CRM Analytics now recognizes the Data Cloud Identifier field as a dimension, so unique Data Cloud records aren't accidentally considered duplicates. For example, in a join query that analyzes sales orders from multiple data sources, add the FQKs from the sources to ensure that you don't misinterpret your sales data.

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

**Who:** CRM Analytics Direct Data for Data Cloud is available to users with a Data Cloud license with FQK enabled.

**How:** In the Fields panel, the  icon indicates an FQK field. To include the field in an SQL query, copy its API name from the field's context menu in the Fields tab. You can also copy an API name of a related source or destination FQK from a field's context menu in the Relationship tab.



## 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 and some production orgs starting in the Spring '23 release and is available for all customers starting in the Summer '23 release.

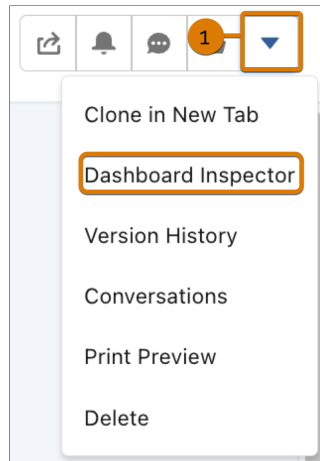
**How:** When the functionality is available, the LWC framework is the default embedding method. If needed, you can embed dashboards with an iframe. From Setup, in the Quick Find box, enter *Analytics*, and select **Settings**. Select **Use legacy iframe instead of LWC for embedded dashboards** and click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

## Troubleshoot Dashboard Performance Quickly with Dashboard Inspector 2.0

The updated Dashboard Inspector 2.0 makes performance metrics more accessible, informative, and intuitive. Quickly get actionable insights, such as dashboard recommendations, with performance checks immediately initiated when you open the Dashboard inspector. Relevant information now includes slow queries and network delays and is rendered on a single, comprehensive tab.

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

**How:** Open a dashboard, click **More** (1), and select Dashboard Inspector.



Expand sections (3) on the Performance tab to review completed metrics. Select a query (4) to view information about it.

Inspector runs dashboard queries to measure performance. [Learn more.](#)

Total Query Time 6.7s # Queries 6

✓ Performance Bottlenecks

✓ ⚠ Slow Queries

Dashboards load faster when queries are efficient.

Query 'time\_Year\_time\_Month\_16' took 5.02 seconds

Try limiting the queries to 5 seconds or less for better experience. [Learn more.](#)

✓ Query Details

Q Search queries...

QUERY	MAX TIME (SEC)
time_Year_time_Month_16 time_Year_time_Month_16	5.02
time_Year_time_Month_3 time_Year_time_Month_3	4.92
time_Year_time_Month_2 time_Year_time_Month_2	3.42
time_Year_time_Month_18	1.64
time_Year_time_Month_23	0.10
time_Year_time_Month_4 time_Year_time_Month_4	0.07

SEE ALSO:

[Salesforce Help: Optimize Dashboard Performance](#) (can be outdated or unavailable during release preview)

## Get Improved Dashboard Performance with Better Caching

Your dashboards are now more responsive and faster loading with improved caching. Caching now updates only the dashboard elements that have changed instead of a full refresh with every user interaction.

**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:** Improved dashboard caching is the default behavior. If necessary, you can turn it off. From Setup, in the Quick Find box, enter *Analytics*, and select **Settings**. Select **Disable dashboard bundle caching**.

## Experience Faster Dashboard Exploration

Explore dashboards more quickly without waiting on every interaction. You're no longer blocked from interacting with your dashboard after making a selection like applying a filter. Instead, only the widgets that are updating are paused.

**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.

## Get Improved Performance on Data Cloud Queries

Accelerated Queries for CRM Analytics runs queries on Data Cloud records faster. This feature, which is native to Data Cloud, speeds up interactivity as you explore and visualize Data Cloud objects in a CRM Analytics dashboard.

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

**Who:** CRM Analytics Direct Data for Data Cloud is available to users with a Data Cloud license.

## 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.

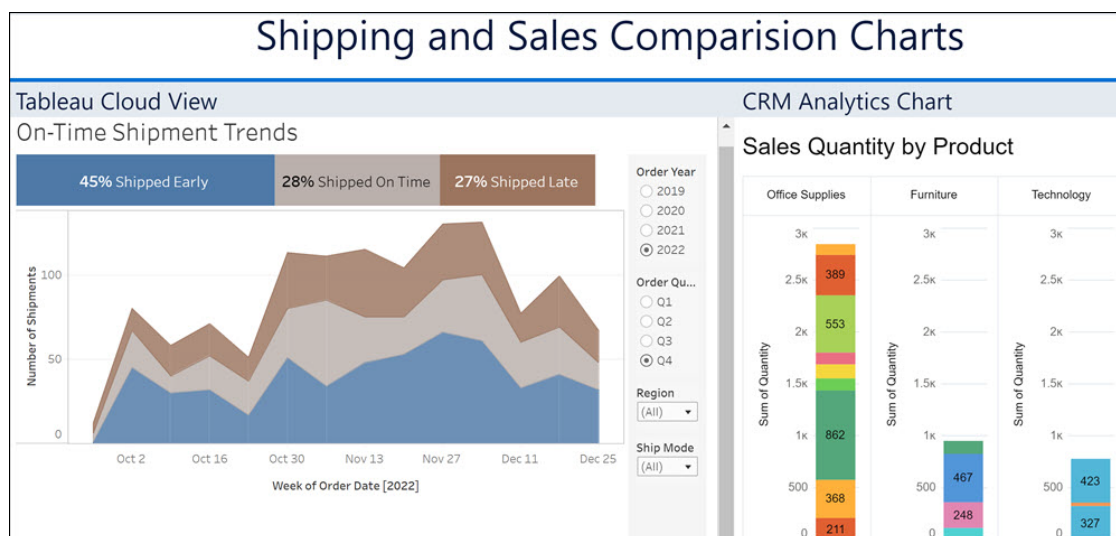
**Where:** This change applies to CRM Analytics in Lightning Experience and Salesforce Classic. CRM Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.



**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 to 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.

## Analytics Data Integration

Use staged data as an alternative to datasets to reduce processing time when your data strategy involves multiple recipes. Update to the new Google Analytics 4 connector to sync Google Analytics data.

### IN THIS SECTION:

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

Reduce processing time when your data strategy involves multiple recipes by using staged data instead of datasets. An initial recipe outputs results as staged data, and subsequent recipes can use the staged data in input nodes. For example, rather than merge account and opportunity data in each region-specific forecasting recipe, merge just one time, output the results as staged data, and use this data in the other recipes.


#### [Connect to Google Analytics 4 \(Beta\)](#)

Migrate to Google Analytics 4 to continue loading your Google Analytics data and take advantage of Google's new event-based GA4 property framework. Google Analytics 4 uses first-party and Google data to understand and analyze multiple sites and apps together. Google Analytics 4 is replacing Universal Analytics. On July 1, 2023, all standard Universal Analytics properties will stop processing data.

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

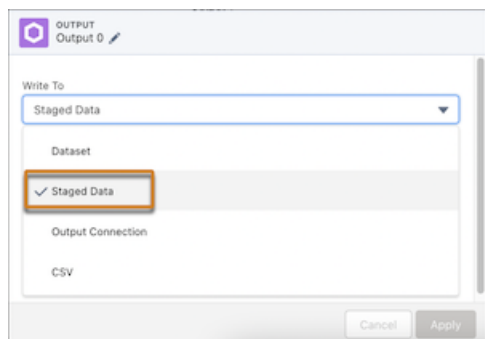
Reduce processing time when your data strategy involves multiple recipes by using staged data instead of datasets. An initial recipe outputs results as staged data, and subsequent recipes can use the staged data in input nodes. For example, rather than merge account and opportunity data in each region-specific forecasting recipe, merge just one time, output the results as staged data, and use this data in the other recipes.

**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 feature isn't available with Shield Platform.

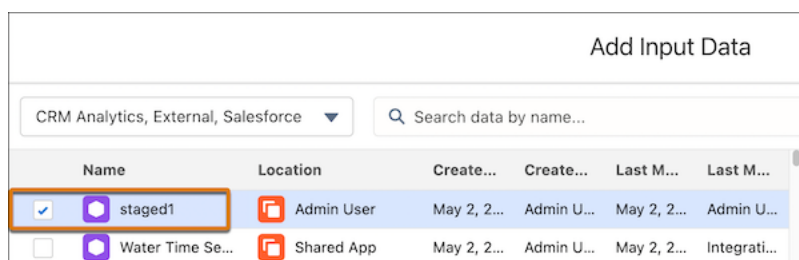
 **Note:** This feature is a Beta Service. Customer may opt to try such Beta Service in its sole discretion. Any use of the Beta Service is subject to the applicable Beta Services Terms provided at [Agreements and Terms](#).

**How:** From Setup, in the Quick Find box, enter *Analytics*, and select **Settings**. Select **Allow recipes to create staged data** and save.

In the recipe editor, build your first recipe for the sequence of recipes, add an output node, and write it to staged data.



Build your second recipe, and when adding the input data, select the staged data from your first recipe.



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


SEE ALSO:

[Salesforce Help: Run Sequential Recipes with Staged Data Output \(can be outdated or unavailable during release preview\)](#)

## Connect to Google Analytics 4 (Beta)

Migrate to Google Analytics 4 to continue loading your Google Analytics data and take advantage of Google's new event-based GA4 property framework. Google Analytics 4 uses first-party and Google data to understand and analyze multiple sites and apps together. Google Analytics 4 is replacing Universal Analytics. On July 1, 2023, all standard Universal Analytics properties will stop processing data.

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

 **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 Google Analytics 4 connection using the Data Manager and add your Google Analytics property ID to the advanced properties for each connected object.

SEE ALSO:

[Salesforce Help: Google Analytics 4 Connection \(Beta\)](#)

[External Link: Universal Analytics is going away](#)

[External Link: \[UA GA4\] Universal Analytics versus Google Analytics 4 data](#)

## Analytics Development

The Analytics Interactions guide is improved, and the mobile beta testing sign-up has a new location. Find updates to the Analytics Connect REST APIs, the `wave:sdk` Aura component, and more.

IN THIS SECTION:

[Build Dashboard Interactions with the Improved Developer Guide](#)

Check out the improved Analytics Interactions developer guide for new examples on building interactions, updated content organization, and a better getting started experience.

[Updated Location for CRM Analytics Mobile Beta Testing](#)

Information for signing up to beta test the CRM Analytics mobile app is now in Salesforce Help. Get access to the latest iOS and Android builds before they're released. You can test out new functionality and ensure your data and dashboards render correctly.

SEE ALSO:

[Salesforce Release Notes: CRM Analytics REST API updates](#)

[Salesforce Release Notes: Aura `wave:sdk` updates](#)

[Salesforce Release Notes: Lightning Component `lightning/analyticsWaveApi` updates](#)

[Salesforce Release Notes: Wave Performance Event updates](#)

### Build Dashboard Interactions with the Improved Developer Guide

Check out the improved Analytics Interactions developer guide for new examples on building interactions, updated content organization, and a better getting started experience.

SEE ALSO:

[Salesforce CRM Analytics Developer Center: Analytics Interactions](#)

### Updated Location for CRM Analytics Mobile Beta Testing

Information for signing up to beta test the CRM Analytics mobile app is now in Salesforce Help. Get access to the latest iOS and Android builds before they're released. You can test out new functionality and ensure your data and dashboards render correctly.

SEE ALSO:

[Salesforce Help: CRM Analytics Mobile Beta Testing \(can be outdated or unavailable during release preview\)](#)

## Analytics Apps

Analytics app enhancements include new and updated features for intelligent apps as well as industry and prebuilt CRM Analytics apps.

### IN THIS SECTION:

#### [Revenue Intelligence App](#)

Revenue Intelligence is a data-driven sales solution that unites CRM Analytics dashboards and analytics with an easy-to-visualize pipeline progress flow chart in Pipeline Inspection, and more.

#### [Industry Analytics Apps](#)

Enhancements for industry-specific CRM Analytics apps.

## Revenue Intelligence App

Revenue Intelligence is a data-driven sales solution that unites CRM Analytics dashboards and analytics with an easy-to-visualize pipeline progress flow chart in Pipeline Inspection, and more.

### SEE ALSO:

#### [Revenue Intelligence](#)

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

## Industry Analytics Apps

Enhancements for industry-specific CRM Analytics apps.

### SEE ALSO:

#### [Get Started with Trade Promotion Effectiveness](#)

#### [Analyze and Track Product Performance Easily](#)

#### [Analytics for Manufacturing Cloud](#)

#### [CRM Analytics Enhancements](#)

## Einstein Discovery

Turn on Decision Optimization (beta) to improve Einstein's recommendations. Migrate your Einstein Discovery models, including the configuration of the model, with packages.

### IN THIS SECTION:

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

Control Einstein's suggested improvements by incorporating your business rules, objectives, and constraints to ensure that the recommendations are relevant, feasible, and aligned to the big picture. 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 for opportunity amount and suggesting actions within time limits and budget constraints.

### Migrate Your Einstein Discovery Models (Generally Available)

Distribute your predictive models with ease using packaging. Create your model in a sandbox and, when it's production ready, promote it to production using change sets. You can also share your models widely using managed or unmanaged packages. By using packaged assets, others can use your model to make predictions based on data in their own environment. This feature, now generally available, includes some changes since the last release. Packaging now includes your model configuration so that it can be edited and retrained after migration. Previously, packages supported only the model and the prediction definition. All Analytics Model components are generally available.

SEE ALSO:

[Einstein Release Notes](#)

## Improve Recommendations with Decision Optimization (Beta)

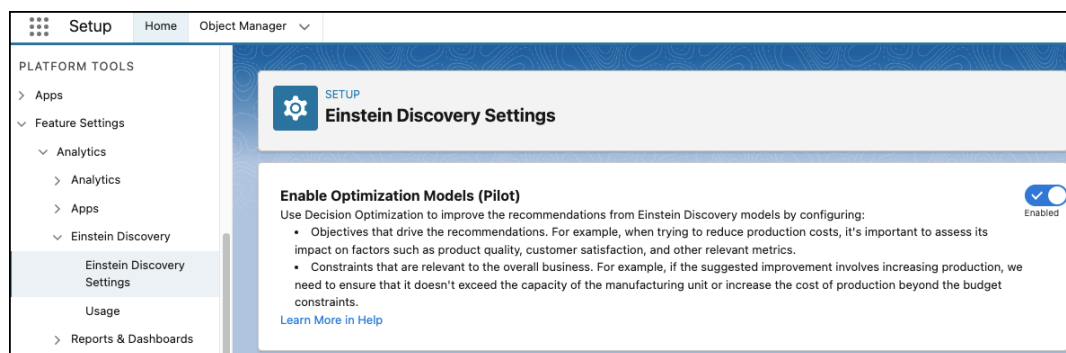
Control Einstein's suggested improvements by incorporating your business rules, objectives, and constraints to ensure that the recommendations are relevant, feasible, and aligned to the big picture. For example, send field service reps to improve customer satisfaction while limiting the number of appointments. Or, focus your sales reps on maximizing revenue and not just their win rate by optimizing for opportunity amount and suggesting actions within time limits and budget constraints.

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

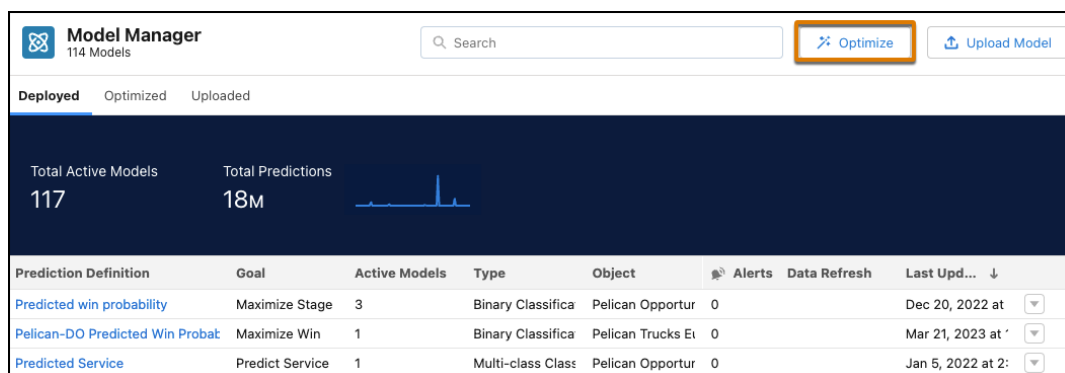


**Note:** This feature is a Beta Service. Customer may opt to try such Beta Service in its sole discretion. Any use of the Beta Service is subject to the applicable Beta Services Terms provided at [Agreements and Terms](#).

**How:** To turn on Decision Optimization, go to the new Einstein Discovery Settings page in Setup.



To use Decision Optimization, click **Optimize** in Model Manager.



Prediction Definition	Goal	Active Models	Type	Object	Alerts	Data Refresh	Last Upd...	↓
Predicted win probability	Maximize Stage	3	Binary Classifica	Pelican Opportur	0		Dec 20, 2022 at	
Pelican-DO Predicted Win Probab	Maximize Win	1	Binary Classifica	Pelican Trucks Et	0		Mar 21, 2023 at *	
Predicted Service	Predict Service	1	Multi-class Class	Pelican Opportur	0		Jan 5, 2022 at 2:	

SEE ALSO:

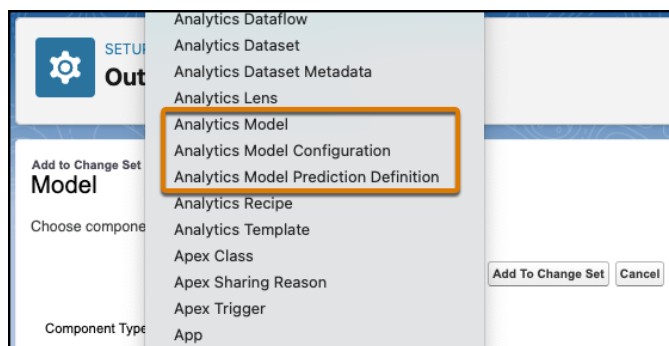
[Salesforce Help: Optimize Recommendations from Einstein Discovery Models](#)(can be outdated or unavailable during release preview)

## Migrate Your Einstein Discovery Models (Generally Available)

Distribute your predictive models with ease using packaging. Create your model in a sandbox and, when it's production ready, promote it to production using change sets. You can also share your models widely using managed or unmanaged packages. By using packaged assets, others can use your model to make predictions based on data in their own environment. This feature, now generally available, includes some changes since the last release. Packaging now includes your model configuration so that it can be edited and retrained after migration. Previously, packages supported only the model and the prediction definition. All Analytics Model components are generally available.

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

**How:** In the Component Type list of a change set, select Analytics Model, Analytics Model Configuration, or Analytics Model Prediction Definition.



SEE ALSO:

[Salesforce Help: Package and Distribute Your Models](#)(can be outdated or unavailable during release preview)

## Tableau

Use Tableau to analyze, explore, and make decisions on your data with just a few clicks. Create engaging visualizations and embed them in your Lightning pages to use them in your workflows. Tableau has enterprise analytics platform solutions for deep data exploration.

- **Tableau Cloud** is a secure, fully hosted, cloud-based, self-service platform. Use it to prepare your data, author, analyze, collaborate, publish, and share. See [Tableau Cloud Release Notes](#) for the latest updates.
- **Tableau Desktop** is a data visualization tool. Use the intuitive, drag-and-drop interface to discover hidden insights and make impactful business decisions. See [Tableau Desktop and Web Authoring Release Notes](#) for the latest updates.
- **Tableau Prep** is a data preparation tool. Use it to clean, shape, and combine data for analysis in Tableau. See [Tableau Prep Release Notes](#) for the latest updates.
- **Tableau Server** is a secure, on-premises solution for deploying Tableau in your own environment. Use it to prepare your data, author, analyze, collaborate, publish, and share. See [Tableau Server Release Notes](#) for the latest updates.

To learn more about Tableau products, go to [Tableau Help](#).

## Marketing Cloud Intelligence

With Marketing Cloud Intelligence you connect, harmonize, visualize, and act on your marketing data to optimize performance within campaigns, discover insights in real-time, and then act on them.

- [Marketing Cloud Release Notes](#)
- [Marketing Cloud Intelligence Data Pipelines Release Notes](#)
- [Marketing Cloud Intelligence Help Map](#)

## Commerce

---

Commerce Cloud enhancements include new and updated features for B2B and D2C Commerce, Omnichannel Inventory, Salesforce Order Management, and Salesforce Payments.

### IN THIS SECTION:

#### [Salesforce B2B and D2C Commerce](#)

Use the new extensions UI to enhance or replace default Salesforce Commerce processing. Use Salesforce payments in your stores. Create payment links that direct customers to branded payment pages on all devices, including mobile. Allow guests to shop in your B2B store. Segment a store into markets based on locale. Translate promotions and let customers combine discounts. Use the new commerce assistants to help set up your org and troubleshoot store issues. Export product data, and search globally.

#### [Omnichannel Inventory](#)

Track inventory reservations end to end with the new reservationId field on the Transfer, Fulfill, and Unreserve Inventory Reservation APIs. Experience the benefit of performance optimizations across the service and with initial inventory imports.

#### [Salesforce Order Management](#)

Charge fees for returns and cancellations using the updated RMA, Return Item, and Cancel Item flows. Order on behalf of a customer in B2B Commerce and D2C Commerce. Self-provision the order self-service connection. Fulfill orders quicker with pick tickets.

#### [Salesforce Payments \(Generally Available\)](#)

Salesforce Payments is now generally available on the Salesforce platform, compatible with B2B Commerce, D2C Commerce, and Salesforce Order Management. You no longer have to use the Salesforce Payments managed package, except for limited use cases, such as B2C Commerce customers who accept PayPal payments and want to issue refunds with Order Management.

## Salesforce B2B and D2C Commerce

Use the new extensions UI to enhance or replace default Salesforce Commerce processing. Use Salesforce payments in your stores. Create payment links that direct customers to branded payment pages on all devices, including mobile. Allow guests to shop in your B2B store. Segment a store into markets based on locale. Translate promotions and let customers combine discounts. Use the new commerce assistants to help set up your org and troubleshoot store issues. Export product data, and search globally.

### IN THIS SECTION:

#### [Commerce Einstein](#)

Let GPT Einstein generate product descriptions using Einstein GPT.

#### [Easily Manage Extensions](#)

Enhance or replace default Salesforce Commerce processing with Apex classes using the new Extensions UI. For example, by default, Salesforce Commerce uses standard Salesforce price books to manage how products are priced. You can select an Apex class from the new UI to use instead.

#### [Use Salesforce Payments in Your Commerce Store](#)

Add security and flexibility to your store by using Salesforce Payments as your payment provider. Salesforce Payments is a direct integration that works seamlessly with your store, so you can quickly activate a wide variety of payment options to offer at checkout. Previously, you had to install a third-party payment provider or managed package. Plus, customers can update their saved payment methods directly from their profile.

#### [Embed Pay Now on Different Salesforce Apps](#)

Provide your customers a seamless payment experience with Salesforce Pay Now. Create payment links that direct customers to branded payment pages on all devices, including mobile. Each link takes your customer to a Pay Now page you create in Experience Builder. You can drag Pay Now and a Pay Now Confirmation component onto the Pay Now page so that your shoppers can choose the payment methods and payment amount and receive a confirmation of their payment. You can associate a payment link with any record in Salesforce, making it easy to integrate it with other Salesforce apps.

#### [Let Guests Shop in Your B2B Store](#)

Fully open your business to the public! If you built your B2B store with an LWR template, guest buyers can now add items to their cart and make purchases. This change also gives you more guest access controls for B2C stores.

#### [Create Customer Experiences Based on Market Locale](#)

Instead of standing up multiple stores for different regions, use one store and segment your customers into markets based on locale. When customers visit your B2B or B2C store, they can choose which locale they want to see. Based on their selection, the store displays prices, promotions, and entitlements specific to their market.

#### [Provide Translations for Promotions](#)

Manually enter translated text for promotion names, display names, and terms and conditions. Help shoppers understand promotion details by supporting multiple languages in your store.

#### [Let Shoppers Combine Promotion Discounts](#)

Entice shoppers to buy more by allowing multiple discounts based on exclusivity. Choose whether to make a promotion non-exclusive or exclusive. Customers can combine a non-exclusive promotion with other promotions, and they can only combine a class-exclusive promotion with a promotion of the same class. For example, you want only one product promotion per product or one transaction promotion per order. Shoppers can apply a promotion with global exclusivity to an entire order.

#### [Use Promotion Market Segments to Target the Right Customers](#)

Use segments to associate your promotion with stores and buyer groups. Customers see the promotion if they're a member of any of the assigned stores or buyer groups. You can apply one promotion segment at a time to a store. A promotion segment can have up to 50 automatic and 50 manual active commerce promotions.

### [Improve SEO with Custom URL Slugs \(Beta\)](#)

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 slug improves SEO by replacing the record ID in the URL with relevant and human-readable information, ensuring that your store’s pages are optimally surfaced in search engines. You can also bulk import URL slugs with a CSV file.

### [Customize Store Search with the Search Results Rules API](#)

Define rules for search results with the new Connect REST API resource. For example, set an include rule to have a query for “couch” also search synonymous terms like “sofa” and vice versa.

### [Display Suggested Products in Search with the Product Search Suggestions API](#)

Render suggested products as a customer enters a search query using the updated Commerce Webstore Product Search Suggestions Connect REST API resource. You can now configure queries to return both the search term and product suggestions directly in the search bar.

### [Create Rich Search Results with Structured Data \(Pilot\)](#)

Use structured data from your store to dynamically update a page’s meta tags, which are processed and surfaced by search engines. For example, you can inform search engines about category names and product attributes like color, size, and material. This information creates richer and more accurate search results.

### [Choose Which Product Fields to Display \(Pilot\)](#)

Select which product fields to make visible to customers in your store. Add fields to help users narrow search results, or reduce the number of fields to get faster page loads. To make your chosen fields displayable, save them and rebuild the search index.

### [Set Up Your Org Quickly with the Commerce Setup Assistant](#)

Configure your org for Commerce with just a few clicks with the aid of the Commerce Setup Assistant. The assistant optimizes org preferences and adds layouts for Commerce objects that include the information that you need for Commerce records.

### [Troubleshoot Store Issues with the Commerce Assistant](#)

If you’re having trouble configuring or managing a store, ask the new Commerce Assistant. The Commerce Assistant shows you information to help solve the issue, including the tasks required to configure a store and which of those tasks have been completed.

### [Export Product Data to a CSV File](#)

Export data for up to 300,000 products, including product variations, to a CSV file. The export file includes the product columns selected in the workspace. The file includes only the products in the workspace after filters are applied.

### [Easily Manage Content with Enhanced CMS](#)

New Commerce orgs now have the Enhanced Sites and Content Platform setting turned on. The setting enables the enhanced CMS for stores that are based on the LWR platform. With enhanced CMS, you can create and publish content more easily using a simplified UI. You can use translated content variants and manual collections to help put the right content in front of the right audience. Add extensions for spell checkers and other productivity-enhancing tools to the sidebar in the CMS content editor. Orgs provisioned with Commerce before Summer '23 don't yet have access to enhanced CMS. Orgs created from trial force templates, such as a new demo org, have enhanced CMS enabled. To avoid performance issues, don't disable the Enhanced Sites and Content Platform setting.

### [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 that your store doesn't support, search results are returned in the store's default language.

### [Use Einstein Search Suggestions in D2C Commerce](#)

With Einstein Search Suggestions, your store customers see relevant search terms as they type. Relevance is based on each person's recent search history. Suggestions appear when you first click the Search field and when you start entering terms. Previously, Einstein Search Suggestions was available only in B2B stores.

### [Accelerate Self-Service Reorders with a Commerce Reorder Portal](#)

Give your buyers a streamlined reorder experience with a Commerce Reorder Portal. In the portal's simplified UI, a buyer can view past orders, modify quantities, place new orders, and view order statuses. Based on a recommendation from Einstein Next Best Action, a rep can invite a buyer to the portal directly from the Order Detail page.

### [Commerce Components](#)

Use the Payments Processing component to customize the processing message. Format currency with Currency Formatter. Have your market customers select which country they're coming from with Country Selector. Let customers create wishlists. Add Quick Order to your stores so that customers can shop faster.

## Commerce Einstein

Let GPT Einstein generate product descriptions using Einstein GPT.

### IN THIS SECTION:

#### [Enhance Product Descriptions with Einstein Generative AI](#)

Generate product descriptions using Einstein Generative AI. Einstein uses your instructions to generate a revised product description, optimized for SEO, for a selected product in your B2B or B2C store. Then review the generated description and accept or reject the changes. You need the Einstein Generative AI license to use Einstein Generative AI. Contact your account executive for more information.

## Enhance Product Descriptions with Einstein Generative AI

Generate product descriptions using Einstein Generative AI. Einstein uses your instructions to generate a revised product description, optimized for SEO, for a selected product in your B2B or B2C store. Then review the generated description and accept or reject the changes. You need the Einstein Generative AI license to use Einstein Generative AI. Contact your account executive for more information.

**Where:** This change applies to B2B Commerce and D2C Commerce in the Unlimited edition.

This change applies to Lightning Experience in Unlimited editions with Commerce Einstein and the Einstein Generative AI for Commerce add-on. Einstein is available in Lightning Experience.

Einstein Generative AI for Commerce charges only for the activity you use. Learn how Commerce Cloud tracks your usage against your subscription allowance. For each Einstein feature, credit usage depends on the size of the request and the response from Einstein.

To learn more or get updates on your Commerce credit usage, contact your Salesforce account executive.

**Why:** You need assurances that AI output is trustworthy and accurate. You can rely on Salesforce to uphold our #1 value, trust, and treat your data with care and security at the forefront.

**How:** From Setup, enable Einstein to use generative AI features. Then from the Product Workspace, select a product. Click **Create** to give instructions to Einstein to generate text.

### SEE ALSO:

[About Einstein GPT](#)

[Manage Products in the Product Workspace](#)

## Easily Manage Extensions

Enhance or replace default Salesforce Commerce processing with Apex classes using the new Extensions UI. For example, by default, Salesforce Commerce uses standard Salesforce price books to manage how products are priced. You can select an Apex class from the new UI to use instead.



**Where:** This change applies to B2B Commerce and D2C Commerce in Enterprise, Unlimited, and Developer editions.

**When:** Extensions are being released gradually to gather feedback from users. The current availability of each extension is as follows:

- Cart Summary (Beta)
- Inventory Cart Calculator (Dev Preview)
- Inventory Service (Dev Preview)
- Pricing Cart Calculator (Beta)
- Pricing Service (GA)
- Promotions Cart Calculator (Beta)
- Shipping Cart Calculator (Beta)
- Tax Cart Calculator (Beta)

**How:** From your store's home page, select **Administration > Extensions**.

SEE ALSO:

[Salesforce Help: Manage Extensions for Stores \(can be outdated or unavailable during release preview\)](#)

## Use Salesforce Payments in Your Commerce Store

Add security and flexibility to your store by using Salesforce Payments as your payment provider. Salesforce Payments is a direct integration that works seamlessly with your store, so you can quickly activate a wide variety of payment options to offer at checkout. Previously, you had to install a third-party payment provider or managed package. Plus, customers can update their saved payment methods directly from their profile.

**Where:** This change applies to B2B Commerce and D2C Commerce in Enterprise, Unlimited, and Developer editions.

**Who:** Using Salesforce Payments as a payment provider requires a Salesforce Payments license and an LWR template.

**How:** On your store Administration page, select Salesforce Payments as your payment provider. Next, in Experience Builder, add the Salesforce Payments component to your Checkout page. Finally, customize the Saved Payment Methods page and add it to the Navigation List Menu.

SEE ALSO:

[Salesforce Payments \(Generally Available\)](#)

[Salesforce Help: Add a Payment Service for Store Checkout \(can be outdated or unavailable during release preview\)](#)

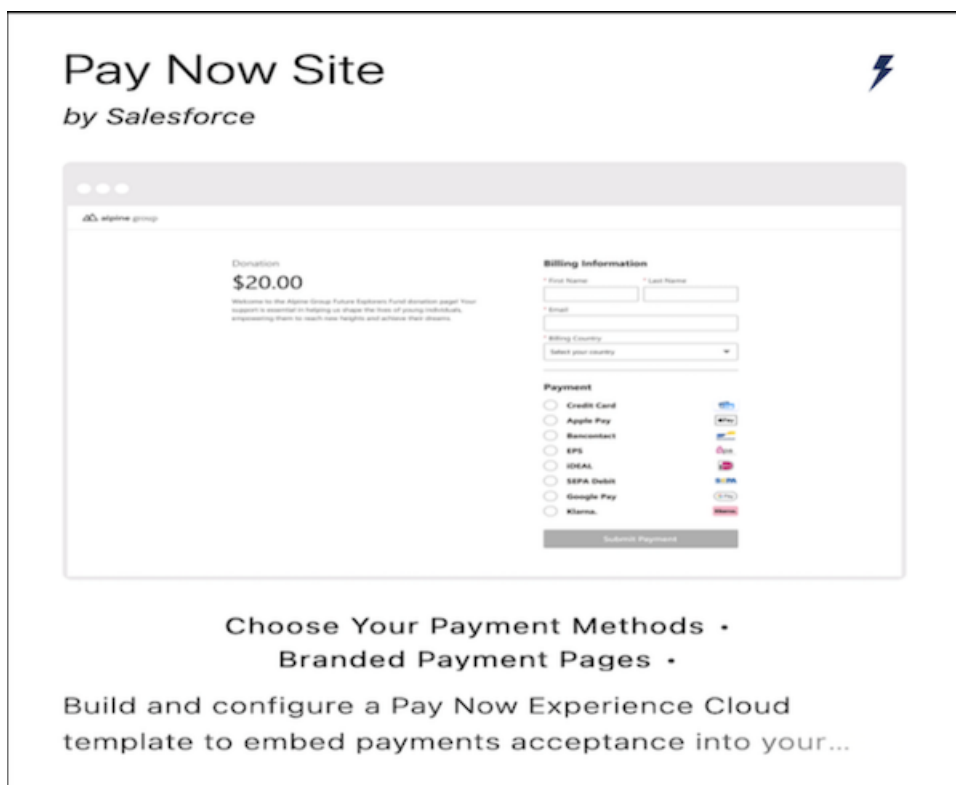
## Embed Pay Now on Different Salesforce Apps

Provide your customers a seamless payment experience with Salesforce Pay Now. Create payment links that direct customers to branded payment pages on all devices, including mobile. Each link takes your customer to a Pay Now page you create in Experience Builder. You can drag Pay Now and a Pay Now Confirmation component onto the Pay Now page so that your shoppers can choose the payment methods and payment amount and receive a confirmation of their payment. You can associate a payment link with any record in Salesforce, making it easy to integrate it with other Salesforce apps.

**Where:** This change applies to B2B Commerce and D2C Commerce in Enterprise, Unlimited, Developer and Starter editions.

**Who:** This feature is available to users who have the Automotive Foundation User and the Industry Sales Excellence permission sets.

**How:** Clone the Pay Now Site template to get started.



SEE ALSO:

[Salesforce Help: LWR Store Components](#)(can be outdated or unavailable during release preview)

## Let Guests Shop in Your B2B Store

Fully open your business to the public! If you built your B2B store with an LWR template, guest buyers can now add items to their cart and make purchases. This change also gives you more guest access controls for B2C stores.

**Where:** This change applies to B2B Commerce and D2C Commerce in Enterprise, Unlimited, and Developer editions.

**How:** From the Administration page, enable the guest buyer profile and customize the guest experience. If you turn on guest checkout access, make sure to add the Guest Contact Information component to the Checkout page in Experience Builder. We also recommend that you assign guest record ownership to a user with the Commerce Business User Profile.

SEE ALSO:

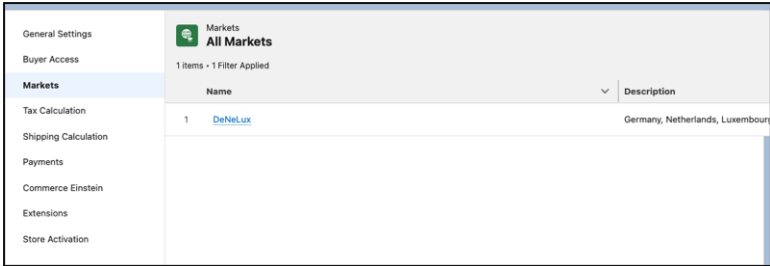
[Salesforce Help: Manage Guest Access](#) (can be outdated or unavailable during release preview)

## Create Customer Experiences Based on Market Locale

Instead of standing up multiple stores for different regions, use one store and segment your customers into markets based on locale. When customers visit your B2B or B2C store, they can choose which locale they want to see. Based on their selection, the store displays prices, promotions, and entitlements specific to their market.

**Where:** This change applies to B2B Commerce and D2C Commerce in Enterprise, Unlimited, and Developer editions.

**How:** From your store's home page, select **Administration > General Settings > Markets**.



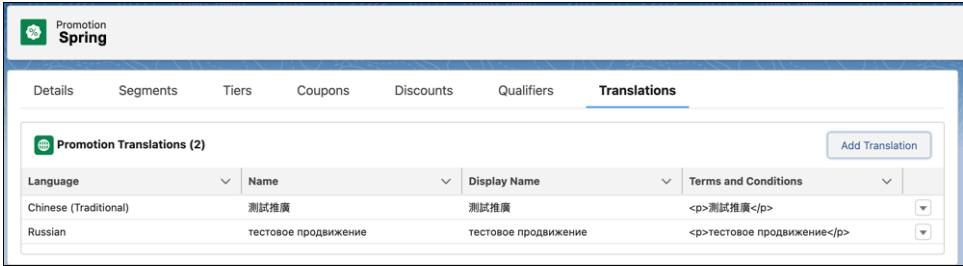
SEE ALSO:  
[Salesforce Help: Segment a Store Into Markets Based on Locale \(can be outdated or unavailable during release preview\)](#)

## Provide Translations for Promotions

Manually enter translated text for promotion names, display names, and terms and conditions. Help shoppers understand promotion details by supporting multiple languages in your store.

**Where:** This change applies to B2B Commerce and D2C Commerce in Enterprise, Unlimited, and Developer editions.

**How:** In the promotion, click the Translations tab. Add a translation, select the language, and enter the translated promotion name, display name, and terms and conditions.



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

## Let Shoppers Combine Promotion Discounts

Entice shoppers to buy more by allowing multiple discounts based on exclusivity. Choose whether to make a promotion non-exclusive or exclusive. Customers can combine a non-exclusive promotion with other promotions, and they can only combine a class-exclusive promotion with a promotion of the same class. For example, you want only one product promotion per product or one transaction promotion per order. Shoppers can apply a promotion with global exclusivity to an entire order.

**Where:** This change applies to B2B Commerce and D2C Commerce in Enterprise, Unlimited, and Developer editions.

**How:** When you create a promotion, select the exclusivity type.

**New Promotion**

**Promotion Details**

\*Name

Owner Name  
Admin User

Description

Objective

Display Name

Active ☐

Qualifier Criteria <sup>?</sup>

Commerce Promotion ☐

Target Criteria <sup>?</sup>

Priority Number

Discount Order <sup>?</sup>

Exclude qualifying items from discounts ☐

Exclusivity Type

Discount Restriction <sup>?</sup>

SEE ALSO:

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

## Use Promotion Market Segments to Target the Right Customers

Use segments to associate your promotion with stores and buyer groups. Customers see the promotion if they're a member of any of the assigned stores or buyer groups. You can apply one promotion segment at a time to a store. A promotion segment can have up to 50 automatic and 50 manual active commerce promotions.

**Where:** This change applies to B2B Commerce and D2C Commerce in Enterprise, Unlimited, and Developer editions.

**How:** When you create a promotion, make it a commerce promotion. Then create and assign your promotion market segments.


SEE ALSO:

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

## Improve SEO with Custom URL Slugs (Beta)

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 slug improves SEO by replacing the record ID in the URL with relevant and human-readable information, ensuring that your store's pages are optimally surfaced in search engines. You can also bulk import URL slugs with a CSV file.

**Where:** This change applies to B2B Commerce and D2C Commerce LWR sites in Enterprise, Unlimited, and Developer editions.

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

**How:** From Setup, in the Quick Find box, enter Digital Experiences, and then click **Settings**. Select **Allow the use of SEO-friendly URL slugs in Salesforce Commerce LWR sites (Beta)**.

SEE ALSO:

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

## Customize Store Search with the Search Results Rules API

Define rules for search results with the new Connect REST API resource. For example, set an include rule to have a query for “couch” also search synonymous terms like “sofa” and vice versa.

**Where:** This change applies to B2B Commerce and D2C Commerce in Enterprise, Unlimited, and Developer editions.

SEE ALSO:

[Connect REST API Developer Guide: Commerce Webstore Search Results Rules \(can be outdated or unavailable during release preview\)](#)

## Display Suggested Products in Search with the Product Search Suggestions API

Render suggested products as a customer enters a search query using the updated Commerce Webstore Product Search Suggestions Connect REST API resource. You can now configure queries to return both the search term and product suggestions directly in the search bar.

**Where:** This change applies to B2B Commerce and D2C Commerce in Enterprise, Unlimited, and Developer editions.


SEE ALSO:

[Connect REST API Developer Guide: Commerce Webstore Product Search Suggestions \(can be outdated or unavailable during release preview\)](#)

## Create Rich Search Results with Structured Data (Pilot)

Use structured data from your store to dynamically update a page’s meta tags, which are processed and surfaced by search engines. For example, you can inform search engines about category names and product attributes like color, size, and material. This information creates richer and more accurate search results.

**Where:** This change applies to B2B Commerce and D2C 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: Structured Data for Meta Tags \(Pilot\) \(can be outdated or unavailable during release preview\)](#)

## Choose Which Product Fields to Display (Pilot)

Select which product fields to make visible to customers in your store. Add fields to help users narrow search results, or reduce the number of fields to get faster page loads. To make your chosen fields displayable, save them and rebuild the search index.

**Where:** This change applies to B2B Commerce and D2C Commerce 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.

**How:** On your store's Administration tab, click **Displayable Fields**.

The screenshot shows the 'B2C Codecept Store Administration' interface. On the left is a sidebar with navigation links: General Settings, Buyer Access, Markets, Tax Calculation, Shipping Calculation, Payments, **Displayable Fields** (highlighted), Commerce Einstein, Extensions, and Store Activation. The main content area is titled 'Displayable Fields' with a sub-header '4 Items - Sorted By Field Name' and a 'Manage Fields' button. Below this is a table with three columns: Field Label, Field Name, and Field Type.

Field Label	Field Name	Field Type
Product Name	Name	Product - Standard Field
Product Code	ProductCode	Product - Standard Field
Product SKU	StockKeepingUnit	Product - Standard Field
Product Type	Type	Product - Standard Field

SEE ALSO:

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

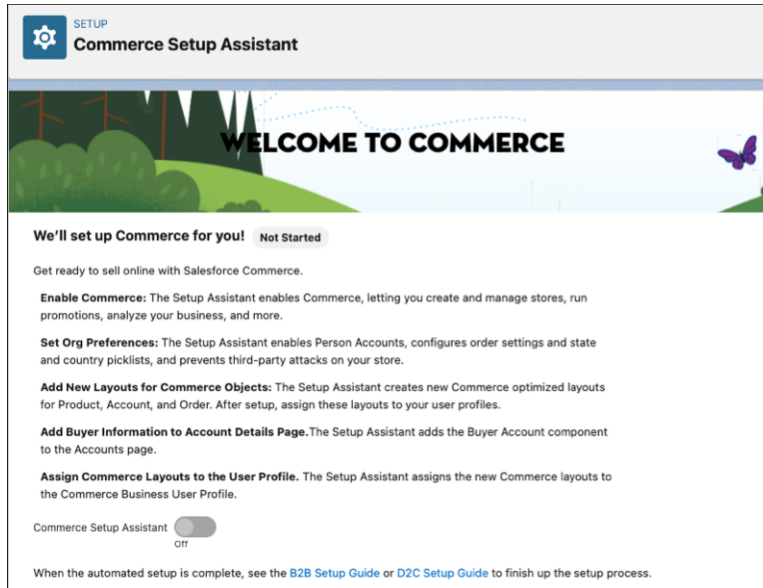
[Salesforce Help: Rebuild the Search Index \(can be outdated or unavailable during release preview\)](#)

## Set Up Your Org Quickly with the Commerce Setup Assistant

Configure your org for Commerce with just a few clicks with the aid of the Commerce Setup Assistant. The assistant optimizes org preferences and adds layouts for Commerce objects that include the information that you need for Commerce records.

**Where:** This change applies to B2B Commerce and D2C Commerce in Enterprise, Unlimited, and Developer editions. If Commerce is already enabled in your org, the switch is disabled and you can't turn on the Setup Assistant.

**How:** From Setup, go to **Feature Settings > Commerce > Commerce Setup Assistant**.



#### SEE ALSO:

[B2B Commerce Setup Guide \(can be outdated or unavailable during release preview\)](#)

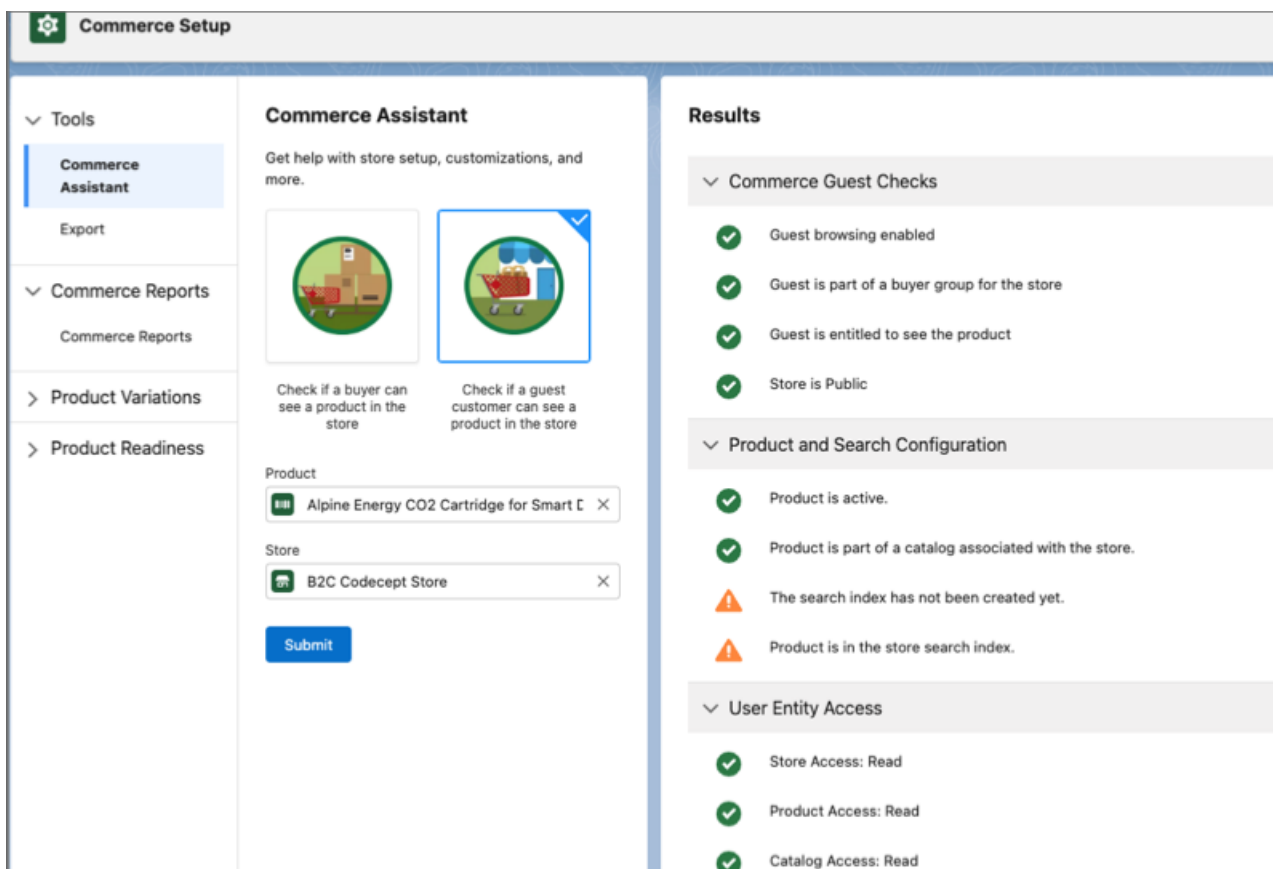
[D2C Commerce Setup Guide \(can be outdated or unavailable during release preview\)](#)

## Troubleshoot Store Issues with the Commerce Assistant

If you're having trouble configuring or managing a store, ask the new Commerce Assistant. The Commerce Assistant shows you information to help solve the issue, including the tasks required to configure a store and which of those tasks have been completed.

**Where:** This change applies to B2B Commerce and D2C Commerce in Enterprise, Unlimited, and Developer editions.

**How:** From Commerce Setup, go to **Tools > Commerce Assistant**.



SEE ALSO:

[Salesforce Help: Check or Troubleshoot Store Issues \(can be outdated or unavailable during release preview\)](#)

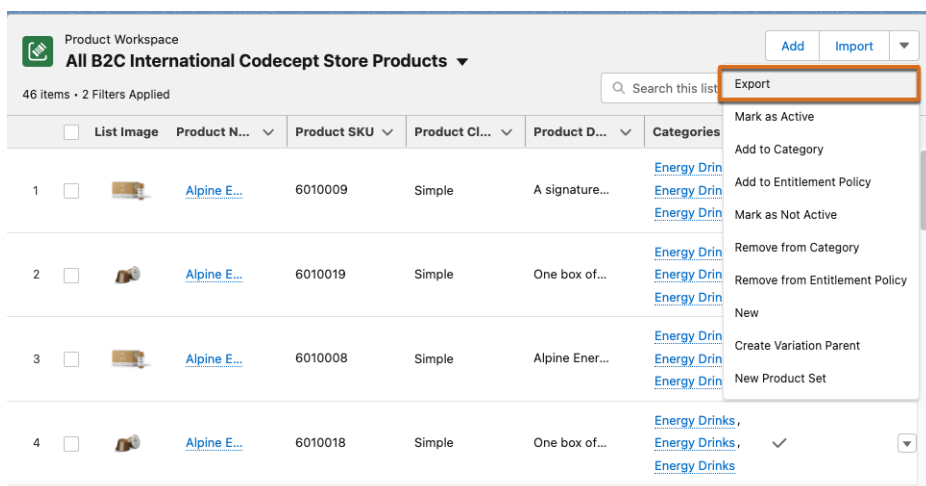
## Export Product Data to a CSV File

Export data for up to 300,000 products, including product variations, to a CSV file. The export file includes the product columns selected in the workspace. The file includes only the products in the workspace after filters are applied.

**Where:** This change applies to B2B Commerce and D2C Commerce in Enterprise, Unlimited, and Developer editions.

**How:** From the product workspace, click **Export**.





SEE ALSO:

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

## Easily Manage Content with Enhanced CMS

New Commerce orgs now have the Enhanced Sites and Content Platform setting turned on. The setting enables the enhanced CMS for stores that are based on the LWR platform. With enhanced CMS, you can create and publish content more easily using a simplified UI. You can use translated content variants and manual collections to help put the right content in front of the right audience. Add extensions for spell checkers and other productivity-enhancing tools to the sidebar in the CMS content editor. Orgs provisioned with Commerce before Summer '23 don't yet have access to enhanced CMS. Orgs created from trial force templates, such as a new demo org, have enhanced CMS enabled. To avoid performance issues, don't disable the Enhanced Sites and Content Platform setting.

**Where:** This change applies to B2B Commerce and D2C Commerce in Enterprise, Unlimited, and Developer editions.

**How:** When you create a store, an enhanced CMS default workspace is assigned to the store and a public channel to that workspace is created.

SEE ALSO:

[Salesforce Help: Default Entities for Import to Stores \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: What Is the Enhanced Sites and Content Platform? \(can be outdated or unavailable during release preview\)](#)

## 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 that your store doesn't support, search results are returned in the store's default language.

**Where:** This change applies to B2B Commerce and D2C Commerce in Enterprise, Unlimited, and Developer editions.

SEE ALSO:

[Salesforce Help: Languages Supported for Search Results \(can be outdated or unavailable during release preview\)](#)

## Use Einstein Search Suggestions in D2C Commerce

With Einstein Search Suggestions, your store customers see relevant search terms as they type. Relevance is based on each person's recent search history. Suggestions appear when you first click the Search field and when you start entering terms. Previously, Einstein Search Suggestions was available only in B2B stores.

**Where:** This change applies to D2C Commerce in Enterprise, Unlimited, and Developer editions.

SEE ALSO:

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

## Accelerate Self-Service Reorders with a Commerce Reorder Portal

Give your buyers a streamlined reorder experience with a Commerce Reorder Portal. In the portal's simplified UI, a buyer can view past orders, modify quantities, place new orders, and view order statuses. Based on a recommendation from Einstein Next Best Action, a rep can invite a buyer to the portal directly from the Order Detail page.

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

**How:** Create a reorder portal with the Commerce Reorder Portal (LWR) template in Experience Builder. Set up the store with your product catalog and other Commerce configurations. Then, add an Einstein Next Best Action component to the Order record page.

SEE ALSO:

[Salesforce Help: Commerce Reorder Portal](#) (can be outdated or unavailable during release preview)

## Commerce Components

Use the Payments Processing component to customize the processing message. Format currency with Currency Formatter. Have your market customers select which country they're coming from with Country Selector. Let customers create wishlists. Add Quick Order to your stores so that customers can shop faster.

IN THIS SECTION:

[Build B2B and B2C Stores Using the Same LWR Technology and Components](#)

When you create a store, you can select either the B2C or B2B template based on the Lightning Web Runtime (LWR). The Aura template for B2B stores is no longer available. By having all stores use the same platform, you can build B2C and B2B stores using the same technology and components. And because the LWR components use building blocks, which break up large components into smaller units, they're easier to customize. If you're using a B2B store built on an older Aura template, we recommend migrating the store to an LWR template.

[Customize the Payment Processing Message](#)

If you use Salesforce Payments as your payment provider, you now have more control over the customer experience during redirects. When you offer a payment method at checkout that sends customers to a third-party site, you can customize the page that brings them back to your store. For example, remind customers not to click away from the page, or let them know when processing fails.

[Easily Format Currency in Your Stores](#)

Add the new Currency Formatter component to make sure that your store displays currency in the correct format for the country that the shopper or buyer selects. You can add the component to any page in a LWR B2B or B2C store template.

[Let Customers Select the Country for Their Store](#)

Add the new Country Selector component to your store to let customers choose their location. Their selection determines which language, currency, prices, products, and promotions they see. The customer can choose from up to 25 different countries.

### Streamline Checkout for Mobile Customers

Make it easier for your mobile customers to complete their purchases. On the Cart page in your store, place the Checkout Button component inside the new Sticky Container component. Components in the Sticky Container remain on the page as customers scroll.

### Design Product Pages with Ease Using Components

Customize your product detail pages with manageable product components now included in the B2C store template. The components align with those available on the B2B template. The Product Set component is also available on the LWR template for B2B stores.

### Improve Customer Experience with a Wishlist

Improve the customer shopping experience by adding a Wishlist to your storefront. Customers can add items to their wishlist from the product detail page. They can access the Wishlist page by clicking the heart icon in the header or through the My Account menu. From the Wishlist page, they can remove items or add them to their cart.

### Shop Faster with Quick Order

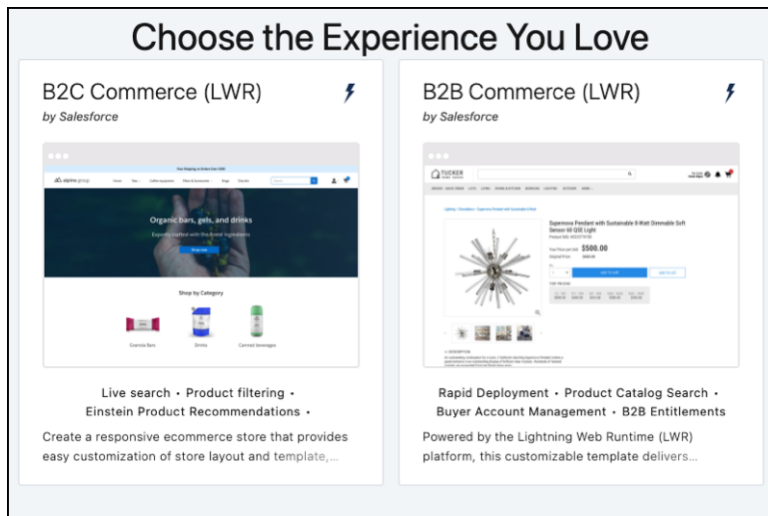
Customers no longer have to click around your store to locate products. They can now use the Quick Order component to enter SKUs and go directly to the cart. Previously, this component wasn't available in stores created with the LWR template.

## Build B2B and B2C Stores Using the Same LWR Technology and Components

When you create a store, you can select either the B2C or B2B template based on the Lightning Web Runtime (LWR). The Aura template for B2B stores is no longer available. By having all stores use the same platform, you can build B2C and B2B stores using the same technology and components. And because the LWR components use building blocks, which break up large components into smaller units, they're easier to customize. If you're using a B2B store built on an older Aura template, we recommend migrating the store to an LWR template.

**Where:** This change applies to B2B Commerce and D2C Commerce in Enterprise, Unlimited, and Developer editions.

**How:** To create a store based on LWR, in the Commerce app navigation menu, select **Stores** and then select **Create a Store**. Select the LWR template that you want to use.



SEE ALSO:

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

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

## Customize the Payment Processing Message

If you use Salesforce Payments as your payment provider, you now have more control over the customer experience during redirects. When you offer a payment method at checkout that sends customers to a third-party site, you can customize the page that brings them back to your store. For example, remind customers not to click away from the page, or let them know when processing fails.

**Where:** This change applies to B2B Commerce and D2C Commerce in Enterprise, Unlimited, and Developer editions.

**How:** In Experience Builder, go to the Payment Processing page. In the Payment Processing component, customize the text.

SEE ALSO:

[Use Salesforce Payments in Your Commerce Store](#)

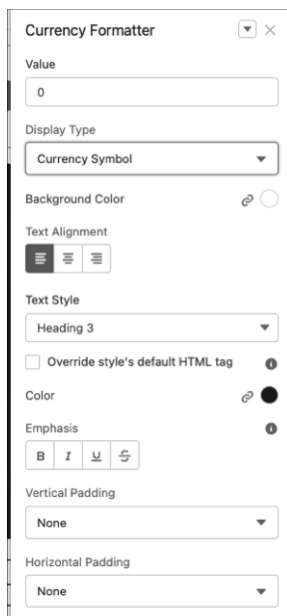
[Salesforce Payments \(Generally Available\)](#)

## Easily Format Currency in Your Stores

Add the new Currency Formatter component to make sure that your store displays currency in the correct format for the country that the shopper or buyer selects. You can add the component to any page in a LWR B2B or B2C store template.

**Where:** This change applies to B2B Commerce and D2C Commerce in Enterprise, Unlimited, and Developer editions.

**How:** In Experience Builder, drag the Currency Formatter component to the store page.

The image shows the configuration panel for the 'Currency Formatter' component. It includes a 'Value' input field with '0'. The 'Display Type' is set to 'Currency Symbol'. There are options for 'Background Color' (with a color picker), 'Text Alignment' (left, center, right), 'Text Style' (Heading 3), an 'Override style's default HTML tag' checkbox, 'Color' (with a color picker), 'Emphasis' (bold, italic, underline, strikethrough), 'Vertical Padding' (None), and 'Horizontal Padding' (None).

SEE ALSO:

[Salesforce Help: Configure Store Language, Currency, and Tax \(can be outdated or unavailable during release preview\)](#)

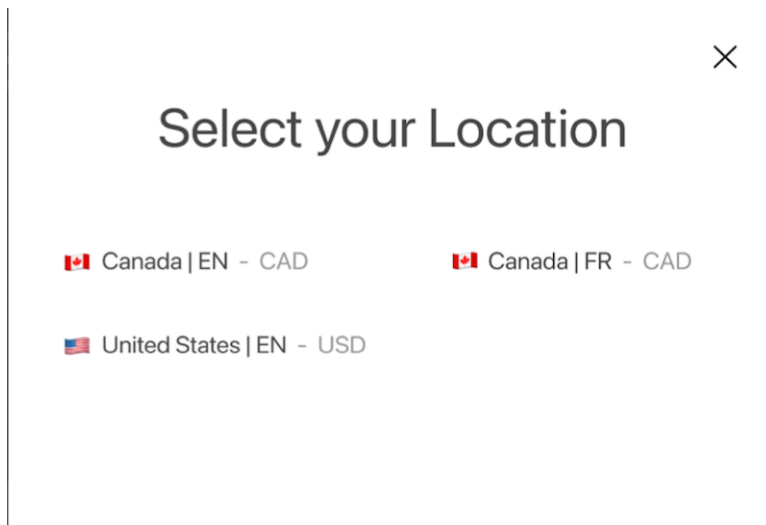
[Salesforce Help: LWR Store Components \(can be outdated or unavailable during release preview\)](#)

## Let Customers Select the Country for Their Store

Add the new Country Selector component to your store to let customers choose their location. Their selection determines which language, currency, prices, products, and promotions they see. The customer can choose from up to 25 different countries.

**Where:** This change applies to B2B Commerce and D2C Commerce in Enterprise, Unlimited, and Developer editions.

**How:** In Experience Builder, drag the Country Selector component onto a page of your store. The component applies to all pages in your store.



SEE ALSO:

[Salesforce Help: Configure Salesforce for Global Stores \(can be outdated or unavailable during release preview\)](#)

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

## Streamline Checkout for Mobile Customers

Make it easier for your mobile customers to complete their purchases. On the Cart page in your store, place the Checkout Button component inside the new Sticky Container component. Components in the Sticky Container remain on the page as customers scroll.

**Where:** This change applies to B2B Commerce and D2C Commerce in Enterprise, Unlimited, and Developer editions.

SEE ALSO:

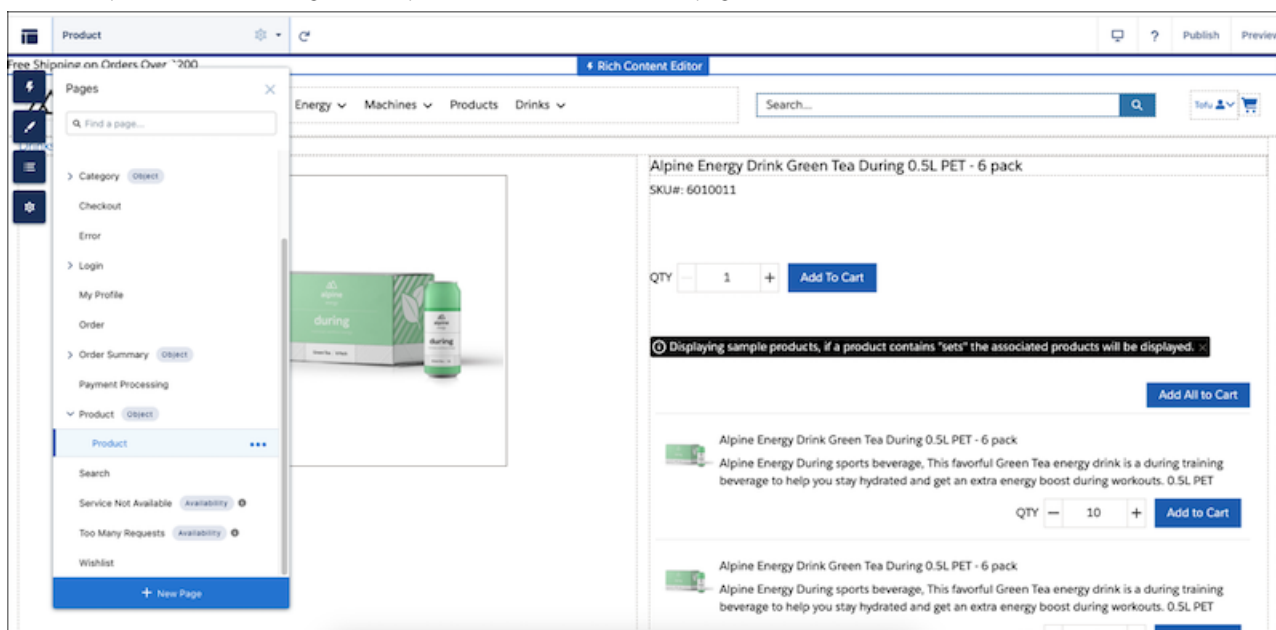
[Salesforce Help: LWR Store Components \(can be outdated or unavailable during release preview\)](#)

## Design Product Pages with Ease Using Components

Customize your product detail pages with manageable product components now included in the B2C store template. The components align with those available on the B2B template. The Product Set component is also available on the LWR template for B2B stores.

**Where:** This change applies to B2B Commerce and D2C Commerce in Enterprise, Unlimited, and Developer editions.

**How:** In Experience Builder, drag the component onto a Product Detail page.



SEE ALSO:

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

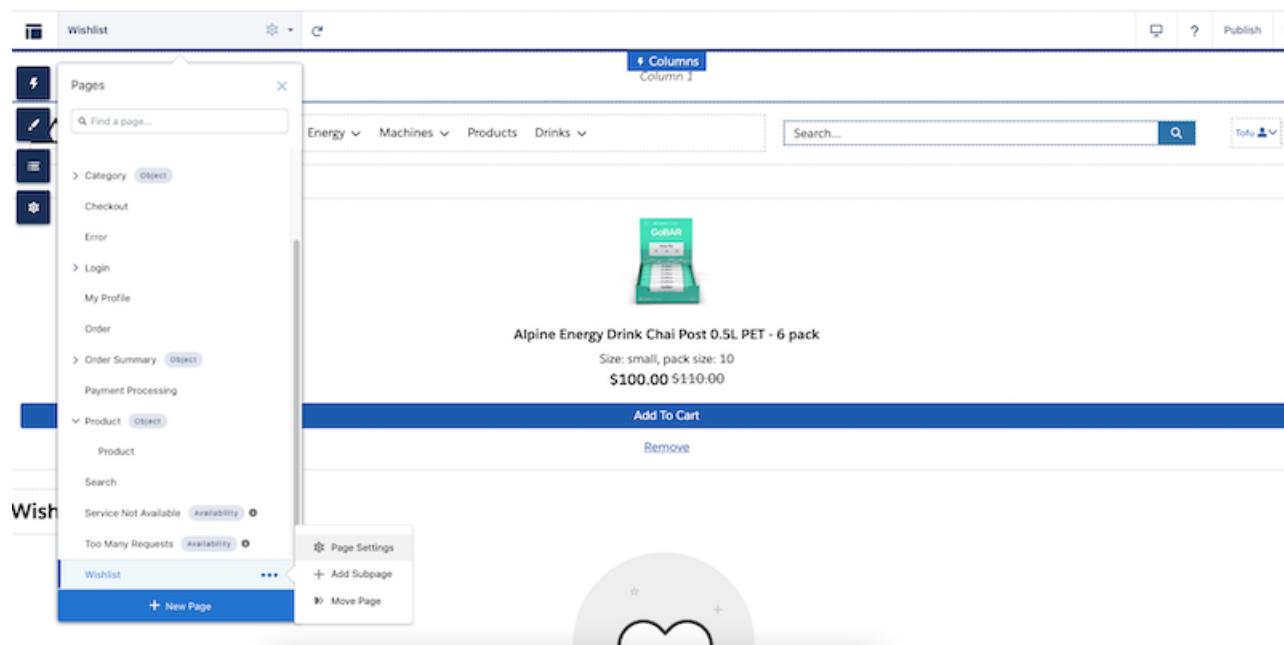
[Salesforce Help: Products \(can be outdated or unavailable during release preview\)](#)

## Improve Customer Experience with a Wishlist

Improve the customer shopping experience by adding a Wishlist to your storefront. Customers can add items to their wishlist from the product detail page. They can access the Wishlist page by clicking the heart icon in the header or through the My Account menu. From the Wishlist page, they can remove items or add them to their cart.

**Where:** This change applies to B2B Commerce and D2C Commerce in Enterprise, Unlimited, and Developer editions.

**How:** In Experience Builder, go to the Wishlist page and customize the Wishlist and Wishlist Product components.



SEE ALSO:

[Salesforce Help: LWR Store Components](#)(can be outdated or unavailable during release preview)

## Shop Faster with Quick Order

Customers no longer have to click around your store to locate products. They can now use the Quick Order component to enter SKUs and go directly to the cart. Previously, this component wasn't available in stores created with the LWR template.

**Where:** This change applies to B2B Commerce and D2C Commerce in Enterprise, Unlimited, and Developer editions.

SEE ALSO:

[Salesforce Help: LWR Store Components](#) (can be outdated or unavailable during release preview)

## Omnichannel Inventory

Track inventory reservations end to end with the new reservationId field on the Transfer, Fulfill, and Unreserve Inventory Reservation APIs. Experience the benefit of performance optimizations across the service and with initial inventory imports.

IN THIS SECTION:

### [Track Inventory Reservations End to End](#)

Get increased visibility into Omnichannel Inventory and storefront activities with the new reservationId field on the Transfer, Fulfill, and Unreserve Inventory Reservation APIs. You can use this field to track a reservation within the inventory service. The reservation ID is also incorporated into the SKU activity logs for tracking and troubleshooting.

### [Get Better Performance When Processing Inventory Records](#)

Experience the benefit of performance optimizations that enable Omnichannel Inventory to process more inventory records during the initial inventory import along with overall improvements across the service.

## Track Inventory Reservations End to End

Get increased visibility into Omnichannel Inventory and storefront activities with the new reservationId field on the Transfer, Fulfill, and Unreserve Inventory Reservation APIs. You can use this field to track a reservation within the inventory service. The reservation ID is also incorporated into the SKU activity logs for tracking and troubleshooting.

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

SEE ALSO:

[Inventory Reservation API Overview](#)

## Get Better Performance When Processing Inventory Records

Experience the benefit of performance optimizations that enable Omnichannel Inventory to process more inventory records during the initial inventory import along with overall improvements across the service.

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

SEE ALSO:

[Omnichannel Inventory Service](#)

## Salesforce Order Management

Charge fees for returns and cancellations using the updated RMA, Return Item, and Cancel Item flows. Order on behalf of a customer in B2B Commerce and D2C Commerce. Self-provision the order self-service connection. Fulfill orders quicker with pick tickets.

IN THIS SECTION:

[Charge Fees for Returns and Cancellations](#)

The updated RMA, Return Item, and Cancel Item flows now include the ability to charge fees when processing returns and cancellations.

[Self Provision Order Self-Service](#)

Create a self-service portal in your SFRA storefronts using the order self-service plug-in. Customers can use this portal to check their order status and history, manage returns, and initiate cancellations.

[Fulfill Orders Quickly with Pick Tickets](#)

Use pick tickets to pick multiple orders at the same time. Associates can filter new fulfillment orders by delivery method, select and bundle orders with similar shipping types, and track the picking of all bundled orders.

[Order on Behalf of a Customer in B2B Commerce and D2C Commerce](#)

Place B2B and D2C orders directly on behalf of customers with Order on Behalf Of. Let service agents and account managers place orders for D2C shoppers and B2B buyers.

## Charge Fees for Returns and Cancellations

The updated RMA, Return Item, and Cancel Item flows now include the ability to charge fees when processing returns and cancellations.

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

SEE ALSO:

[Charge Return and Cancel Fees](#)



## Self Provision Order Self-Service

Create a self-service portal in your SFRA storefronts using the order self-service plug-in. Customers can use this portal to check their order status and history, manage returns, and initiate cancellations.

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

SEE ALSO:

[Order Self-Service](#)

## Fulfill Orders Quickly with Pick Tickets

Use pick tickets to pick multiple orders at the same time. Associates can filter new fulfillment orders by delivery method, select and bundle orders with similar shipping types, and track the picking of all bundled orders.

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

SEE ALSO:

[Create a Pick Ticket for a Fulfillment Order](#)

## Order on Behalf of a Customer in B2B Commerce and D2C Commerce

Place B2B and D2C orders directly on behalf of customers with Order on Behalf Of. Let service agents and account managers place orders for D2C shoppers and B2B buyers.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions. Order on Behalf Of for D2C requires an OMS Growth License.

SEE ALSO:

[Place an Order on Behalf of a Customer](#)

## Salesforce Payments (Generally Available)

Salesforce Payments is now generally available on the Salesforce platform, compatible with B2B Commerce, D2C Commerce, and Salesforce Order Management. You no longer have to use the Salesforce Payments managed package, except for limited use cases, such as B2C Commerce customers who accept PayPal payments and want to issue refunds with Order Management.

IN THIS SECTION:

[Give Access to Payments Functionality Based on User Roles](#)

You can assign permission sets to individuals that align with their functional roles. There are permissions for internal admins to configure the payment experience, and permissions for authenticated external users to save and manage their payment methods. Use the permission sets as is or copy and customize them to meet your business needs.

[Easily Create Merchant Accounts for Payment Processing](#)

Get started quickly with Salesforce Payments. When you open the Payments app for the first time, you're guided through the configuration of Salesforce Payments merchant accounts so you can accept payments, and through the set up of payment method sets. Payment methods sets let you customize which payment methods are offered to customers at checkout.

### [Control Which Payment Methods Are Accepted at Checkout](#)

Group payment types, such as credit cards and digital wallets, into payment method sets to customize the payment options for your customers during checkout. Create payment method sets tailored to specific geographies to provide the right payment options for a given store location. Supported payment methods include credit cards, Apple Pay, Google Pay, SEPA Debit, Klarna, Afterpay/Clearpay, iDEAL, Bancontact, and EPS.

### [Help Customers Check Out Faster with Saved Payment Methods](#)

Reduce the time it takes customers to complete future transactions by letting them save their payment method at checkout. Customers can also self-manage their saved payment methods from their My Account page for a store.

### [Give Merchants a Single Place to View Payment Information](#)

Now merchants can view the details of a payment in one place. The Payments Workspace provides a quick snapshot of each processed payment, including the status, amount, payment method, and customer name. You can filter the workspace list view by payment status in the left panel.

### [Issue Refunds for Multi-Capture Payments \(Beta\)](#)

Issue a refund on a partially captured payment before the payment authorization is complete when you use Salesforce Payments with Salesforce Order Management or a custom integration using the Salesforce Payments APIs. For example, a customer purchases several items with different shipping times, and a partial payment is captured when an item ships. You can issue a refund on the captured payment while the other items are being processed. After the refund is complete, you can continue to capture payments as long as the authorization is still open.

### [Embed Payment Solutions in Your Apps with Pay Now](#)

Create payment links that direct customers to branded payment pages on all devices, and associate each link with a record in a Salesforce app of your choice.

## Give Access to Payments Functionality Based on User Roles

You can assign permission sets to individuals that align with their functional roles. There are permissions for internal admins to configure the payment experience, and permissions for authenticated external users to save and manage their payment methods. Use the permission sets as is or copy and customize them to meet your business needs.

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


**How:** In Setup, in the Quick Find box, enter *Permission Sets*. Assign the Payments Administrator and the Authenticated Payer permission sets to the appropriate individuals.

**Permission Sets** Help for this Page ?

On this page you can create, view, and manage permission sets.

In addition, you can use the SalesforceA mobile app to assign permission sets to a user. Download SalesforceA from the App Store or Google Play: [iOS](#) | [Android](#)

**All** ▾ [Edit](#) | [Delete](#) | [Create New View](#)

[New](#)  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**

<input type="checkbox"/>	Action	Permission Set Label +	Description	License
<input type="checkbox"/>	<a href="#">Clone</a>	<a href="#">Authenticated Payer</a>	An authenticated external user with the ability to make and ...	Salesforce Payments External User
<input type="checkbox"/>	<a href="#">Clone</a>	<a href="#">Buyer</a>	Allows access to the store. Lets users see products and cat...	B2B Buyer Permission Sets License Se
<input type="checkbox"/>	<a href="#">Clone</a>	<a href="#">Buyer Manager</a>	Includes all Buyer capabilities, and allows access to manag...	B2B Buyer Manager Permission Sets L
<input type="checkbox"/>	<a href="#">Clone</a>	<a href="#">Commerce Admin</a>	Allow access to commerce admin features.	Commerce Admin Permission Set Licer
<input type="checkbox"/>	<a href="#">Clone</a>	<a href="#">Merchandiser</a>	Allow access to commerce merchandising features.	Commerce Merchandiser User Permiss
<input type="checkbox"/>	<a href="#">Clone</a>	<a href="#">Order Management 1Commerce User</a>	Allows users access to the Order Management 1Commerce...	1Commerce Order Management User
<input type="checkbox"/>	<a href="#">Clone</a>	<a href="#">Payments Administrator</a>	Has all the user permissions to gate access to APIs that ...	Salesforce Payments Internal User

SEE ALSO:

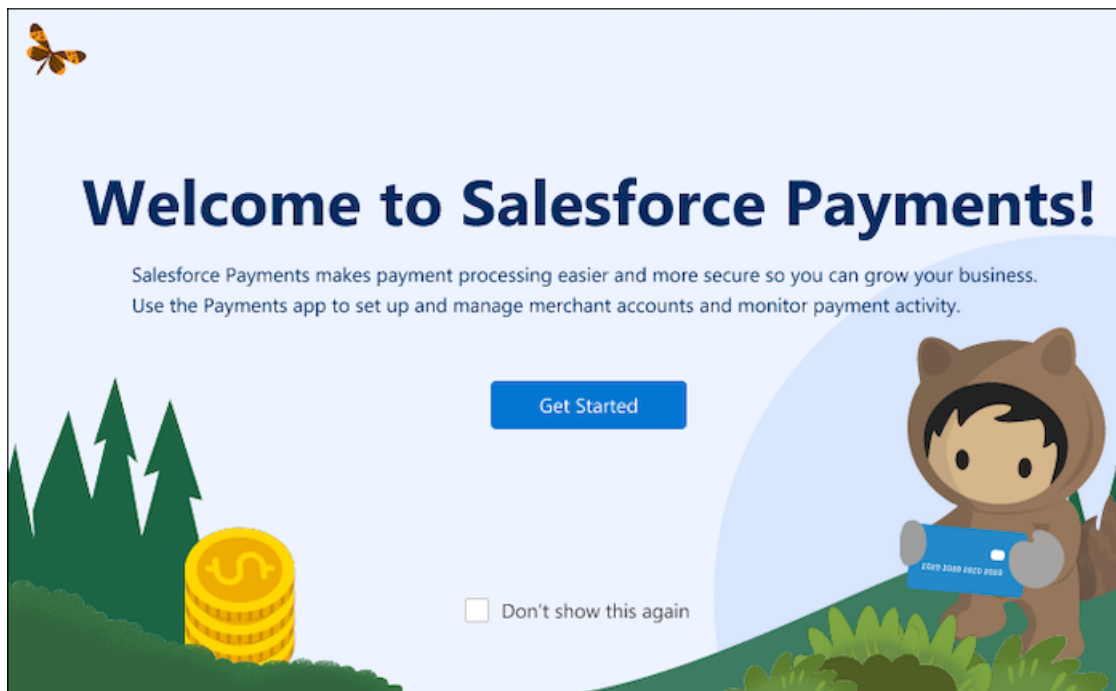
[Salesforce Help: Payments Personas and Permissions \(can be outdated or unavailable during release preview\)](#)

## Easily Create Merchant Accounts for Payment Processing

Get started quickly with Salesforce Payments. When you open the Payments app for the first time, you're guided through the configuration of Salesforce Payments merchant accounts so you can accept payments, and through the set up of payment method sets. Payment methods sets let you customize which payment methods are offered to customers at checkout.

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

**How:** Select Payments from the App Launcher.



SEE ALSO:

[Salesforce Help: Set Up Merchant Accounts to Accept Payments \(can be outdated or unavailable during release preview\)](#)

## Control Which Payment Methods Are Accepted at Checkout

Group payment types, such as credit cards and digital wallets, into payment method sets to customize the payment options for your customers during checkout. Create payment method sets tailored to specific geographies to provide the right payment options for a given store location. Supported payment methods include credit cards, Apple Pay, Google Pay, SEPA Debit, Klarna, Afterpay/Clearpay, iDEAL, Bancontact, and EPS.

**Where:** This change applies to Lightning Experience and all versions of the Salesforce mobile app in Enterprise, Unlimited, and Developer editions.

**How:** Add a payment method set when onboarding a merchant account or from the payment method set related list in a merchant account record. From Experience Builder, associate your payment method set to your store.

**Create Payment Method Set**

\* Payment Method Set Key ⓘ  
AMER-US

**Payment Methods** ⓘ

Available Payment Methods

- Afterpay/Clearpay
- Bancontact
- EPS
- iDEAL
- Klarna
- SEPA Debit

Selected Payment Methods (in order)

- Apple Pay
- Credit Cards
- Google Pay

Some payment methods require additional setup. [Learn more.](#)

[Cancel](#) [Create](#)

SEE ALSO:

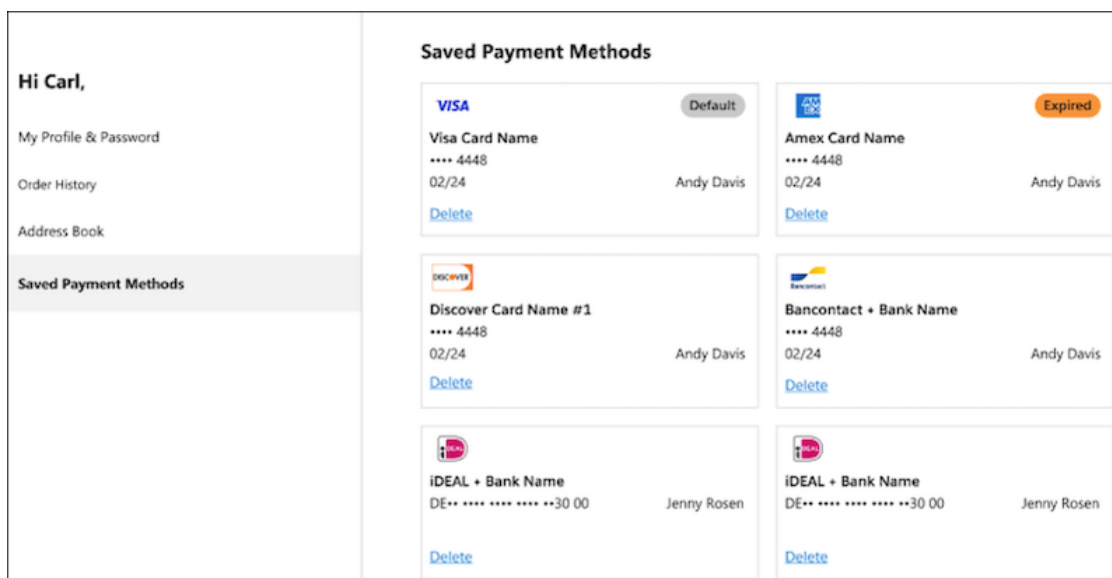
[Salesforce Help: Customize Which Payment Methods Your Store Offers at Checkout](#) (can be outdated or unavailable during release preview)

## Help Customers Check Out Faster with Saved Payment Methods

Reduce the time it takes customers to complete future transactions by letting them save their payment method at checkout. Customers can also self-manage their saved payment methods from their My Account page for a store.

**Where:** This change applies to Lightning Experience and all versions of the Salesforce mobile app in Enterprise, Unlimited, and Developer editions.

**How:** In Experience Builder, go to the Checkout page. Replace the default Payment component with Salesforce Payments component, and enable saved payments. Next, select and customize the Saved Payment Methods page, and add this page to the Navigation List Menu.



SEE ALSO:

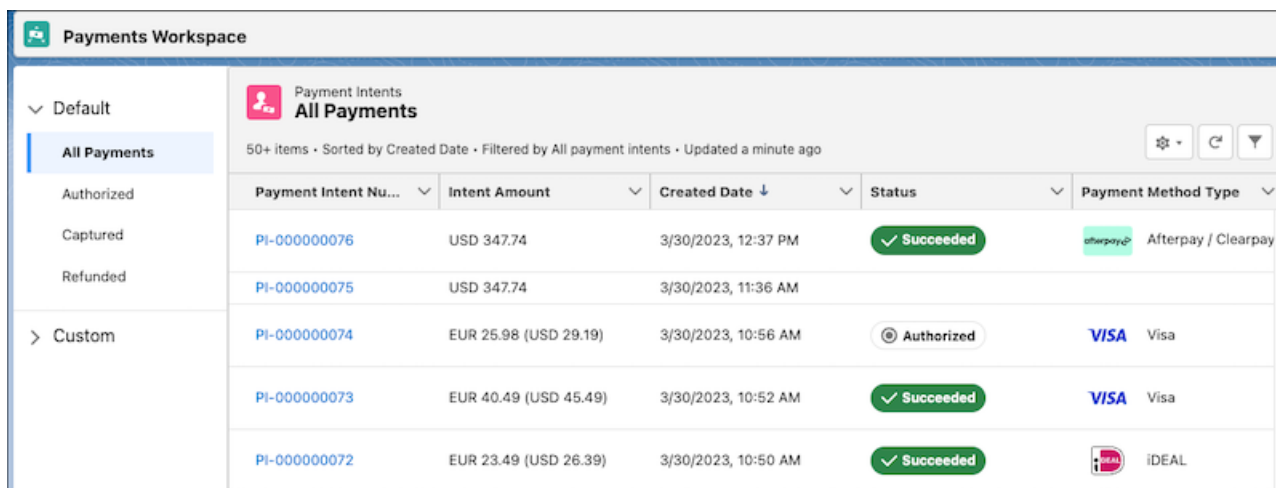
[Salesforce Help: Give Customers the Option to Save Their Payment Methods](#) (can be outdated or unavailable during release preview)

## Give Merchants a Single Place to View Payment Information

Now merchants can view the details of a payment in one place. The Payments Workspace provides a quick snapshot of each processed payment, including the status, amount, payment method, and customer name. You can filter the workspace list view by payment status in the left panel.

**Where:** This change applies to Lightning Experience and all versions of the Salesforce mobile app in Enterprise, Unlimited, and Developer editions.

**How:** From the Payments app, select **Payments Workspace**.



SEE ALSO:

[Salesforce Help: Monitor Payment Requests from the Payments Workspace](#) (can be outdated or unavailable during release preview)

## Issue Refunds for Multi-Capture Payments (Beta)

Issue a refund on a partially captured payment before the payment authorization is complete when you use Salesforce Payments with Salesforce Order Management or a custom integration using the Salesforce Payments APIs. For example, a customer purchases several items with different shipping times, and a partial payment is captured when an item ships. You can issue a refund on the captured payment while the other items are being processed. After the refund is complete, you can continue to capture payments as long as the authorization is still open.

**Where:** This change applies to Lightning Experience and all versions of the Salesforce mobile app 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](#).

SEE ALSO:

[Salesforce Payments](#)

## Embed Payment Solutions in Your Apps with Pay Now

Create payment links that direct customers to branded payment pages on all devices, and associate each link with a record in a Salesforce app of your choice.

**Where:** This change applies to B2B Commerce and D2C Commerce in Enterprise, Unlimited, and Developer and Starter editions.

SEE ALSO:

[Embed Pay Now on Different Salesforce Apps](#)

## Customization

---

Use the new Salesforce Connect adapter for GraphQL to connect external sources that expose their capabilities via GraphQL. Assign field-level security for permission sets instead of profiles.

IN THIS SECTION:

[Salesforce Connect](#)

Connect Salesforce to external data sources managed via GraphQL (generally available). Access data that's exposed via OData version 4.01 using the Salesforce Connect OData Adapter.

[Permissions](#)

Setting field-level security on permission sets instead of profiles is generally available, making it easier to follow the best practice of using permission sets for managing your users' permissions. Delegated administrators can manage the assignment of permission set groups.

[Lightning App Builder](#)

Improve your users' experience on Dynamic Forms-enabled pages with Dynamic Forms on Mobile (beta) and a new Field Section component setting. Organize your Lightning app pages more efficiently with Tabs and Accordion components.

[Globalization](#)

Stay up to date with ICU locale formats and the latest Custom Address Field functionality. Review the updated available country list and label translations. Prepare for a new style for Japanese katakana. Adopt new currencies for Croatia and Sierra Leone.

### External Services

Get a smoother pathway to register MuleSoft APIs, and make easier edits to HTTP Callout.

### Fields

Improve org health with limits on inactive picklist values. Streamline your workflow by managing Salutation picklist values in Lightning Experience. And refer to your nonbinary customers with the default Mx. Salutation picklist value.

### General Setup

Create custom Lightning apps using the new Clone action. Install Data Loader on different operating systems using only one zip file. Get better performance on cases and contacts with enhancements to automatic account sharing recalculation.

## Salesforce Connect

Connect Salesforce to external data sources managed via GraphQL (generally available). Access data that's exposed via OData version 4.01 using the Salesforce Connect OData Adapter.

### IN THIS SECTION:

#### [Connect External Data Sources Managed via GraphQL from Salesforce \(Generally Available\)](#)

Use the new Salesforce Connect adapter for GraphQL to access and integrate data from external sources that expose their capabilities via GraphQL. GraphQL APIs are more flexible and efficient than traditional REST APIs and provide a modern way to integrate applications. Perform queries, execute mutations, such as insert, update, and delete, and manage metadata to configure external objects easily. The new adapter also includes special extensions for AWS AppSync and provides seamless access to Amazon RDS.

#### [Get OData Version 4.01 Support for Salesforce Connect OData Adapter](#)

Use named credentials to authenticate and securely connect to data that's exposed via the Open Data Protocol 4.01. This integration allows you to process data efficiently and take advantage of the external system capabilities. The callouts to OData data sources are no longer restricted in number. Send multiple DML transactions in a single batch request in JSON batch format. Improve performance by using the minimal metadata header option and reduce data requested from server to client.

## Connect External Data Sources Managed via GraphQL from Salesforce (Generally Available)

Use the new Salesforce Connect adapter for GraphQL to access and integrate data from external sources that expose their capabilities via GraphQL. GraphQL APIs are more flexible and efficient than traditional REST APIs and provide a modern way to integrate applications. Perform queries, execute mutations, such as insert, update, and delete, and manage metadata to configure external objects easily. The new adapter also includes special extensions for AWS AppSync and provides seamless access to Amazon RDS.

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

**How:** Work with your Amazon administrator to use the setup template and configure AWS AppSync. Define an external data source of type `GraphQL` and connect Salesforce to access AWS data stores, without copying or syncing the data.

### SEE ALSO:

[Salesforce Help: Access External Data with the Salesforce Connect Adapter for GraphQL \(can be outdated or unavailable during release preview\)](#)



## Get OData Version 4.01 Support for Salesforce Connect OData Adapter

Use named credentials to authenticate and securely connect to data that's exposed via the Open Data Protocol 4.01. This integration allows you to process data efficiently and take advantage of the external system capabilities. The callouts to OData data sources are no longer restricted in number. Send multiple DML transactions in a single batch request in JSON batch format. Improve performance by using the minimal metadata header option and reduce data requested from server to client.

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

### SEE ALSO:

[Salesforce Help: Access External Data with the OData Adapter for Salesforce Connect \(can be outdated or unavailable during release preview\)](#)

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

## Permissions

Setting field-level security on permission sets instead of profiles is generally available, making it easier to follow the best practice of using permission sets for managing your users' permissions. Delegated administrators can manage the assignment of permission set groups.

### IN THIS SECTION:

#### [Set Field-Level Security for a Field on Permission Sets Instead of Profiles \(Generally Available\)](#)

When you create a field, set its field-level security on permission sets instead of profiles. Or, modify the field-level security for an existing field for all permission sets in Object Manager. This change makes it easier to follow the user access control best practice of using permission sets to manage your users' permissions rather than profiles. This feature, now generally available, includes an enhancement so that you can see each permission set's object permissions for the field's object without leaving the page.

#### [Allow Delegated Admins to Manage Permission Set Group Assignments](#)

Delegated administrators can now manage the assignment of permission set groups for users in their delegated group, giving you more time for other admin tasks.

#### [See More Information in Reports from the User Access and Permissions Assistant](#)

Reports on users' assigned permissions contain more details, such as the users' titles, profiles, and whether they're active. You can filter on some user attributes to report on a subset of users. It's now easier to select the user, object, and field permissions that you're reporting on. We also improved performance for these reports in Salesforce orgs with a large number of users.

#### [Learn About Data Visibility and Access with Updated Who Sees What Videos](#)

Set up your object, record, and field access to make sure that your users get access only to the data that they need—and no more. The refreshed Who Sees What video series reflects the latest best practices and incorporates more features, including permission set groups and restriction rules.

#### [Automate and Migrate User Access with User Access Policies \(Beta\)](#)

Automate your users' assignments to managed package licenses, permission sets, and other access mechanisms based on criteria that you set. Create user access policies that automatically grant or remove access whenever users are created or updated. Or, easily migrate large sets of users to a new access setup in a single operation. Previously, Salesforce enabled user access policies, but you can now enable this beta feature on the User Management Settings Setup page. Also since the last release, you can now set more complex user criteria and monitor recent user access changes.

## Set Field-Level Security for a Field on Permission Sets Instead of Profiles (Generally Available)

When you create a field, set its field-level security on permission sets instead of profiles. Or, modify the field-level security for an existing field for all permission sets in Object Manager. This change makes it easier to follow the user access control best practice of using permission sets to manage your users' permissions rather than profiles. This feature, now generally available, includes an enhancement so that you can see each permission set's object permissions for the field's object without leaving the page.

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

**How:** From Setup, in the Quick Find box, enter *User Management Settings*, and then select **User Management Settings**. Enable **Field-Level Security for Permission Sets During Field Creation**. Now, when you create a field, set field-level security on an existing field, or change a custom field's type, you assign field-level security for permission sets instead of profiles.

SEE ALSO:

[IdeaExchange: Add New Custom Field to Permission Sets instead of Just Profiles](#)

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

[Salesforce Help: Set Field-Level Security for a Field on All Permission Sets \(can be outdated or unavailable during release preview\)](#)

## Allow Delegated Admins to Manage Permission Set Group Assignments

Delegated administrators can now manage the assignment of permission set groups for users in their delegated group, giving you more time for other admin tasks.

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

**How:** From Delegated Administration in Setup, create or select a delegated group. Then in Assignable Permission Set Groups, select the permission set groups that delegated admins can assign to users or remove. Delegated administrators can manage assignments for the permission set groups in their delegated group, but they can't modify those permission set groups.

SEE ALSO:

[IdeaExchange: Allow Delegated Administration for Permission Set Groups](#)

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

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

## See More Information in Reports from the User Access and Permissions Assistant

Reports on users' assigned permissions contain more details, such as the users' titles, profiles, and whether they're active. You can filter on some user attributes to report on a subset of users. It's now easier to select the user, object, and field permissions that you're reporting on. We also improved performance for these reports in Salesforce orgs with a large number of users.

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

**How:** To use this feature, download the app from AppExchange.

SEE ALSO:

[AppExchange: User Access and Permissions Assistant](#)

[Salesforce Help: User Access and Permissions Assistant \(can be outdated or unavailable during release preview\)](#)

## Learn About Data Visibility and Access with Updated Who Sees What Videos

Set up your object, record, and field access to make sure that your users get access only to the data that they need—and no more. The refreshed Who Sees What video series reflects the latest best practices and incorporates more features, including permission set groups and restriction rules.

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

SEE ALSO:

[Video: Who Sees What Series: Lightning Experience](#)

## Automate and Migrate User Access with User Access Policies (Beta)

Automate your users' assignments to managed package licenses, permission sets, and other access mechanisms based on criteria that you set. Create user access policies that automatically grant or remove access whenever users are created or updated. Or, easily migrate large sets of users to a new access setup in a single operation. Previously, Salesforce enabled user access policies, but you can now enable this beta feature on the User Management Settings Setup page. Also since the last release, you can now set more complex user criteria and monitor recent user access changes.

**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](#).

**How:** From Setup, in the Quick Find box, enter *User Management Settings*, and then select **User Management Settings**. Enable **User Access Policies (Beta)**. Then, in the Quick Find box, enter *User Access Policies*, and then select **User Access Policies** to create or manage your user access policies.

If Salesforce enabled user access policies for you before the Summer '23 release, you must enable this feature again on the User Management Settings page.

SEE ALSO:

[Salesforce Help: User Access Policies \(Beta\) \(can be outdated or unavailable during release preview\)](#)

## Lightning App Builder

Improve your users' experience on Dynamic Forms-enabled pages with Dynamic Forms on Mobile (beta) and a new Field Section component setting. Organize your Lightning app pages more efficiently with Tabs and Accordion components.

IN THIS SECTION:

[Give Your Mobile Users the Dynamic Forms Experience \(Beta\)](#)

With Dynamic Forms, you can add and remove fields individually from a Lightning record page, break up record details into multiple sections, and set conditional visibility rules for fields and field sections, all in Lightning App Builder. Previously, Dynamic Forms was available only on desktop. Now, with Dynamic Forms on Mobile (beta), your mobile users can have the same customized experience that your desktop users have. Dynamic Forms on Mobile (beta) is supported on accounts, cases, contacts, leads, opportunities, and custom objects.

### Align Fields Horizontally in Field Sections

Control field alignment across columns by using a new property on Dynamic Forms Field Section components. The Align fields horizontally property prevents fields in multicolumn Field Sections from collapsing upward when there's a gap due to differences in field heights. Fields remain horizontally aligned with their neighbors in the same row. But even with this property selected, if a field is hidden because of visibility rules, the fields in its column still collapse upward to fill the empty space.

### Optimize Your App Pages with the Accordion and Tabs Components

Make your Lightning pages more organized and effective with the Accordion and Tabs components, now supported on app pages. The Accordion and Tabs components are container components that you can drop other components into to better organize your pages and improve page performance. Open an app page in the Lightning App Builder, and drag an Accordion or Tabs component onto the canvas. Put other components inside the accordion or tab sections. You can customize the labels of each tab and accordion section to whatever you want.

### Other Improvements to UI Text in Lightning App Builder

To improve usability of some components and bring older labels into compliance with our UI text guidelines, several labels in the Lightning App Builder are new or renamed.

### Create Accounts More Easily with Dynamic Forms

Dynamic Forms now supports Automated Account Fields. Previously, if you had the Automated Account Fields account setting enabled, the Account create and edit windows used record details from the page layout.

## Give Your Mobile Users the Dynamic Forms Experience (Beta)

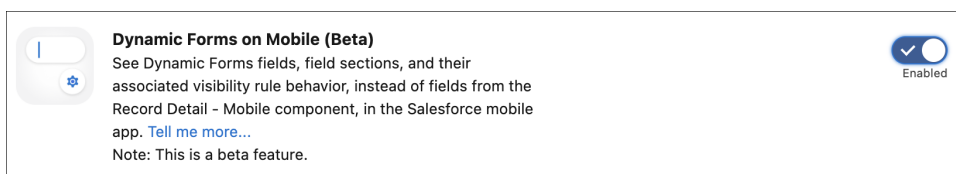
With Dynamic Forms, you can add and remove fields individually from a Lightning record page, break up record details into multiple sections, and set conditional visibility rules for fields and field sections, all in Lightning App Builder. Previously, Dynamic Forms was available only on desktop. Now, with Dynamic Forms on Mobile (beta), your mobile users can have the same customized experience that your desktop users have. Dynamic Forms on Mobile (beta) is supported on accounts, cases, contacts, leads, opportunities, and custom objects.

**Where:** This change applies to Lightning Experience in Group, 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 Salesforce Mobile App Setup, enable **Dynamic Forms on Mobile (Beta)**.



If you add dynamic forms to a Lightning record page and that page includes a Record Detail - Mobile component, your users see only the Record Detail - Mobile component from their mobile device, even after you enable Dynamic Forms on Mobile Beta. So that your users can view Dynamic Forms on Mobile content on pages that you upgrade to Dynamic Forms, remove the Record Detail - Mobile component from the page. New tips in Lightning App Builder remind you to opt in to the beta feature and to remove your Record Detail - Mobile components.

After you enable Dynamic Forms on Mobile (beta), Lightning record pages that you upgrade to Dynamic Forms show Dynamic Forms on their mobile devices without configuration.

SEE ALSO:

[Salesforce Help: Break Up Your Record Details with Dynamic Forms \(can be outdated or unavailable during release preview\)](#)

## Align Fields Horizontally in Field Sections

Control field alignment across columns by using a new property on Dynamic Forms Field Section components. The Align fields horizontally property prevents fields in multicolumn Field Sections from collapsing upward when there's a gap due to differences in field heights. Fields remain horizontally aligned with their neighbors in the same row. But even with this property selected, if a field is hidden because of visibility rules, the fields in its column still collapse upward to fill the empty space.

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

**How:** To see the new property, click a Field Section component on a Dynamic Forms-enabled page in Lightning App Builder.

Page > Field Section

Label ⓘ

Opportunity Information

Columns

☐ 1 Column

☒ 2 Columns

☒ Align fields horizontally ⓘ

For example, these two versions of the same field section contain account fields. The left image shows the behavior without the new property selected. On the right, the horizontal alignment setting was selected, causing the Website field to stay aligned horizontally with Account Name instead of collapsing upward.

Account Information

Account Owner Madison Rigsby	Rating Hot
Billing Address 312 Constitution Place Austin, TX 78767 USA Austin, TX	Phone (512) 757-6000
Account Name Edge Communications	Website http://edgecomm.com
Parent Account	Ownership Public
Account Number CD451796	Type Customer - Direct
Account Site	Industry Electronics
Annual Revenue \$139,000,000	

Account Information

Account Owner Madison Rigsby	Rating Hot
Billing Address 312 Constitution Place Austin, TX 78767 USA Austin, TX	Phone (512) 757-6000
Account Name Edge Communications	Website http://edgecomm.com
Parent Account	Ownership Public
Account Number CD451796	Type Customer - Direct
Account Site	Industry Electronics
Annual Revenue \$139,000,000	

SEE ALSO:

[Salesforce Help: Break Up Your Record Details with Dynamic Forms](#) (can be outdated or unavailable during release preview)

## Optimize Your App Pages with the Accordion and Tabs Components

Make your Lightning pages more organized and effective with the Accordion and Tabs components, now supported on app pages. The Accordion and Tabs components are container components that you can drop other components into to better organize your pages and improve page performance. Open an app page in the Lightning App Builder, and drag an Accordion or Tabs component onto the canvas. Put other components inside the accordion or tab sections. You can customize the labels of each tab and accordion section to whatever you want.

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

SEE ALSO:

[Salesforce Help: Add and Customize Tabs on Lightning Pages Using the Lightning App Builder \(can be outdated or unavailable during release preview\)](#)

## Other Improvements to UI Text in Lightning App Builder

To improve usability of some components and bring older labels into compliance with our UI text guidelines, several labels in the Lightning App Builder are new or renamed.

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

**Why:** Label changes appear in various places in the Lightning App Builder.

- In the Lightning page creation wizard, the completion button in the last window is now labeled Done instead of Finish.
- When viewing the properties of a Lightning page, the Developer Name field is now API Name.
- Clearer labels in the Highlights Panel component help you configure dynamic actions more easily. Now when you search for an action to add, custom detail page buttons are grouped under Custom Buttons instead of Custom Actions to differentiate action types.
- A new infobubble in the Related List - Single and Related Lists components clarifies when you can show and hide the list view action bar.

## Create Accounts More Easily with Dynamic Forms

Dynamic Forms now supports Automated Account Fields. Previously, if you had the Automated Account Fields account setting enabled, the Account create and edit windows used record details from the page layout.

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

SEE ALSO:

[Salesforce Help: Enable Automated Account Fields](#)

## Globalization

Stay up to date with ICU locale formats and the latest Custom Address Field functionality. Review the updated available country list and label translations. Prepare for a new style for Japanese katakana. Adopt new currencies for Croatia and Sierra Leone.

## IN THIS SECTION:

[Enable ICU Locale Formats \(Release Update\)](#)

To conduct business wherever you are, adopt the International Components for Unicode (ICU) locale formats. Locales control the formats for dates, times, currencies, addresses, names, and numeric values. ICU sets the international standard for these formats. The ICU locale formats provide a consistent experience across the platform and improve integration with ICU-compliant applications across the globe. When you enable this update, the ICU locale formats replace Oracle's JDK locale formats in Salesforce. This update was first made available in Winter '20 and is enforced in Spring '24.

[Explore More Custom Address Field Functionality](#)

Custom Address Field supports community profiles, Export Backup Data from Salesforce, Lightning App Builder, and SFDX CLI. Mass Update Address isn't applicable to Custom Address Fields.

[Available Country List Is Changed](#)

In accordance with the Salesforce Export Compliance policy, changes were made to the available country, time zone, and currency configurations.

[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, Bulgarian, Chinese (Simplified), Chinese (Traditional), Croatian, Czech, Danish, Dutch, English (UK), Finnish, French, German, Greek, Hebrew, Hungarian, Indonesian, Italian, Japanese, Korean, Norwegian, Polish, Portuguese (Brazil), Portuguese (European), Romanian, Russian, Slovak, Slovenian, Spanish, Spanish (Mexico), Swedish, Thai, Turkish, Ukrainian, and Vietnamese.

[Prepare for the Japanese Katakana Style Change \(Release Update\)](#)

To improve the Japanese katakana translation for foreign language words, the current Japanese Industrial Standards (JIS) style will be replaced with the 1991 Cabinet Notification Directive style in Winter '24.

[Adopt New Currencies for Croatia and Sierra Leone](#)

Effective January 1, 2023, Croatia joined 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 changed 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.

[Prepare for Locale Format Changes](#)

Stay up to date with the latest locale changes to the start day of the week if you use the International Components for Unicode (ICU) formats. Evaluate the changes that affect you for the locales that you use. Then test your filters, code, and components as needed.

[Replace Inactive Euro Locales](#)

We inactivated duplicate locales for several countries that use the euro, including Finland, France, Germany, Ireland, and Spain. Separate currency-specific locale codes are no longer needed because these countries replaced historical currencies with the Euro in 2002. To ensure that your locales stay up to date with new releases, replace the inactive EURO locales with active locale codes.

[Reduce Base Package Size with Language Extension Packages \(Beta\)](#)

Reduce the size of base packages that include translations in multiple languages by including the translations in language extension packages. Language extension packages can now contain the translations for translation components in base packages.

## 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 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](#)

## Explore More Custom Address Field Functionality

Custom Address Field supports community profiles, Export Backup Data from Salesforce, Lightning App Builder, and SFDX CLI. Mass Update Address isn't applicable to Custom Address Fields.

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

SEE ALSO:

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

## Available Country List Is Changed

In accordance with the Salesforce Export Compliance policy, changes were made to the available country, time zone, and currency configurations.

**Where:** This change applies to Lightning Experience, Salesforce Classic, and all versions of the Salesforce 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 \(can be outdated or unavailable during release preview\)](#)

## 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, Bulgarian, Chinese (Simplified), Chinese (Traditional), Croatian, Czech, Danish, Dutch, English (UK), Finnish, French, German, Greek, Hebrew, Hungarian, Indonesian, Italian, Japanese, Korean, Norwegian, Polish, Portuguese (Brazil), Portuguese (European), Romanian, Russian, Slovak, Slovenian, Spanish, Spanish (Mexico), Swedish, Thai, Turkish, Ukrainian, and Vietnamese.

**Where:** This change applies to Lightning Experience, Salesforce Classic, and all versions of the Salesforce mobile app in all editions.



**How:** To review the changes, see [Summer '23 Translated Terminology Updates](#) and download the list of changes. If you want to use a different translation for a tab or field label, you can change the name.

SEE ALSO:

[Salesforce Help: Rename Object, Tab, and Field Labels \(can be outdated or unavailable during release preview\)](#)

## Prepare for the Japanese Katakana Style Change (Release Update)

To improve the Japanese katakana translation for foreign language words, the current Japanese Industrial Standards (JIS) style will be replaced with the 1991 Cabinet Notification Directive style in Winter '24.

**Where:** This change applies to Lightning Experience, Salesforce Classic, and all versions of the Salesforce mobile app in all editions. Product documentation will be 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 joined 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 changed 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](#)

## Prepare for Locale Format Changes

Stay up to date with the latest locale changes to the start day of the week if you use the International Components for Unicode (ICU) formats. 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 mobile app in all editions.

SEE ALSO:

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

[Knowledge Article: Identify Changes to the Start Day of the Week in Summer '23 for ICU Locales](#)

[Knowledge Article: Identify Updated Start of Week Across Locales using JDK formats](#)

## Replace Inactive Euro Locales

We inactivated duplicate locales for several countries that use the euro, including Finland, France, Germany, Ireland, and Spain. Separate currency-specific locale codes are no longer needed because these countries replaced historical currencies with the Euro in 2002. To ensure that your locales stay up to date with new releases, replace the inactive EURO locales with active locale codes.

**Where:** This change applies to Lightning Experience, Salesforce Classic, and all versions of the Salesforce mobile app in all editions.

**Why:** Standard locale codes are in the format `xx_YY` where `xx` is the language code, and `YY` is the country code. Salesforce created an additional set of locale codes in the format `xx_YY_EURO` to differentiate between the historical currency and the Euro. Because both the `xx_YY_EURO` and `xx_YY` locale codes now correctly identify the currency as the Euro, the duplicate `xx_YY_EURO` locale codes are inactive.

If you use one of these locales and the `AllowInactiveLocales` permission is set for your org, the inactive locale continues to appear in your picklists and you can continue to use the inactive locale. If `AllowInactiveLocales` isn't set for your org, you see an exception.

If you already use the standard `xx_YY` locale code, this change has no impact on your org.

INACTIVE LOCALE NAME AND CODE	ACTIVE LOCALE NAME AND CODE
Català (Espanya, EURO) ca_ES_EURO	Català (Espanya) ca_ES
Deutsch (Österreich, EURO) de_AT_EURO	Deutsch (Österreich) de_AT
Deutsch (Deutschland, EURO) de_DE_EURO	Deutsch (Deutschland) de_DE
Deutsch (Luxemburg, EURO) de_LU_EURO	Deutsch (Luxemburg) de_LU
English (Ireland, EURO) en_IE_EURO	English (Ireland) en_IE
Español (España, EURO) es_ES_EURO	Español (España) es_ES
Suomi (Suomi, EURO) fi_FI_EURO	Suomi (Suomi) fi_FI

INACTIVE LOCALE NAME AND CODE	ACTIVE LOCALE NAME AND CODE
Français (France, EURO) fr_FR_EURO	Français (France) fr_FR

## SEE ALSO:

[Salesforce Help: Supported Date and Time Formats \(ICU\) \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Supported Date and Time Formats \(JDK\) \(can be outdated or unavailable during release preview\)](#)

## Reduce Base Package Size with Language Extension Packages (Beta)

Reduce the size of base packages that include translations in multiple languages by including the translations in language extension packages. Language extension packages can now contain the translations for translation components in base packages.

**Where:** This change applies to unlocked and first- and second-generation managed packages with translations.



**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 Release Notes: Include Translations in Extension Packages for Base Package Components \(Beta\) \(can be outdated or unavailable during release preview\)](#)

## External Services

Get a smoother pathway to register MuleSoft APIs, and make easier edits to HTTP Callout.

## IN THIS SECTION:

### [Declaratively Edit External Services Created by HTTP Callout](#)

With the general availability of Flow Builder HTTP Callout in Summer '23, you can now declaratively edit external services that were originally created by HTTP Callout. Editing an external service is similar to the existing Modify behavior, except that you can change only the description and named credentials. To edit an operation, go to the external service's Details page and select Edit HTTP Action.

### [MuleSoft Registration Review Page Has Changed](#)

When you want to review a MuleSoft API registration, you're rerouted to the new MuleSoft Services page in Setup. Previously, you reviewed MuleSoft registrations within External Services.

### [Enjoy More Screen Real Estate](#)

The External Services registration UI is now a full screen experience, making it easier to review the schema.

### [Call a MuleSoft Invocable Action from an Orchestration](#)

Call a MuleSoft action (an external service) from a step in your orchestration.

## Declaratively Edit External Services Created by HTTP Callout

With the general availability of Flow Builder HTTP Callout in Summer '23, you can now declaratively edit external services that were originally created by HTTP Callout. Editing an external service is similar to the existing Modify behavior, except that you can change only the description and named credentials. To edit an operation, go to the external service's Details page and select Edit HTTP Action.

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

SEE ALSO:

[Bring External Data into Flow Builder Without Code \(Generally Available\)](#)

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

## MuleSoft Registration Review Page Has Changed

When you want to review a MuleSoft API registration, you're rerouted to the new MuleSoft Services page in Setup. Previously, you reviewed MuleSoft registrations within External Services.

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

SEE ALSO:

[Import REST APIs Directly from MuleSoft Services](#)

[Salesforce Help: Make a MuleSoft RPA Process Available to Flows \(can be outdated or unavailable during release preview\)](#)

## Enjoy More Screen Real Estate

The External Services registration UI is now a full screen experience, making it easier to review the schema.

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

**How:** More real estate improves usability.

**SETUP > EXTERNAL SERVICES**  
**Add an External Service**

**Provide Registration Details**

- External Service Name**: creditService3
- Description**: Enter a description...
- Service Schema**: Relative URL
- Select a Named Credential**: test\_es\_nc
- URL**: /creditservice/credit/schema
- JSON**:
 

```

{
  "operationId": "AccountType",
  "summary": "Returns the Account type for given account ID. Returns error response code.",
  "description": "Returns the Account type for given account ID. Returns error response code.",
  "tags": [
    "creditDecision"
  ],
  "consumes": [
    "text/plain"
  ],
  "produces": [
    "application/json"
  ],
  "parameters": [
    {
      "name": "accountId",

```

Maximum file size: 10MB

**Save & Next**

## Call a MuleSoft Invocable Action from an Orchestration

Call a MuleSoft action (an external service) from a step in your orchestration.

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

SEE ALSO:

[Create Steps to Run MuleSoft Actions](#)

[Salesforce Help: Flow Orchestration MuleSoft Steps \(can be outdated or unavailable during release preview\)](#)

## Fields

Improve org health with limits on inactive picklist values. Streamline your workflow by managing Salutation picklist values in Lightning Experience. And refer to your nonbinary customers with the default Mx. Salutation picklist value.

IN THIS SECTION:

[Limit the Number of Inactive Picklist Values](#)

This update is designed to improve org health and performance by restricting the number of inactive picklist values in a custom picklist field. The panel on the Picklist Settings page in Setup that provided the option to remove the upper bound on inactive picklist values was removed.

[Say Hello to Salutation Picklist Values in Lightning Experience](#)

Streamline your workflow by managing Salutation picklist values in Lightning Experience. Use the Object Manager to add, delete, activate, deactivate, and replace Salutation picklist values. Previously, you switched to Salesforce Classic to modify them.

### [Reflect the Diversity of Your Customers with Gender-Neutral Salutations](#)

Honor all your customers by using titles that align with their identities. The Mx. Salutation picklist value is now available by default. You can customize the Salutation field to include other nonbinary or honorific titles specific to your company. Be sure to review any privacy implications before collecting gender-related data.

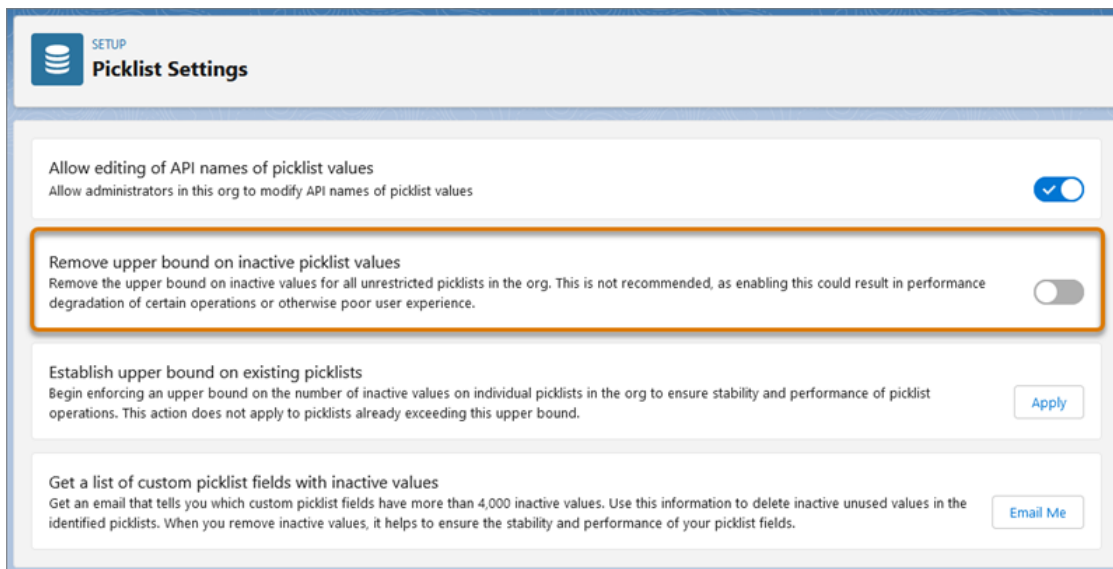
## Limit the Number of Inactive Picklist Values

This update is designed to improve org health and performance by restricting the number of inactive picklist values in a custom picklist field. The panel on the Picklist Settings page in Setup that provided the option to remove the upper bound on inactive picklist values was removed.

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

**When:** This change was announced in Spring '23 and is enforced in Summer '23.

**How:** Now that this 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 new unrestricted custom picklists have a limit of 4,000 inactive values. Any unrestricted custom picklists that were previously created that have more than 4,000 inactive values remain unchanged.



To change the picklist upper bound limit, contact Salesforce Customer Support.

SEE ALSO:

[Salesforce Help: Bulk Delete Inactive Picklist Values \(can be outdated or unavailable during release preview\)](#)

## Say Hello to Salutation Picklist Values in Lightning Experience

Streamline your workflow by managing Salutation picklist values in Lightning Experience. Use the Object Manager to add, delete, activate, deactivate, and replace Salutation picklist values. Previously, you switched to Salesforce Classic to modify them.

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

**How:** From Setup, use the Object Manager to manage Salutation picklist values on the Individual, Lead, Contact, and Person Account objects.

SEE ALSO:

[Salesforce Help: Add or Edit Picklist Values \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Capturing Gender-Related Data with Standard Fields \(can be outdated or unavailable during release preview\)](#)

## Reflect the Diversity of Your Customers with Gender-Neutral Salutations

Honor all your customers by using titles that align with their identities. The Mx. Salutation picklist value is now available by default. You can customize the Salutation field to include other nonbinary or honorific titles specific to your company. Be sure to review any privacy implications before collecting gender-related data.

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

**When:** All Salesforce instances created in Summer '23 or later have Mx. as a standard Salutation picklist value. If your org was created before Summer '23, add the Mx. value manually.

**How:** From Setup, use the Object Manager to manage Salutation picklist values on the Individual, Lead, Contact, and Person Account objects.

SEE ALSO:

[Say Hello to Salutation Picklist Values in Lightning Experience](#)

[Salesforce Help: Add or Edit Picklist Values \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Capturing Gender-Related Data with Standard Fields \(can be outdated or unavailable during release preview\)](#)

## General Setup

Create custom Lightning apps using the new Clone action. Install Data Loader on different operating systems using only one zip file. Get better performance on cases and contacts with enhancements to automatic account sharing recalculation.

IN THIS SECTION:

[Clone Lightning Apps](#)

To quickly create a custom Lightning app based on an existing custom app, use the Clone action in the App Manager. As you progress through the Clone application wizard, you can configure the app details, app options, utility bar and more. You can also use the Quick Save option at any step and skip the rest to copy the configuration as is. This feature is available only for custom Lightning apps. It isn't available for standard, connected, managed, community, or classic apps.

[Use One File to Install Data Loader on macOS or Windows](#)

Unifying the installation files streamlines the setup process and instructions. To install Data Loader on macOS or Windows, follow the instructions in the updated documentation. Previously, Data Loader required separate zip files to deploy on different operating systems.

[Enable Faster Account Sharing Recalculation by Not Storing Case and Contact Implicit Child Shares \(Release Update\)](#)

To improve performance, Salesforce is changing the way that automatic account sharing recalculation works behind the scenes for the Case and Contact objects. We no longer store implicit child share records between accounts and their child case and contact records. Instead, the system determines whether users can access child case and contact records when they try to access them. This release update is available starting in Summer '23.

#### [Recalculate Account Sharing Rules Faster with Updated Opportunity Sharing Behavior](#)

To improve performance for account ownership and sharing rule recalculation, Salesforce is changing the way that automatic sharing calculation works behind the scenes. The system now dynamically determines whether users can access child opportunity records when they try to access them. Previously, child implicit share records between accounts and their child opportunity records were stored. Organization-wide defaults, group membership, role hierarchy, and manual sharing operations can also see improvement after this feature is enabled.

#### [Boost Productivity with Mass Quick Actions on Related Lists \(Beta\)](#)

Save your users time by decluttering the actions in the highlights panel and adding quick actions directly on related lists. Your users can create related records for items in the list without leaving the page. Or they can select up to 100 records in the related list and perform mass updates instead of single record updates.

#### [Track Field History for Net Zero Cloud](#)

See a list of changes to the Net Zero Cloud objects 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 of the Net Zero Cloud objects. The Record History component is automatically added to the default Net Zero Cloud objects Lightning pages.

#### [Accessibility for List Views Is Improved](#)

Learn about small but important changes that make list views more accessible with keyboard shortcuts and screen readers.

#### [See Required Fields at a Glance](#)

When you view, create, edit, or clone records on Lightning Web Component pages that use the Record Detail component, a message now tells you that fields with asterisks are required.

## Clone Lightning Apps

To quickly create a custom Lightning app based on an existing custom app, use the Clone action in the App Manager. As you progress through the Clone application wizard, you can configure the app details, app options, utility bar and more. You can also use the Quick Save option at any step and skip the rest to copy the configuration as is. This feature is available only for custom Lightning apps. It isn't available for standard, connected, managed, community, or classic apps.

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

## Use One File to Install Data Loader on macOS or Windows

Unifying the installation files streamlines the setup process and instructions. To install Data Loader on macOS or Windows, follow the instructions in the updated documentation. Previously, Data Loader required separate zip files to deploy on different operating systems.

**Where:** This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions for orgs that have the API enabled.

SEE ALSO:

[Data Loader Guide: Installing Data Loader](#)



## Enable Faster Account Sharing Recalculation by Not Storing Case and Contact Implicit Child Shares (Release Update)

To improve performance, Salesforce is changing the way that automatic account sharing recalculation works behind the scenes for the Case and Contact objects. We no longer store implicit child share records between accounts and their child case and contact records. Instead, the system determines whether users can access child case and contact records when they try to access them. This release update is available starting in Summer '23.

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

**When:** Salesforce enforces this release update in existing production orgs 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.

For production orgs and scratch orgs created in Summer '23 or later, this behavior is enabled by default. For sandboxes, this behavior is enabled on a rolling basis beginning in Summer '23.

**Why:** Not storing these implicit child share records speeds up ownership and sharing rule recalculation for accounts. Org-wide defaults, group membership, role hierarchy, and manual sharing operations can all see improvement.

**How:** To review this update, from Setup, in the Quick Find box, enter *Release Updates*, and then select **Release Updates**. For Enable Faster Account Sharing Recalculation by Not Storing Case and Contact Implicit Child Shares, follow the testing steps, and click **Apply Update** when your org is ready.

Now you can enable faster account sharing recalculation yourself. Previously, Salesforce Customer Support enabled this functionality.

After this update is enforced, account owners can gain access to cases and contacts owned by high-volume Experience Cloud site users, depending on the org's role hierarchy configuration. SOQL queries or Apex tests that query implicit child case and contact share records no longer return any results because Salesforce no longer stores these records. For more information, see this [knowledge article](#).

### SEE ALSO:

[Release Updates](#)

[Knowledge Article: Faster Account Sharing Recalculation](#)

[Recalculate Account Sharing Rules Faster with Updated Opportunity Sharing Behavior](#)

## Recalculate Account Sharing Rules Faster with Updated Opportunity Sharing Behavior

To improve performance for account ownership and sharing rule recalculation, Salesforce is changing the way that automatic sharing calculation works behind the scenes. The system now dynamically determines whether users can access child opportunity records when they try to access them. Previously, child implicit share records between accounts and their child opportunity records were stored. Organization-wide defaults, group membership, role hierarchy, and manual sharing operations can also see improvement after this feature is enabled.

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

**When:** This feature is available for opportunities after May 22, 2023.

**How:** To enable this feature for opportunities, contact Salesforce Customer Support using a feature activation case.

You can also enable this feature for child cases and contacts through the Enable Faster Account Sharing Recalculation by Not Storing Case and Contact Implicit Child Shares release update.

SOQL queries or Apex tests that query implicit child opportunity share records no longer return any results because Salesforce no longer stores these records. For more information, see this [knowledge article](#).

SEE ALSO:

[Knowledge Article: Faster Account Sharing Recalculation](#)

[Enable Faster Account Sharing Recalculation by Not Storing Case and Contact Implicit Child Shares \(Release Update\)](#)

## Boost Productivity with Mass Quick Actions on Related Lists (Beta)

Save your users time by decluttering the actions in the highlights panel and adding quick actions directly on related lists. Your users can create related records for items in the list without leaving the page. Or they can select up to 100 records in the related list and perform mass updates instead of single record updates.

**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](#).

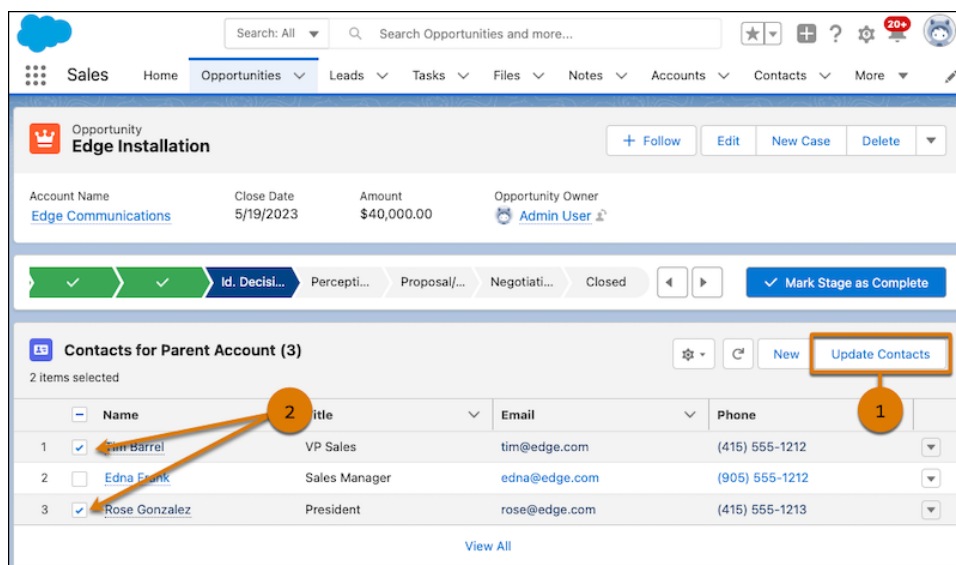
**How:** You can add quick actions on a related list in one of two ways. Only Create a Record and Update a Record quick actions are supported in this release.

- To add quick actions from the Lightning App Builder, add or select the Dynamic Related List - Single component on the record page. In the properties pane, select **Show list view action bar**, and then click **Add Action**.
- To add quick actions using the page layout editor, from the object management settings for the parent object, open the page layout. Double-click to open the related list properties, and then expand the Buttons section and select the quick actions that you want to add.



**Note:** If the quick actions that you add in the page layout editor don't appear on the related list, update the related list type. From the Lightning App Builder, on the parent record page, select the Related List-Single component or the Related Lists component, and then set the related list type to Enhanced List.

Now the related list includes the quick actions that you added (1) and users can apply the actions to the records that they select (2). In Aura Experience Builder sites, the quick actions that you added are also available on the Related List - Single component and when users click View All on a list in the Related Record List component.



SEE ALSO:

[Salesforce Help: Set Up a Mass Quick Action for Related Lists \(Beta\) \(can be outdated or unavailable during release preview\)](#)

## Track Field History for Net Zero Cloud

See a list of changes to the Net Zero Cloud objects 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 of the Net Zero Cloud objects. The Record History component is automatically added to the default Net Zero Cloud objects Lightning pages.

SEE ALSO:

[Track Field History for Net Zero Cloud](#)

## Accessibility for List Views Is Improved

Learn about small but important changes that make list views more accessible with keyboard shortcuts and screen readers.

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

**How:** Check out details about these changes.

- More list view buttons show tooltips when keyboard users tab to them.
- When keyboard users save a new list view or a cloned list view, the keyboard focus moves to the List View Control button instead of the filter panel.
- In the filter panel, when keyboard users close a filter without making changes, the keyboard focus always returns to the filter instead of the Close Filters button.
- To help low-vision users identify changes, filters with unsaved changes in the filter panel include a border and a yellow background. Fields with unsaved inline edits show a border plus a pencil icon and a yellow background. The changes for unsaved inline edits were available publicly but weren't documented before this release.
- The Select a List View button includes more information about the current object for screen readers.
- Screen readers read the first option in the Select a List View dropdown menu correctly.

## See Required Fields at a Glance

When you view, create, edit, or clone records on Lightning Web Component pages that use the Record Detail component, a message now tells you that fields with asterisks are required.

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

**How:** Salesforce shows \* = Required Information on the top right of the page, or at the top of the page on the Salesforce mobile app.

A screenshot of a Salesforce form interface. At the top right, there is a legend: a red asterisk followed by the text "= Required Information". Below this, the form contains two fields. The first field is labeled "\* Lead Status" and is a dropdown menu with the word "New" selected. The second field is labeled "Phone" and is a text input field with a small icon of three dots and a vertical line on the right side.

## Data Cloud (Formerly Customer Data Platform)

---

Ingest, harmonize, unify, analyze, and stream data with Data Cloud, previously called Customer Data Platform. Explore expanded functionality for getting organized and segregate data based on your business needs. Merge and analyze data using existing segment rules and common elements.

### IN THIS SECTION:

#### [Customer Data Platform Is Now Data Cloud](#)

Discover updated documentation and new capabilities with the renaming of Customer Data Platform to Salesforce Data Cloud. During the branding transition, previous brand names still appear in a few places.

#### [Organize Your Data with Data Spaces](#)

Now you can segregate your data, metadata, and processes across multiple brands, departments, or regions for a single Data Cloud instance using data spaces. Segregate data to run processes based on your business needs and for a personalized experience. For example, your business requires your users to see and work on data only in the context of their brand or region. You can also merge and analyze data in data spaces.

#### [Increase Data Refresh with Rapid Segment Publish \(Generally Available\)](#)

Increase the frequency of segment refresh and activation from Data Cloud to Marketing Cloud Engagement for more timely and relevant responses across messaging and journeys. When you create a segment, choose a 1-hour or 4-hour schedule to send activation data, as compared to a standard 12-hour or 24-hour schedule. This feature, which is now generally available, includes some changes since the pilot release.

#### [Save Time with Nested Segments \(Generally Available\)](#)

Build segments within existing segments quickly and consistently. With nested segments, leverage existing segment rules and common elements rather than starting from scratch. This feature, now generally available, includes some changes since the beta release.

### [Narrow a Segment Audience with Exclusion Criteria \(Generally Available\)](#)

Use the new Exclude tab to remove a population subset from a filtered segment based on specific criteria. Easily validate and visualize inclusion versus exclusion filters to target the segment that you want. This feature, now generally available, includes some changes since the beta release.

### [Grow Your High-Value Segments with Einstein Lookalikes](#)

Expand your reach with high-value segments using the power of Einstein. Create a lookalike segment with customers from your first-party data who share characteristics with your high-value customers. Activate the lookalike segment to market to additional customers who are maximally similar to your original seed segment.

### [Create Data Streams with the SFTP Connector in Data Cloud](#)

Make faster and smarter decisions by migrating data from disparate, siloed sources into one central location. Use the new Secure File Transfer Protocol (SFTP) Connector to encrypt and transfer CSV data files from your SFTP server into Data Cloud using SSH. Because many external applications can export data as CSV, you can ingest data from systems like Adobe Campaign, Attentive, Emarsys, Epsilon, Oracle Responsys, and Vibes.

### [Save Time and Prevent Errors with Auto-Mapping Suggestions](#)

Automatically get suggestions when mapping data lake objects (DLOs) fields to data model objects (DMOs) fields using the new Start Data Mapping feature on the Data Streams tab. For example, when ingesting and mapping data about your Marketing Cloud subscribers, after selecting a DMO to map to, you previously manually selected DMO fields. Now, our algorithm automatically suggests which DMO field should be mapped to each DLO field.

### [Transform Data in Near Real Time in Data Cloud](#)

Use a streaming data transform to read in data from a data lake object and reshape it in real time. Cleanse, normalize, and enrich your data and write the output to a target data lake object. By transforming data as it's ingested, you can derive the most relevant customer insights. For example, by combining customer and business data, you can generate recommendations based on of-the-moment shopping behavior or immediate customer support.

### [Authorize Apps to Access Data Cloud Resources](#)

Connected app users can now use the OAuth authorization to restrict access to Data Cloud resources when they're the only required Salesforce services. When you create a connected app, enable OAuth and select Data Cloud as the OAuth scope.

### [Connect to Data Cloud with the New Tableau Connector](#)

The new Tableau connector connects Data Cloud and Tableau seamlessly. The connector is automatically included in a Tableau install and eliminates the additional step to install the connector with a TACO file (.taco) and JDBC driver. The driverless connector is data spaces aware with improved usability that shows the object label instead of the object API name in the Tableau connect UI. The table names in Tableau are now more user friendly. For example, instead of `Lead__d111`, the table name now is `Lead`. The connector is available for Tableau Cloud and Tableau Desktop.

### [Use Amazon SageMaker Models with Data Cloud to Drive Personalization \(Generally Available\)](#)

Connect models built in Amazon SageMaker to enhance Salesforce data for more intelligent predictions and actionable insights that can drive personalization. The capability lets a data scientist access highly curated, harmonized, and near real-time Customer 360 data in Amazon SageMaker. A business can use the insights to enrich their customer profiles, create segments, and customize the end-user experience across various touchpoints.

### [Analyze Your Activation Data Using the Audience DMO \(Pilot\)](#)

Understand and analyze your audience segments over time using the audience data model object (DMO). See when profiles are added, updated, deleted, and unchanged. View profile details, such as the activated attributes, when the activation occurred, and which segment they belong to.

### [Use B2C Commerce Activation Targets](#)

To personalize commerce experiences for your customers, activate your Data Cloud profiles to B2C Commerce. Now you can activate profiles that aren't directly sourced from the B2C Commerce Connector.

### [Protect Your Activation Data with CPRA Tagging](#)

When setting up an external activation platform, use the Privacy Type field to tag its status under the California Privacy Rights Act (CPRA). With CPRA tagging, you receive reminders to check and ensure that your data is compliant.

### [Use Your Own SFTP Server to Activate Segments \(Pilot\)](#)

Bring in your own Secure File Transfer Protocol (SFTP) server to activate data to more external platforms.

### [Power Near Real-Time Orchestration with Marketing Cloud Journeys](#)

Power near real-time orchestration and automate complex operational tasks with journeys sent in Marketing Cloud. You can quickly use data and insights to drive business metrics and personalize your customer experience. Journeys make your business interactions, such as purchases or adoption, more impactful. You can trigger journeys to customers from data model objects and calculated insights.

### [Enrich Data Actions with Related Objects and Attributes](#)

Enrich data actions by adding related objects and more attributes to the data model objects that you selected to configure the data action. This enrichment option is applicable for data actions that are created for all types of data action targets. Give your customers more data when Salesforce records change.

### [Get More out of Data Cloud Lightning Apps](#)

Expanded configuration options for Data Cloud's three Lightning apps give you more control over how Unified Profile-related data is displayed.

### [Refine Match Criteria with Case-Sensitive Matching](#)

Require identity resolution to respect the case of your source data by selecting **Case Sensitive** for specific criteria when you set up custom match rules based on party identification. When selected, two values are matched during identity resolution if both use the same case. For example, if you create a rule based on data that is case sensitive in its original source, such as the 15-digit CRM ID, selecting Case Sensitive ensures that case is respected when the values are matched.

### [Turn Off Scheduled Ruleset Runs](#)

When **Run jobs automatically** is enabled for a ruleset, your identity resolution ruleset jobs are scheduled to run about once a day. When you disable the setting, your ruleset jobs aren't scheduled to run until you reenable it. You can still use the manual Run Ruleset option to start a ruleset job up to four times in any given 24-hour period.

### [Act on Data Changes in Near Real Time](#)

Capture and publish events in near real time based on create, update, and delete record actions made to Data Cloud objects. Depending on the record changes, you can trigger data actions to data action targets, such as Salesforce Platform Event, Webhook, and Marketing Cloud.

### [Prepare Data Visually with Batch Data Transforms](#)

Consolidate and prepare your data in a visual canvas to derive the most relevant customer insights. Join multiple data sources, and aggregate, filter, and bucket fields, and write custom formulas to enrich your data before further analysis. Each operation appears in the canvas as a node, so you can validate your changes at each step by selecting a node and previewing the results.

### [Add New Object Permissions to Custom Permission Sets in Data Cloud](#)

So you can manage data access for future product developments, six new object permissions were introduced in Data Cloud. These permissions were added to standard Data Cloud permission sets, but custom permission sets can't be updated automatically. You must directly add the new object permissions to any custom permission sets that grant users access to data model objects. Users without these object permissions can encounter errors when accessing or working with data model objects.

### [Choose When to Process Calculated Insights](#)

Keep your calculated insights up to date when data changes by using a schedule. You can specify the start date, time, and frequency of the schedule. You can process a calculated insight every 6, 12, 24 hours, or process it manually. The schedule feature is available only for calculated insights created with SQL or Builder.

[Everything New Across Salesforce for Data Cloud](#)

Our latest round of Salesforce features for Data Cloud.

SEE ALSO:

[Salesforce Help: Data Cloud Release Notes Changes](#)

## Customer Data Platform Is Now Data Cloud

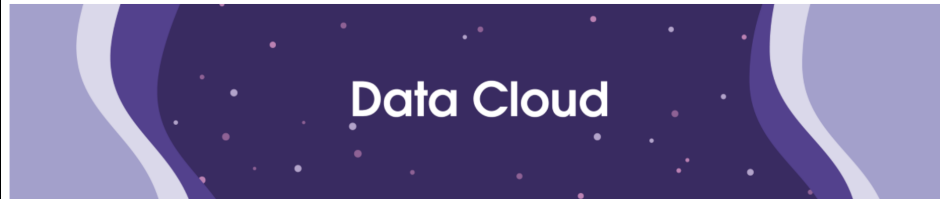
Discover updated documentation and new capabilities with the renaming of Customer Data Platform to Salesforce Data Cloud. During the branding transition, previous brand names still appear in a few places.

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

**How:** For new and existing Data Cloud documentation, start on the [About Salesforce Data Cloud](#) help page.

### About Salesforce Data Cloud

Ingest, harmonize, unify, and analyze streaming and batch data with Salesforce Data Cloud. Then use that data to unlock meaningful and intelligent experiences across Customer 360 applications and beyond.



#### How Does It Work?

- Connect all your data sources whether batch or streaming real-time data.
- Prepare your data through transformation and data governance features.
- Harmonize your data to a standard data model.
- Unify data with identity resolution rulesets.
- Query and analyze data using insights.
- Use AI to predict behavior.
- Analyze, expand, and act on your data in any channel.
- Create personalized experiences.
- Output data to multiple sources to act on data based on your business needs.
- Continue to review, measure, and optimize data.

IN THIS SECTION:

[Customer Data Cloud Is Now Data Cloud in Permission Set Names and Other UI Text](#)

As we transition our branding to Data Cloud, we've updated the standard Data Cloud permission set names and changed the name of Data Cloud Setup.

## Customer Data Cloud Is Now Data Cloud in Permission Set Names and Other UI Text

As we transition our branding to Data Cloud, we've updated the standard Data Cloud permission set names and changed the name of Data Cloud Setup.

## Organize Your Data with Data Spaces

Now you can segregate your data, metadata, and processes across multiple brands, departments, or regions for a single Data Cloud instance using data spaces. Segregate data to run processes based on your business needs and for a personalized experience. For example, your business requires your users to see and work on data only in the context of their brand or region. You can also merge and analyze data in data spaces.

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

**How:** In Customer Data Cloud Setup, under Data Management, click **Data Spaces**, and then click **New**.

SEE ALSO:

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

## Increase Data Refresh with Rapid Segment Publish (Generally Available)

Increase the frequency of segment refresh and activation from Data Cloud to Marketing Cloud Engagement for more timely and relevant responses across messaging and journeys. When you create a segment, choose a 1-hour or 4-hour schedule to send activation data, as compared to a standard 12-hour or 24-hour schedule. This feature, which is now generally available, includes some changes since the pilot release.

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

SEE ALSO:

[Salesforce Help: Increase Segment Refresh from Data Cloud to Marketing Cloud \(can be outdated or unavailable during release preview\)](#)

## Save Time with Nested Segments (Generally Available)

Build segments within existing segments quickly and consistently. With nested segments, leverage existing segment rules and common elements rather than starting from scratch. 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: Create a Nested Segment](#)

## Narrow a Segment Audience with Exclusion Criteria (Generally Available)

Use the new Exclude tab to remove a population subset from a filtered segment based on specific criteria. Easily validate and visualize inclusion versus exclusion filters to target the segment that you want. 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: Segment Your Data with Attributes](#)



## Grow Your High-Value Segments with Einstein Lookalikes

Expand your reach with high-value segments using the power of Einstein. Create a lookalike segment with customers from your first-party data who share characteristics with your high-value customers. Activate the lookalike segment to market to additional customers who are maximally similar to your original seed segment.

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

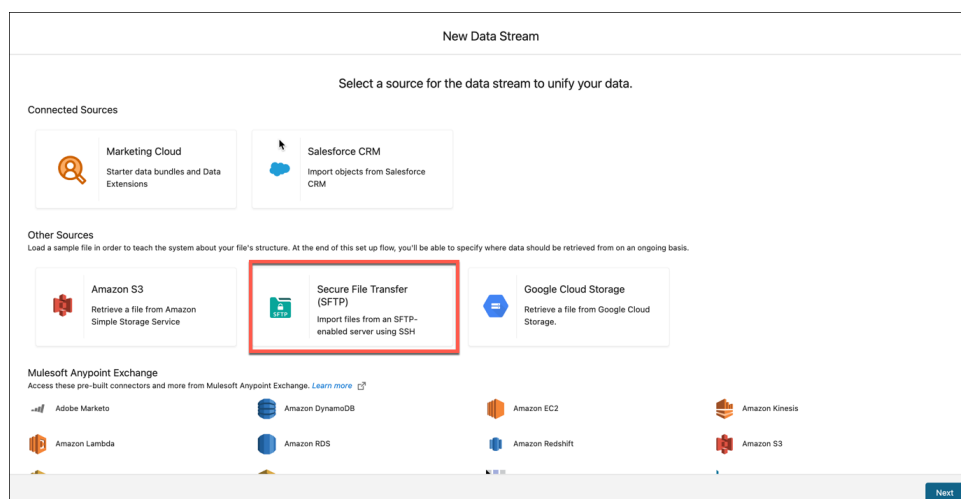
**Who:** This feature is available to Data Cloud customers with a Data Cloud license. This feature isn't available to orgs with Customer Data Platform licenses.

## Create Data Streams with the SFTP Connector in Data Cloud

Make faster and smarter decisions by migrating data from disparate, siloed sources into one central location. Use the new Secure File Transfer Protocol (SFTP) Connector to encrypt and transfer CSV data files from your SFTP server into Data Cloud using SSH. Because many external applications can export data as CSV, you can ingest data from systems like Adobe Campaign, Attentive, Emarsys, Epsilon, Oracle Responsys, and Vibes.

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

**How:** In Data Cloud Setup, create a connection to an SFTP server. Then in Data Streams, select **SFTP** as your source.



## Save Time and Prevent Errors with Auto-Mapping Suggestions

Automatically get suggestions when mapping data lake objects (DLOs) fields to data model objects (DMOs) fields using the new Start Data Mapping feature on the Data Streams tab. For example, when ingesting and mapping data about your Marketing Cloud subscribers, after selecting a DMO to map to, you previously manually selected DMO fields. Now, our algorithm automatically suggests which DMO field should be mapped to each DLO field.

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

**How:** On the Data Streams tab, click **Start Data Mapping**. After you choose a DLO and one or more DMOs, you're provided with mapping suggestions. Salesforce gathers anonymous mapping metadata to give you better mapping suggestions. To opt out of anonymous mapping data sharing, contact Support.

SEE ALSO:

[Salesforce Help: Map Data Model Objects](#)

## Transform Data in Near Real Time in Data Cloud

Use a streaming data transform to read in data from a data lake object and reshape it in real time. Cleanse, normalize, and enrich your data and write the output to a target data lake object. By transforming data as it's ingested, you can derive the most relevant customer insights. For example, by combining customer and business data, you can generate recommendations based on of-the-moment shopping behavior or immediate customer support.

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

**How:** From the Data Transforms tab, click **New**, and complete the required fields.

SEE ALSO:

[Salesforce Help: Streaming Data Transforms](#)

## Authorize Apps to Access Data Cloud Resources

Connected app users can now use the OAuth authorization to restrict access to Data Cloud resources when they're the only required Salesforce services. When you create a connected app, enable OAuth and select Data Cloud as the OAuth scope.

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

SEE ALSO:

[Salesforce Help: Identify Your Users and Manage Access](#)

## Connect to Data Cloud with the New Tableau Connector

The new Tableau connector connects Data Cloud and Tableau seamlessly. The connector is automatically included in a Tableau install and eliminates the additional step to install the connector with a TACO file (.taco) and JDBC driver. The driverless connector is data spaces aware with improved usability that shows the object label instead of the object API name in the Tableau connect UI. The table names in Tableau are now more user friendly. For example, instead of `Lead__d11`, the table name now is `Lead`. The connector is available for Tableau Cloud and Tableau Desktop.

**How:** You must have Tableau Desktop version 23.2 to use the new Tableau connector.

## Use Amazon SageMaker Models with Data Cloud to Drive Personalization (Generally Available)

Connect models built in Amazon SageMaker to enhance Salesforce data for more intelligent predictions and actionable insights that can drive personalization. The capability lets a data scientist access highly curated, harmonized, and near real-time Customer 360 data in Amazon SageMaker. A business can use the insights to enrich their customer profiles, create segments, and customize the end-user experience across various touchpoints.

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

**Who:** Data Cloud customers with the new Data Cloud Starter SKU can access this feature. As per the data platform services card, customers **can** pay for Bring Your Own Model inferences based on usage.

**How:** To connect Data Cloud to your Amazon SageMaker model with an endpoint, use the SageMaker API Gateway as a secure single point of entry. After your setup is complete, log into Salesforce.

In Data Cloud Setup, navigate to the Einstein Studio tab to connect and activate your model.

After the setup is complete, the model appears in the List View. Go to your model to access the record home page and define these details.

- Endpoint: Amazon SageMaker inference endpoint
- Variables: Fields that influence the prediction outcome in the primary data model object
- Output: Output object for the prediction


When your setup is done, activate the model to begin scoring. If your settings or data change, refresh your scores.

Consume your predictions in Salesforce using Query API, Apex, or Flow Builder invocable actions.

## Analyze Your Activation Data Using the Audience DMO (Pilot)

Understand and analyze your audience segments over time using the audience data model object (DMO). See when profiles are added, updated, deleted, and unchanged. View profile details, such as the activated attributes, when the activation occurred, and which segment they belong to.

**Where:** This change applies to Lightning Experience in all 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 the pilot program, contact your account executive.

## Use B2C Commerce Activation Targets

To personalize commerce experiences for your customers, activate your Data Cloud profiles to B2C Commerce. Now you can activate profiles that aren't directly sourced from the B2C Commerce Connector.

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

SEE ALSO:

[Salesforce Help: Activation Targets](#)

[Salesforce Help: Set Up a B2C Commerce Connection](#)

[Salesforce Help: B2C Commerce Connector](#)

## Protect Your Activation Data with CPRA Tagging

When setting up an external activation platform, use the Privacy Type field to tag its status under the California Privacy Rights Act (CPRA). With CPRA tagging, you receive reminders to check and ensure that your data is compliant.

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

SEE ALSO:

[Salesforce Help: Set Up an External Activation Platform](#)

[Salesforce Help: Create an External Activation Platform Activation Target](#)

[Salesforce Help: Create an Activation for Your External Activation Platform](#)

## Use Your Own SFTP Server to Activate Segments (Pilot)

Bring in your own Secure File Transfer Protocol (SFTP) server to activate data to more external platforms.

**Where:** This change applies to Data Cloud in Developer, Enterprise, Performance, and Unlimited editions.



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

SEE ALSO:

[Salesforce Help: Data Cloud Permission Sets](#)

## Power Near Real-Time Orchestration with Marketing Cloud Journeys

Power near real-time orchestration and automate complex operational tasks with journeys sent in Marketing Cloud. You can quickly use data and insights to drive business metrics and personalize your customer experience. Journeys make your business interactions, such as purchases or adoption, more impactful. You can trigger journeys to customers from data model objects and calculated insights.

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

**How:** In Data Cloud, go to the Data Actions Target tab, and click **New**. Enter the action target name and for the action target type, select **Marketing Cloud**. Select a business unit and for the destination, select **Journey Builder API Event**. Select the journey builder API event that you want to send when the data action conditions are met.

SEE ALSO:

[Salesforce Help: Marketing Cloud Data Action Targets \(can be outdated or unavailable during release preview\)](#)

## Enrich Data Actions with Related Objects and Attributes

Enrich data actions by adding related objects and more attributes to the data model objects that you selected to configure the data action. This enrichment option is applicable for data actions that are created for all types of data action targets. Give your customers more data when Salesforce records change.

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

SEE ALSO:

[Salesforce Help: Create a Data Action in Data Cloud \(can be outdated or unavailable during release preview\)](#)

## Get More out of Data Cloud Lightning Apps

Expanded configuration options for Data Cloud's three Lightning apps give you more control over how Unified Profile-related data is displayed.

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

**How:** These components appear automatically when you select an individual profile on the Data Cloud Profile Explorer page. To add one or more components to the Contact record home page for your connected Salesforce org, use the Lightning App Builder.

- Use the Data Cloud Profile Related Records component to show up to 10 fields from objects related to a selected primary data model object.
- Use the Data Cloud Profile Engagements component to show engagement data from selected related objects.
- Use the Data Cloud Profile Insights component to show a selected Calculated Insight measure.

## Refine Match Criteria with Case-Sensitive Matching

Require identity resolution to respect the case of your source data by selecting **Case Sensitive** for specific criteria when you set up custom match rules based on party identification. When selected, two values are matched during identity resolution if both use the same case. For example, if you create a rule based on data that is case sensitive in its original source, such as the 15-digit CRM ID, selecting Case Sensitive ensures that case is respected when the values are matched.

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

## Turn Off Scheduled Ruleset Runs

When **Run jobs automatically** is enabled for a ruleset, your identity resolution ruleset jobs are scheduled to run about once a day. When you disable the setting, your ruleset jobs aren't scheduled to run until you reenable it. You can still use the manual Run Ruleset option to start a ruleset job up to four times in any given 24-hour period.

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

## Act on Data Changes in Near Real Time

Capture and publish events in near real time based on create, update, and delete record actions made to Data Cloud objects. Depending on the record changes, you can trigger data actions to data action targets, such as Salesforce Platform Event, Webhook, and Marketing Cloud.

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

**How:** In Data Cloud, go to the Data Actions tab, and click **New**. Select the data action target, object type, primary object, and event and action rules.

SEE ALSO:

[Salesforce Help: Create a Data Action in Data Cloud \(can be outdated or unavailable during release preview\)](#)

## Prepare Data Visually with Batch Data Transforms

Consolidate and prepare your data in a visual canvas to derive the most relevant customer insights. Join multiple data sources, and aggregate, filter, and bucket fields, and write custom formulas to enrich your data before further analysis. Each operation appears in the canvas as a node, so you can validate your changes at each step by selecting a node and previewing the results.

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

**How:** In Data Cloud, on the Data Transforms tab, select **Data Transforms**. From the Recently Viewed screen, click **New**. On the New Data Transform page, click **Batch Data Transform**.

SEE ALSO:

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

## Add New Object Permissions to Custom Permission Sets in Data Cloud

So you can manage data access for future product developments, six new object permissions were introduced in Data Cloud. These permissions were added to standard Data Cloud permission sets, but custom permission sets can't be updated automatically. You must directly add the new object permissions to any custom permission sets that grant users access to data model objects. Users without these object permissions can encounter errors when accessing or working with data model objects.

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

**When:** These object permissions were added to the standard permission sets for Salesforce orgs with Data Cloud or Customer Data Platform licenses on March 29, 2023.

**How:** Add the new object permissions to each custom permission set that controls user access to in Data Cloud. See Salesforce Help for details.

SEE ALSO:

[Salesforce Help: Add Object Permissions to Custom Permission Sets for Data Cloud](#)

## Choose When to Process Calculated Insights

Keep your calculated insights up to date when data changes by using a schedule. You can specify the start date, time, and frequency of the schedule. You can process a calculated insight every 6, 12, 24 hours, or process it manually. The schedule feature is available only for calculated insights created with SQL or Builder.

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

**How:** In Data Cloud, go to the Calculated Insights tab, and click **New**. Select a data space, select either **Create with Builder** or **Create with SQL**, and follow the directions. From the Schedule dropdown, select a schedule, date, time, and then click **Enable**.

SEE ALSO:

[Salesforce Help: Schedule a Calculated Insight in Data Cloud \(can be outdated or unavailable during release preview\)](#)

## Everything New Across Salesforce for Data Cloud

Our latest round of Salesforce features for Data Cloud.

New and Changed Features

- Data Cloud for Salesforce Flow: [Get Records from Data Cloud Objects in Flow Builder](#)
- Data Cloud and CRM Analytics: [Explore Multiple Data Model Objects in Direct Data Using Joins \(Beta\)](#)
- Data Cloud and CRM Analytics: [Ensure Better Data Accuracy with Fully Qualified Keys](#)
- Data Cloud and CRM Analytics: [Get Improved Performance on Data Cloud Queries](#)
- Data Cloud and Account Engagement: [Use Data Cloud Segments in Account Engagement](#)

# 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.

### Experience Property Type Bundle (Beta)

Introduced in API version 58.0, this component represents a property type. When you create a custom property type for a Lightning web component, deploy this bundle to your org.

# Development

---

Whether you're using Lightning components, Visualforce, Apex, platform events, 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 for Aura components is generally available. Light DOM is generally available, which makes third-party integrations easier. You can also customize a component with multiple stylesheets. RefreshView API is generally available, providing a standard way to refresh component data in LWC and Aura.

[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](#)

Retrieve custom labels using the `System.Label.get(namespace, label, language)` method and optionally specify a language. You can now set a maximum stack depth of Queueable jobs, overriding the default limit of five in Developer and Trial Edition organizations. DataWeave in Apex has significant improvements, including the ability to share scripts across namespaces. The Set class now implements the Iterable interface. The correct DML exception is generated in user-mode DML operations. Reduced redundancy in stack trace output simplifies and clarifies logging. Code coverage is not tracked on tests when they're run during a package install or upgrade.

[API](#)

Query up to five levels of parent-to-child relationships in SOQL queries. The previously announced retirement of API versions 21.0 through 30.0 of the Salesforce Platform API is delayed until Summer '25.

[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.

### 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.

### Salesforce Functions

Salesforce Functions extends the power of Salesforce with elastic compute and language flexibility.

### AppExchange Partners

Apex Unit test data is no longer available in AppExchange App Analytics. You're now limited to how many Trialforce templates per Trialforce Source Organization (TSO) that you can create. Voluntarily request AppExchange security re-reviews on your solutions. Salesforce Code Analyzer scan reports are now required with AppExchange managed package security reviews.

### Change Data Capture

Receive change events for more objects.

### Platform Events

Track the publishing of platform events, and get enhanced event usage metrics.

### Event Bus

Create and manage event relays in Setup. Also, use event relays with Platform Shield Encryption.

### New and Changed Items for Developers

Learn what's new and changed with objects, calls, classes, components, commands, and more to help customize Salesforce features.

## Lightning Components

Lightning Web Security for Aura components is generally available. Light DOM is generally available, which makes third-party integrations easier. You can also customize a component with multiple stylesheets. RefreshView API is generally available, providing a standard way to refresh component data in LWC and Aura.



**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:

#### [Discover the New Lightning Web Components Developer Guide](#)

Calling all Lightning Web Components developers! The LWC Developer Guide has moved to a more modern publishing platform that features improved search and navigation. Temporarily, the new website only displays the English version of the developer guide, but we're posting the Japanese localization soon.

#### [Reduced Limit for Number of Actions in a Boxcar Request](#)

The Lightning Component framework now returns a 413 HTTP response status code if there are more than 250 actions in a boxcar request. Previously, the limit was 2,500 actions. However, pages with thousands of actions can cause slower response time for other users. If a user sees this error, consider redesigning your custom component to follow best practices and reduce the number of actions in a request.

#### [Use Lightning Web Security for Lightning Web Components and Aura Components \(Generally Available\)](#)

Lightning Web Security (LWS) for Aura components is generally available. Salesforce continues the gradual rollout of the LWS architecture, which was announced as generally available for Lightning web components in Spring '22. Salesforce is not enabling LWS automatically for any orgs in Summer '23.



### [API Distortion Changes in Lightning Web Security](#)

Lightning Web Security includes new security protections with additional distortions for web APIs. ESLint rules matching the distortions are also available.

### [Enable Third-Party Integrations with Light DOM \(Generally Available\)](#)

Light DOM is now generally available. 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.

### [Attribute Names Support More Patterns](#)

Attribute name restrictions are loosened to support more use cases. Previously, issues could arise when attribute names were used with a less restrictive syntax environment, such as with a Java-based compiler. Additionally, only a subset of all the possible public properties could be addressed declaratively via the template. Some patterns like `$myattribute` and `_myattribute` are valid public properties that couldn't be set via an LWC template.

### [Synchronize Component Data Without a Page Refresh Using RefreshView API \(Generally Available\)](#)

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 Lightning web components (LWC) and Aura components. Previously, LWC lacked a data refresh API and could only refresh using an Aura wrapper and 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. This feature, now generally available, includes some changes since the last release.

### [Assign CSS Stylesheets to a Component](#)

Now you can extend stylesheets from a superclass component to a subclass component using `super.stylesheets`. The new `stylesheets` static property on the `LightningElement` constructor loads styles from CSS stylesheets into light DOM and shadow DOM components. Previously, CSS custom properties and `CSS::part()` were the only standard mechanisms for customizing components. Also, you couldn't directly reference stylesheets from an extended base class.

### [Create Scoped Slots in Light DOM](#)

Scoped slots are now supported in light DOM Lightning web components. Use scoped slots to access data from a child component and then render it in slotted content inside of a parent component. Because the slotted content belongs to the parent component, any styles on the parent also apply to the content of the scoped slot.

### [Set Dynamic Values for the Slot Attribute in Lightning Web Components](#)

Now you can dynamically specify a value for the `slot` attribute of an HTML element. Previously, this value could only be a static string.

### [Scan More Barcodes at Once, Save Time—Improved Bulk Scanning with BarcodeScanner](#)

Scanning barcodes gets even easier! When you use `BarcodeScanner` in your LWC, you now have the option to enable scanning of multiple barcodes simultaneously. This much-requested feature makes processing large quantities of barcodes a breeze!

### [New scan\(\) Function for BarcodeScanner Does It All](#)

The original `BarcodeScanner` API consists of three separate functions: `beginCapture()`, `resumeCapture()`, and `endCapture()`. The new `scan()` function replaces them by combining the functionality of all three, allowing for a simplified development experience with `BarcodeScanner`.

### [Validate Your Lightning Web Components for Offline Use with the Komaci Static Analyzer](#)

The Komaci Static Analyzer (or static analyzer, for short) is a new developer tool that validates code to ensure it can be used in offline environments. Perfect for developers who are looking to try their hand at writing offline functionality. (Or are already doing it!)

### [Develop Offline-Ready LWCs with the LWC Offline Test Harness](#)

The LWC Offline Test Harness (or Test Harness, for short) is a lightweight testing and debugging app that enables developers to iteratively develop, test, and debug Lightning web components for use in LWC Offline-based mobile apps. The streamlined app experience accelerates the interactive development lifecycle, making it easy to quickly test incremental improvements and fixes to your mobile LWCs.

### [Be Aware of Base Lightning Component Internal DOM Structure Changes for Future Native Shadow Support](#)

Salesforce is preparing the base Lightning components to adopt native shadow DOM to enhance performance and comply with Web Components standards. These updates change the internal DOM structure. Ensure that your tests don't rely on the previous internal structure of these components.

### [Base Component lightning-input Internal DOM Is Changing in Winter '24](#)

Salesforce is preparing the base Lightning components to adopt native shadow DOM to enhance performance and comply with Web Components standards. These updates include changes to the internal DOM structure for the `lightning-input` component, which occur in Winter '24. Ensure that your tests and styling don't rely on the previous internal structure of this component.

### [Identify UTAM Page Objects More Easily with the Browser Extension \(Beta\)](#)

The UTAM browser extension has a refreshed UI that's more intuitive to use. When you write UI tests for a Salesforce application page, it's often confusing to know which page objects (POs) to use. To make PO selection easier, use UTAM's browser extension for Google Chrome. It shows you the appropriate set of POs for the page that you're browsing and identifies which page elements are affected by the methods in a selected PO.

### [Use Error Codes to Fix UTAM Page Objects](#)

The UTAM compiler generates Java or JavaScript page objects from source JSON page objects. If the compiler encounters an error in a JSON page object, it emits an error code and an error message. Errors are reported during the compilation of JSON page objects.

### [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 was first available in Spring '23 and was scheduled to be enforced in Summer '23, but we postponed the enforcement date to Winter '24.

SEE ALSO:

[Lightning Web Components Developer Guide](#)

[Lightning Aura Components Developer Guide](#)

## Discover the New Lightning Web Components Developer Guide

Calling all Lightning Web Components developers! The LWC Developer Guide has moved to a more modern publishing platform that features improved search and navigation. Temporarily, the new website only displays the English version of the developer guide, but we're posting the Japanese localization soon.

**Where:** The new LWC Developer Guide is available in English at <https://developer.salesforce.com/docs/platform/lwc/guide>.

**When:** The English Summer '23 LWC Developer Guide is available now. We're releasing the Japanese localization of the Summer '23 developer guide soon. Until then, readers of the Japanese developer guide can keep using [the Spring '23 guide](#).

**How:** From now on, we're adding new and updated content only to the new developer guide. We're also publishing the Japanese localization of the Summer '23 developer guide there.

The LWC developer guide in the Component Library will be retired after the new Summer '23 Japanese developer guide is published. If you bookmarked or saved links to this version of the developer guide, don't worry, links to that guide automatically redirect you to the

new version. To ensure that your bookmarks don't break in the future, we recommend updating your links to point to the new developer guide.

## Reduced Limit for Number of Actions in a Boxcar Request

The Lightning Component framework now returns a 413 HTTP response status code if there are more than 250 actions in a boxcar request. Previously, the limit was 2,500 actions. However, pages with thousands of actions can cause slower response time for other users. If a user sees this error, consider redesigning your custom component to follow best practices and reduce the number of actions in a request.

**Where:** This change applies to Aura and Lightning web components in Lightning Experience and Salesforce Classic.

SEE ALSO:

[Lightning Aura Components Developer Guide: Queueing of Server-Side Actions](#)

## Use Lightning Web Security for Lightning Web Components and Aura Components (Generally Available)

Lightning Web Security (LWS) for Aura components is generally available. Salesforce continues the gradual rollout of the LWS architecture, which was announced as generally available for Lightning web components in Spring '22. Salesforce is not enabling LWS automatically for any orgs in Summer '23.

**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, which use their own instance of LWS. New orgs, scratch orgs, and sandbox orgs have LWS for Lightning web components and Aura components enabled by default, beginning with the Spring '23 release.

**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:** LWS for Aura is controlled by the **Use Lightning Web Security for Lightning web components and Aura components** setting in Session Settings in Setup. This setting was called **Use Lightning Web Security for Lightning web components** through Winter '23 when LWS applied only to LWC. In Spring '23, the setting was called **Use Lightning Web Security for Lightning web components (GA) and Aura components (Beta)** and controlled LWS for LWC and Aura components.

The **Use Lightning Web Security for Lightning web components and Aura components** setting applies to all existing and new custom Lightning web components and Aura components.

The primary test method is manual validation of your components in a sandbox. We recommend that you set up two identical sandboxes. To compare your components' behavior with LWS versus Lightning Locker, enable the LWS setting in Setup for one of the sandboxes. To compare behaviors if you have only one sandbox, enable or disable the LWS setting in Setup for each comparison.

If you plan to deploy existing or packaged Lightning web components or Aura components to production, test first in a sandbox with LWS enabled.

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 but affects only your Lightning web components. Your org was excluded from LWS for Aura (beta) and is still excluded now that the feature is GA so that it doesn't affect your Aura components in Summer '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 applies only to production orgs. LWS for Aura components is enabled in Summer '23 sandboxes so that you can start testing your Aura components.

This table summarizes whether LWS for LWC and LWS for Aura features are in effect in a Summer '23 production org if LWS was previously enabled in Winter '23 and Spring '23.

If LWS wasn't enabled in a production org in Winter '23 and Spring '23, when your admin enables it in Summer '23, LWS for LWC and LWS for Aura are both in effect.

Custom Components in Org	LWS for LWC	LWS for Aura
None	✓	✓
LWC only	✓	✓
Aura only	✓	✗
LWC and Aura	✓	✗

## API Distortion Changes in Lightning Web Security

Lightning Web Security includes new security protections with additional distortions for web APIs. ESLint rules matching the distortions are also available.

**Where:** This change applies to Lightning Experience in all editions, LWR-based Experience Cloud sites, and Lightning web components in Aura sites when LWS is enabled in the Salesforce org.

**How:** These APIs have new distortions documented in the [LWS Distortion Viewer](#). Corresponding ESLint rules are included in the ESLint package.

- `CustomElementRegistry.prototype.define`
- `CustomElementRegistry.prototype.get`
- `CustomElementRegistry.prototype.whenDefined`
- `Document onsecuritypolicyviolation` event
- `Window onsecuritypolicyviolation` event

These API distortions existed in LWS before Summer '23. They are now documented in the LWS Distortion Viewer.

- `Document.prototype.createProcessingInstruction`
- **Fullscreen API:** `Document.prototype`
- `Document.prototype.onrejectionhandled` and `Document.prototype.onunhandledrejection` [Safari]
- `Document.prototype.releaseCapture`
- `Document.prototype.releaseEvents`
- `Document.prototype.write`
- `Document.prototype.writeln`
- `Document onsecuritypolicyviolation` event
- `HTMLEmbedElement.prototype.getSVGDocument`
- `HTMLIFrameElement.prototype.allowPaymentRequest`
- `HTMLIFrameElement.prototype.csp`
- `HTMLIFrameElement.prototype.featurePolicy`
- `HTMLIFrameElement.prototype.getSVGDocument`

- `HTMLIFrameElement.prototype.referrerPolicy`
- `HTMLIFrameElement.prototype.srcdoc`
- `HTMLObjectElement.prototype.getSVGDocument`
- `HTMLScriptElement.prototype.nonce`

## Enable Third-Party Integrations with Light DOM (Generally Available)

Light DOM is now generally available. Lightning web components render in shadow DOM by default, providing strong encapsulation but posing challenges for global styling and many third-party integrations. With light DOM, your component markup is attached to the host element instead of its shadow tree. You can then access it like any other content in the document host.

**Where:** This change applies to custom Lightning web components in Lightning Experience, Experience Builder sites, and all versions of the Salesforce mobile app. This change also applies to Lightning web components in Open Source.

**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](#)


## Attribute Names Support More Patterns

Attribute name restrictions are loosened to support more use cases. Previously, issues could arise when attribute names were used with a less restrictive syntax environment, such as with a Java-based compiler. Additionally, only a subset of all the possible public properties could be addressed declaratively via the template. Some patterns like `$myattribute` and `_myattribute` are valid public properties that couldn't be set via an LWC template.

**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:** Attribute names can now start with:

- An underscore ( `_` )
- A dollar sign ( `$` )

 **Note:** Attribute names can also start with a lowercase alphabetic character or an optional hyphen followed by an alphabetical character ( `-a` ).

Additionally, attribute names can include duplicate underscores ( `__` ) and an underscore followed by a hyphen ( `_-` ). Also, a hyphen followed by an underscore ( `-_` ) is allowed if the hyphen isn't the first character in the attribute name. For example, these attribute names are valid.

- `_myattribute`
- `$myattribute`
- `my_-attribute`

 **Note:** Attribute names must still end with an alphanumeric character.

## Synchronize Component Data Without a Page Refresh Using RefreshView API (Generally Available)

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 Lightning web components (LWC) and Aura components. Previously, LWC lacked a data refresh API and could only refresh using an Aura wrapper and 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. This feature, now generally available, includes some changes since the last release.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions. Lightning Web Security (LWS) must be enabled in the Salesforce org.

**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 supports refreshes that are triggered by end users or web components. RefreshView API provides a standard mechanism for data refresh experiences in LWC components, allowing flexible control of refresh scopes.

RefreshView API can refresh data for Salesforce platform containers and custom LWC and Aura components. The base Lightning Aura components currently don't support RefreshView API.

Lightning Locker doesn't support RefreshView API.

SEE ALSO:

[Lightning Web Components Developer Guide: Refresh Component Data with RefreshView API](#)

[Lightning Web Components Developer Guide: Lightning Web Security](#)

## Assign CSS Stylesheets to a Component

Now you can extend stylesheets from a superclass component to a subclass component using `super.stylesheets`. The new `stylesheets` static property on the `LightningElement` constructor loads styles from CSS stylesheets into light DOM and shadow DOM components. Previously, CSS custom properties and `CSS ::part()` were the only standard mechanisms for customizing components. Also, you couldn't directly reference stylesheets from an extended base class.

**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:** This update lets you override default styles when you extend from a base Lightning web component that exposes its static `stylesheets`.

**How:** The `stylesheets` property accepts a static array of stylesheets, and its default value is an empty array. Stylesheets are injected into a component in the order that they're listed in the `stylesheets` array.

SEE ALSO:

[Lightning Web Components Developer Guide: Style Components with CSS Stylesheets](#)

## Create Scoped Slots in Light DOM

Scoped slots are now supported in light DOM Lightning web components. Use scoped slots to access data from a child component and then render it in slotted content inside of a parent component. Because the slotted content belongs to the parent component, any styles on the parent also apply to the content of the scoped slot.

**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:** The child component must use light DOM. Scoped slots in shadow DOM aren't supported. The parent component can be a light DOM or shadow DOM component.

To introduce scoped slots into your components, add the directives `lwc:slot-data` and `lwc:slot-bind` to the parent and child components, respectively. See [Lightning Web Components Developer Guide: HTML Template Directives](#) for guidance about how to use these directives.

```
<!-- c/parent.html -->
<template> <!-- Parent component doesn't need to be light DOM -->
  <c-child>
    <template lwc:slot-data="item">
      <span>{item.id} - {item.name}</span>
    </template>
  </c-child>
</template>

<!-- c/child.html -->
<template lwc:render-mode="light"> <!-- Child must be light DOM -->
  <ul>
    <template for:each={item} for:item="item">
      <li key={item.id}>
        <slot lwc:slot-bind={item}</slot>
      </li>
    </template>
  </ul>
</template>
```

```
</ul>
</template>
```

SEE ALSO:

[Lightning Web Components Developer Guide: Light DOM](#)

## Set Dynamic Values for the Slot Attribute in Lightning Web Components

Now you can dynamically specify a value for the `slot` attribute of an HTML element. Previously, this value could only be a static string.

**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:** In this example, the `<span>` element has a `slot` attribute set to the variable `dynamicName`.

```
<template>
  <c-item>
    <span slot={dynamicName}></span>
  </c-item>
</template>
```

This change applies only to the `slot` attribute of HTML elements. It doesn't impact attributes of `<slot>` elements. For example, you still must pass a static string into the attribute `name` for a `<slot>` element.

```
<template>
  <slot name="staticName"></slot>
</template>
```

SEE ALSO:

[Lightning Web Components Developer Guide: Pass Markup Into Slots](#)

## Scan More Barcodes at Once, Save Time—Improved Bulk Scanning with BarcodeScanner

Scanning barcodes gets even easier! When you use BarcodeScanner in your LWC, you now have the option to enable scanning of multiple barcodes simultaneously. This much-requested feature makes processing large quantities of barcodes a breeze!

**Where:** This feature is available in Salesforce mobile apps with up-to-date implementations of BarcodeScanner. Check mobile app compatibility for specific details.



**Note:** Building barcode-scanning functions using the BarcodeScanner API only works in the mobile application, not the web version on mobile or desktop.

**How:** For details on how to use BarcodeScanner in your LWCs, see [See Barcodes on a Mobile Device](#) in the Lightning Web Components Developer Guide.

## New `scan()` Function for BarcodeScanner Does It All

The original BarcodeScanner API consists of three separate functions: `beginCapture()`, `resumeCapture()`, and `endCapture()`. The new `scan()` function replaces them by combining the functionality of all three, allowing for a simplified development experience with BarcodeScanner.



**Where:** This feature is available in all up-to-date implementations of BarcodeScanner.

**Why:** We recommend migrating to the new `scan()` function to take advantage of the streamlined development experience it offers. The functions `beginCapture()`, `resumeCapture()`, and `endCapture()` remain available, but will be retired in a future release.



**Note:** Building barcode-scanning functions using the BarcodeScanner API only works in the mobile application, not the web version on mobile or desktop.

**How:** For details on how to use BarcodeScanner in your LWCs, see [See Barcodes on a Mobile Device](#) in the Lightning Web Components Developer Guide.

## Validate Your Lightning Web Components for Offline Use with the Komaci Static Analyzer

The Komaci Static Analyzer (or static analyzer, for short) is a new developer tool that validates code to ensure it can be used in offline environments. Perfect for developers who are looking to try their hand at writing offline functionality. (Or are already doing it!)

**Where:** This feature is publicly available as an ESLint plugin, and can be installed with a package manager such as npm or Yarn.

**How:** For details on how to use Komaci Static Analyzer during offline component development, see [Validate Lightning Web Components for Offline Use](#) in the Mobile Offline Developer Guide.

## Develop Offline-Ready LWCs with the LWC Offline Test Harness

The LWC Offline Test Harness (or Test Harness, for short) is a lightweight testing and debugging app that enables developers to iteratively develop, test, and debug Lightning web components for use in LWC Offline-based mobile apps. The streamlined app experience accelerates the interactive development lifecycle, making it easy to quickly test incremental improvements and fixes to your mobile LWCs.

**Where:** This tool is publicly available for download as both an app file (iOS) and an APK file (Android).

**How:** For details on how to use Test Harness during offline component development, see [Develop Offline-Ready LWCs with the LWC Offline Test Harness](#) in the Mobile Offline Developer Guide.

## Be Aware of Base Lightning Component Internal DOM Structure Changes for Future Native Shadow Support

Salesforce is preparing the base Lightning components to adopt native shadow DOM to enhance performance and comply with Web Components standards. These updates change the internal DOM structure. Ensure that your tests don't rely on the previous internal structure of these components.

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

**Why:** Salesforce works continuously to align the base Lightning components with web standards. This newest effort is part of our process for Lightning Web Components to support native shadow DOM in a future release ([safe harbor](#)). In Spring '23, the internal structure of `lightning-button` and `lightning-button-group` base Lightning components changed to enable future support of Native Shadow DOM.

In Summer '23, these components have been adapted to prepare for native shadow DOM.

- `lightning-dual-listbox`
- `lightning-dynamic-icon`
- `lightning-breadcrumb`

- `lightning-breadcrumbs`
- `lightning-vertical-navigation` and its subcomponents
  - `lightning-vertical-navigation-section`
  - `lightning-vertical-navigation-item`
  - `lightning-vertical-navigation-overflow`
  - `lightning-vertical-navigation-item-badge`
  - `lightning-vertical-navigation-item-icon`

Salesforce has [documented](#) that the internal component structure is protected. Salesforce may at any time redesign the internals of our components to improve performance, enhance functionality, and support accessibility. For more information, see [Anti-Patterns for Styling Components](#).

**Important:** *If your tests rely on this protected internal DOM structure, rewrite your tests as soon as possible.*

**How:** For supported integration tests, use the [UI Test Automation Model \(UTAM\)](#) and [UTAM Page Objects](#), which stay up to date with changes in component structure. For supported Selenium-based tests, see [Working With Shadow DOM Elements Using Webdriver](#). For supported CSS styling, see [CSS in the Lightning Web Components Developer Guide](#).

 **Note:** Base components are currently not supported in [Mixed Shadow Mode \(Developer Preview\)](#).

SEE ALSO:

[Lightning Web Components Developer Guide: DOM Inspection Tests Are Subject To Change](#)

## Base Component `lightning-input` Internal DOM Is Changing in Winter '24

Salesforce is preparing the base Lightning components to adopt native shadow DOM to enhance performance and comply with Web Components standards. These updates include changes to the internal DOM structure for the `lightning-input` component, which occur in Winter '24. Ensure that your tests and styling don't rely on the previous internal structure of this component.

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

**When:** This change occurs in Winter '24.

**Why:** Salesforce works continuously to align the base Lightning components with web standards. This effort is part of our process for Lightning Web Components to support native shadow DOM in a future release ([safe harbor](#)). In Spring '23 and Summer '23, 12 components were adapted to prepare for native shadow DOM, as we announced in [Be Aware of Base Lightning Component Internal DOM Structure Changes for Future Native Shadow Support](#).

In Winter '24, we're changing the internal structure of the `lightning-input` component to prepare for native shadow DOM. The input component is widely used, so we're announcing this planned change in advance to give you more time to adjust your component styling and testing, if needed.

Salesforce [documented](#) that the internal component structure is protected. Salesforce can at any time redesign the internals of our components to improve performance, enhance functionality, and support accessibility. For more information, see [Anti-Patterns for Styling Components](#).

**Important:** If your tests rely on this protected internal DOM structure, rewrite your tests as soon as possible.


**How:** For supported integration tests, use the [UI Test Automation Model \(UTAM\)](#) and [UTAM Page Objects](#), which stay up to date with changes in component structure. For supported Selenium-based tests, see [Working With Shadow DOM Elements Using Webdriver](#). For supported CSS styling, see [CSS in the Lightning Web Components Developer Guide](#).

 **Note:** Base components are currently not supported in [Mixed Shadow Mode \(Developer Preview\)](#).

## Identify UTAM Page Objects More Easily with the Browser Extension (Beta)

The UTAM browser extension has a refreshed UI that's more intuitive to use. When you write UI tests for a Salesforce application page, it's often confusing to know which page objects (POs) to use. To make PO selection easier, use UTAM's browser extension for Google Chrome. It shows you the appropriate set of POs for the page that you're browsing and identifies which page elements are affected by the methods in a selected PO.

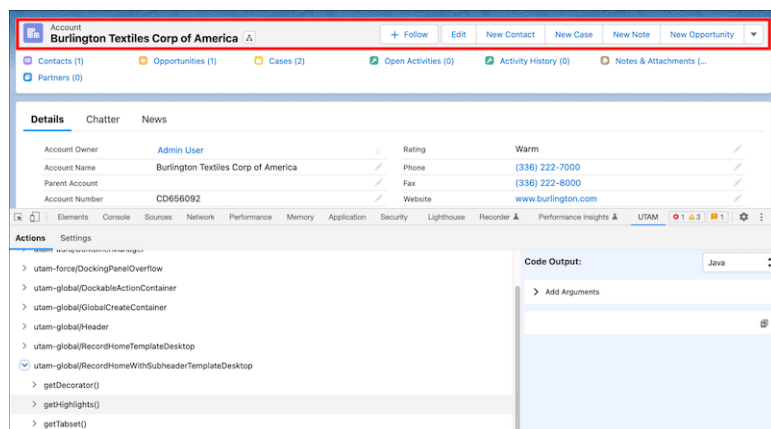
**Where:** This change applies to Lightning Experience and all versions of the Salesforce mobile app.

 **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:** Install the UTAM browser extension from the [Chrome Web Store](#).

The browser extension adds a UTAM tab to Chrome's developer tools.

In this example, the user has hovered over the `getHighlights()` method in the UTAM panel in Chrome's developer tools, and the related UI in the main window is highlighted in red.



SEE ALSO:

[utam.dev: Browser Extension](#)

## Use Error Codes to Fix UTAM Page Objects

The UTAM compiler generates Java or JavaScript page objects from source JSON page objects. If the compiler encounters an error in a JSON page object, it emits an error code and an error message. Errors are reported during the compilation of JSON page objects.

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

SEE ALSO:

[utam.dev: Error Codes](#)

## 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 was first available in Spring '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 apps, including Lightning Experience, and all versions of the Salesforce mobile app. This change doesn't apply to Lightning Out apps.

**When:** Salesforce enforces this update for all orgs in Winter '24 and for sandboxes 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:** 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, where this release update is enforced in Summer '23. To disable the release update in a sandbox, contact your Salesforce account executive.

In a production org, you can activate the release update 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](#)

## 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:

[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 made available in Winter '23, and was scheduled to be enforced in Winter '24. The enforcement date has been postponed to Spring '24.

[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.

## 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 made available in Winter '23, and was scheduled to be enforced in Winter '24. The enforcement date has been postponed to Spring '24.

**Where:** This change applies to Lightning Experience and Salesforce Classic 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 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](#)

## 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

Retrieve custom labels using the `System.Label.get(namespace, label, language)` method and optionally specify a language. You can now set a maximum stack depth of Queueable jobs, overriding the default limit of five in Developer and Trial Edition organizations. DataWeave in Apex has significant improvements, including the ability to share scripts across namespaces. The Set class now implements the Iterable interface. The correct DML exception is generated in user-mode DML operations. Reduced redundancy in stack trace output simplifies and clarifies logging. Code coverage is not tracked on tests when they're run during a package install or upgrade.

For more information on these enhancements, see the [Apex Developer Guide](#) and the [Apex Reference Guide](#).

## IN THIS SECTION:

[Access Labels in Apex Dynamically](#)

Use the `System.Label.get(namespace, label, language)` method to get a custom label, optionally specifying a language. The feature now allows dynamic resolution of label names at run time, including overriding the user's current language if a translation exists for the requested language. Previously, retrieving labels required compile-time knowledge of the label API name.

[Configure Stack Depth of Chained Queueable Jobs \(Beta\)](#)

You can now set a maximum stack depth of Queueable jobs, overriding the default limit of five in Developer and Trial Edition orgs. This feature provides a larger safety mechanism to prevent run-away recursive jobs from consuming the daily Async Apex limit.

[Use DataWeave in Apex to Enable Data Transformation to Different Formats \(Beta\)](#)

You can now share DataWeave scripts across namespaces. Specify a namespace name in the new `DataWeave.createScript(namespace, scriptName)` method overload. Performance is improved with first-time DataWeave script creation and execution. Checks for feature support are done at script creation time instead of at runtime. You must specify encoding for binary input (Apex Blobs) to be coerced to strings: `binaryVariable as String {encoding: 'utf8' }`.

[Use the Iterable Interface with Set Type](#)

The Set class now implements the Iterable interface, so you can directly iterate over sets. Both sets and lists are iterable, allowing for more code reuse.

[See Improved Logging with Assert Class Methods](#)

Reduced redundancy in stack trace output simplifies and clarifies logging. Previously, when some `Assert` class methods caused a test to fail, the logged stack trace showed duplicate entries.

[Manage DML Exceptions in User-Mode Database Operations](#)

Database methods for user-mode DML operations generate the correct `DMLException`. Previously they generated a `SecurityException`. This behavior is versioned, and the correct exception is generated in API version 58.0 and later.

[Code Coverage of Tests Run during Package Install Has Changed](#)

To improve performance, code coverage isn't tracked on tests that are annotated with `IsTest(OnInstall=true)` and run during package install or upgrade. However, code coverage is tracked and counted during a package creation operation.

[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.

## SEE ALSO:

[Apex: New and Changed Items](#)

## Access Labels in Apex Dynamically

Use the `System.Label.get(namespace, label, language)` method to get a custom label, optionally specifying a language. The feature now allows dynamic resolution of label names at run time, including overriding the user's current language if a translation exists for the requested language. Previously, retrieving labels required compile-time knowledge of the label API name.

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

**How:** From Setup, create custom label strings and then assign translated values by turning on Translation Workbench and adding translation mapping. Retrieve the label for a default language setting or for a language and namespace by using `System.Label.get(namespace, label, language)`. You can also check if translation exists for a label and language

in a namespace by using `Label.translationExists(namespace, label, language)`. You can't access labels that are protected in a different namespace.

SEE ALSO:

[IdeaExchange: Add Apex API for Custom Labels](#)

## Configure Stack Depth of Chained Queueable Jobs (Beta)

You can now set a maximum stack depth of Queueable jobs, overriding the default limit of five in Developer and Trial Edition orgs. This feature provides a larger safety mechanism to prevent run-away recursive jobs from consuming the daily Async Apex limit.



**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 Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

**How:** Enqueue jobs by using the new `System.enqueueJob()` overload. The method overload has an optional `AsyncObjects` parameter where you can specify the maximum stack depth and the minimum queue delay.



**Note:** You can test chained queueables using appropriate stack depths, but be aware of applicable Apex governor limits.

Use these methods in the new `System.AsyncInfo` class to determine the current and maximum stack depths and to get the minimum queueable delay.

- `getCurrentQueueableStackDepth()`
- `getMaximumQueueableStackDepth()`
- `getMinimumQueueableDelayInMinutes()`
- `hasMaxStackDepth()`

This example uses stack depth to terminate a chained job and prevent it from reaching the daily maximum number of asynchronous Apex method executions.

```
// Fibonacci
public class FibonacciDepthQueueable implements Queueable {

    private integer nMinus1, nMinus2;

    public static void calculateFibonacciTo(integer depth) {
        AsyncOptions asyncOptions = new AsyncOptions();
        asyncOptions.MaximumQueueableStackDepth = depth;
        System.enqueueJob(new FibonacciDepthQueueable(null, null), asyncOptions);
    }

    private FibonacciDepthQueueable(integer nMinus1param, integer nMinus2param) {
        nMinus1 = nMinus1param;
        nMinus2 = nMinus2param;
    }

    public void execute(QueueableContext context) {

        integer depth = AsyncInfo.getCurrentQueueableStackDepth();

        // Calculate step
        integer fibonacciSequenceStep;
```

```

        switch on (depth) {
            when 1, 2 {
                fibonacciSequenceStep = 1;
            }
            when else {
                fibonacciSequenceStep = nMinus1 + nMinus2;
            }
        }

        System.debug('depth: ' + depth + ' fibonacciSequenceStep: ' + fibonacciSequenceStep);

        if(System.AsyncInfo.hasMaxStackDepth() &&
            AsyncInfo.getCurrentQueueableStackDepth() >=
            AsyncInfo.getMaximumQueueableStackDepth()) {
            // Reached maximum stack depth
            Fibonacci__c result = new Fibonacci__c(
                Depth__c = depth,
                Result = fibonacciSequenceStep
            );
            insert result;
        } else {
            System.enqueueJob(new FibonacciDepthQueueable(fibonacciSequenceStep, nMinus1));
        }
    }
}

```

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

You can now share DataWeave scripts across namespaces. Specify a namespace name in the new `DataWeave.createScript(namespace, scriptName)` method overload. Performance is improved with first-time DataWeave script creation and execution. Checks for feature support are done at script creation time instead of at runtime. You must specify encoding for binary input (Apex Blobs) to be coerced to strings: `binaryVariable as String {encoding: 'utf8'}`.



**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:** DataWeave in Apex 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. 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. Set the `isGlobal` field in the `DataWeaveResource` metadata object for the generated `DataWeaveScriptResource` class to be global.



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 Iterable Interface with Set Type

The Set class now implements the Iterable interface, so you can directly iterate over sets. Both sets and lists are iterable, allowing for more code reuse.

**Where:** This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions. This change is a versioned change in API version 58.0 and later.

**How:** This example uses the `String.join` method with a Set, which was previously unsupported because Set didn't implement Iterable.

```
Set<String> letters = new Set<String>{'a','b','c','d'};
System.debug(String.join(letters, '...'));
```

SEE ALSO:

[IdeaExchange: Apex Code: Implement Iterable on Set](#)

## See Improved Logging with Assert Class Methods

Reduced redundancy in stack trace output simplifies and clarifies logging. Previously, when some `Assert` class methods caused a test to fail, the logged stack trace showed duplicate entries.

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

## Manage DML Exceptions in User-Mode Database Operations

Database methods for user-mode DML operations generate the correct `DmlException`. Previously they generated a `SecurityException`. This behavior is versioned, and the correct exception is generated in API version 58.0 and later.

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

**How:** In this example, a `DmlException` is generated because the required Name field isn't populated.

```
Account acct = new Account();
try {
    insert as user acct;
    Assert.fail('DmlException expected due to missing Name field');
} catch (Exception ex) {
    Assert.isTrue(ex.getMessage().contains('REQUIRED_FIELD_MISSING'));
    // This assertion fails with API versions below v58.0 because a SecurityException
    // is generated
    Assert.isInstanceOfType(ex, DmlException.class);
}
```

## Code Coverage of Tests Run during Package Install Has Changed

To improve performance, code coverage isn't tracked on tests that are annotated with `IsTest (OnInstall=true)` and run during package install or upgrade. However, code coverage is tracked and counted during a package creation operation.

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

**How:** Because Apex code installed from a managed package is excluded from org level requirements for code coverage, it's unlikely that you're affected. But, if you track managed package test coverage, you must rerun these tests outside of the package install or upgrade operation for code coverage statistics to be updated.

Package install isn't blocked by code coverage requirements.

## 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 it enables [RFC 7230](#) validation. After the update, invalid characters such as `/` (slash) are no longer accepted.

**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 `InvalidHeaderException` exceptions.
- 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.

## API

Query up to five levels of parent-to-child relationships in SOQL queries. The previously announced retirement of API versions 21.0 through 30.0 of the Salesforce Platform API is delayed until Summer '25.

### IN THIS SECTION:

#### [Query Five Levels of Parent-to-Child Relationships in SOQL Queries](#)

SOQL now supports relationship queries that traverse up to five levels of parent-child records. Use a single SOQL query to get parent-child records from five different levels. This ability is limited to SOQL queries via the REST and SOAP query calls on standards and custom objects.

#### [Async SOQL Is Being Retired](#)

Async SOQL is retired in Summer '23. Use Bulk API or batch Apex to query big objects.

#### [Salesforce Platform API Versions 21.0 Through 30.0 Retirement \(Release Update\)](#)

The retirement of versions 21.0 through 30.0 of the Salesforce Platform API was first scheduled for Summer '23. The retirement is now postponed to Summer '25. You can continue to use these API versions but they're not supported and won't be available starting in Summer '25. Applications consuming them are then disrupted. Requests fail with an error message indicating that the endpoint is deactivated. Upgrade all applications that use a legacy API version to a current version before this breaking change occurs.

## Query Five Levels of Parent-to-Child Relationships in SOQL Queries

SOQL now supports relationship queries that traverse up to five levels of parent-child records. Use a single SOQL query to get parent-child records from five different levels. This ability is limited to SOQL queries via the REST and SOAP query calls on standards and custom objects.

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

**How:** In API version 58.0 and later, SOQL relationship queries can contain a parent root as the first level of the query and child relationships up to four levels deep from the parent root.

This example SOQL relationship query returns records from the parent object Account and its child objects Contacts, Assets, WorkOrders, and WorkOrderLineItems.

```
SELECT Name,
  (SELECT LastName,
    (SELECT AssetLevel,
      (SELECT Description,
        (SELECT LineItemNumber FROM WorkOrderLineItems)
        FROM WorkOrders)
      FROM Assets)
    FROM Contacts)
  FROM Account
```

### SEE ALSO:

[SOQL and SOSL Reference: Using Relationship Queries](#)

## Async SOQL Is Being Retired

Async SOQL is retired in Summer '23. Use Bulk API or batch Apex to query big objects.

**Where:** This change affects all versions of Async SOQL.

For information on migrating, refer to the [feature retirement support article](#).

## Salesforce Platform API Versions 21.0 Through 30.0 Retirement (Release Update)

The retirement of versions 21.0 through 30.0 of the Salesforce Platform API was first scheduled for Summer '23. The retirement is now postponed to Summer '25. You can continue to use these API versions but they're not supported and won't be available starting in Summer '25. Applications consuming them are then disrupted. Requests fail with an error message indicating that the endpoint is deactivated. Upgrade all applications that use a legacy API version to a current version before this breaking change occurs.

**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 Professional (with API access enabled), Enterprise, Performance, Unlimited, and Developer editions. It affects all API-enabled orgs, including Sandboxes and Scratch orgs.

**How:** Modify or upgrade all applications to function with current API versions before the Summer '25 release. Newer API versions offer more capabilities and improved security and performance.

Identify requests made from old or unsupported API versions of SOAP API, REST API, and Bulk API using the [API Total Usage](#) event.

SEE ALSO:

[Release Updates](#)

[Knowledge Article: Salesforce Platform API Versions 21.0 through 30.0 Retirement](#)

## 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:

[Transfer Package Ownership to a Different Dev Hub \(Generally Available\)](#)

Ownership transfer of an unlocked package or second-generation managed package (managed 2GP) from one Dev Hub org to another is generally available. A transfer can occur internally between two Dev Hub orgs that you own, or you can transfer a package externally to another Salesforce customer, Salesforce Partner, or ISV. This change provides a way to sell an unlocked or second-generation managed package.

[Experience Better Performance for Packaging Operations](#)

Package installs and upgrades are now faster. When you upgrade a managed package, deployment is optimized so that unchanged metadata isn't redeployed for certain metadata types. The updated package install and upgrade process also optimizes how and when Apex tests are run. And for second-generation managed packages with dependencies, creating a new package version is now faster.

[Reference Standard Value Sets By Specifying a Seed Metadata Directory](#)

Now you can reference standard value sets in your unlocked package or second-generation managed package even though they can't be included in the package itself. If your package depends on standard value sets, you can specify a seed metadata directory that contains the value sets.

[Reduce Translated Package Size with Language Extension Packages \(Beta\)](#)

To reduce the size of packages with translations, language extension packages can now modify the translations for components in base packages. Previously, translations included in a language extension package only applied to extension components.

## Transfer Package Ownership to a Different Dev Hub (Generally Available)

Ownership transfer of an unlocked package or second-generation managed package (managed 2GP) from one Dev Hub org to another is generally available. A transfer can occur internally between two Dev Hub orgs that you own, or you can transfer a package externally to another Salesforce customer, Salesforce Partner, or ISV. This change provides a way to sell an unlocked or second-generation managed package.

**Where:** This change applies to unlocked packages and second-generation managed packages.

**How:** To initiate a package transfer, log a case with either Salesforce Partner Support or Salesforce Customer Support. Because this procedure is complex, Salesforce performs the package transfer process for you.

For security reasons, package transfers between a Dev Hub located in Government Cloud and a Dev Hub located outside Government Cloud aren't permitted.

For second-generation managed packages, package transfers are only available for packages that have passed AppExchange security review. If your managed 2GP package hasn't passed security review, consider creating a new managed 2GP using your preferred Dev Hub.

## SEE ALSO:

[Salesforce DX Developer Guide: Transfer a Second-Generation Managed Package to a Different Dev Hub](#)

[Salesforce DX Developer Guide: Take Ownership of a Second-Generation Managed Package Transferred from a Different Dev Hub](#)

[Salesforce DX Developer Guide: Transfer an Unlocked Package to a Different Dev Hub](#)

[Salesforce DX Developer Guide: Take Ownership of an Unlocked Package Transferred from a Different Dev Hub](#)

## Experience Better Performance for Packaging Operations

Package installs and upgrades are now faster. When you upgrade a managed package, deployment is optimized so that unchanged metadata isn't redeployed for certain metadata types. The updated package install and upgrade process also optimizes how and when Apex tests are run. And for second-generation managed packages with dependencies, creating a new package version is now faster.

**Where:** This change applies to unlocked packages and first- and second-generation managed packages.

## Reference Standard Value Sets By Specifying a Seed Metadata Directory

Now you can reference standard value sets in your unlocked package or second-generation managed package even though they can't be included in the package itself. If your package depends on standard value sets, you can specify a seed metadata directory that contains the value sets.

**Where:** This change applies to unlocked packages and second-generation managed packages.

**How:** In your `sfdx-project.json` file, specify `seedMetadata` to indicate the path to the standard value set.

```
"packageDirectories": [
  {
    "path": "force-app",
    "package": "TV_un1",
    "versionName": "ver 2.1",
    "versionNumber": "2.1.2.NEXT",
    "default": true,
    "ancestorVersion": "2.0.0.0"
    "seedMetadata": {
      "path": "my-unpackaged-seed-directory"
    }
  },
]
```

If you're an ISV, work with your subscribers to ensure that they update their standard value sets before they install your package. For unlocked package developers, the same principle applies. Before installing the package, update the standard value sets in the installation org.

## Reduce Translated Package Size with Language Extension Packages (Beta)

To reduce the size of packages with translations, language extension packages can now modify the translations for components in base packages. Previously, translations included in a language extension package only applied to extension components.

**Where:** This change applies to unlocked and second-generation managed packages with translations.



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

**When:** This feature was briefly available in Spring '22 then was removed and now is included in Summer '23.

**How:** Before you include translations in an extension package, review the Salesforce DX Developer Guide for important considerations about how to remove those translations. Then plan to share that information with your subscribers.

SEE ALSO:

[Salesforce DX Developer Guide: Translation \(can be outdated or unavailable during release preview\)](#)

## Development Environments

Development environments are full-featured Salesforce environments that you use to develop and test existing or new features and custom applications. They include Developer Edition orgs, sandboxes, and scratch orgs.

### IN THIS SECTION:

#### [Quickly Create Full Sandboxes \(Generally Available\)](#)

The Quick Create technology enhances the speed at which Full sandboxes are created or refreshed. Teams can focus more time on developing and testing solutions, and less time waiting for sandboxes to be built.

#### [Changes to Sandbox License Compliance Process](#)

To ensure sandbox license compliance, we inform you when you have more sandboxes than provisioned licenses. When you exceed your sandbox allocations, we lock the appropriate number of sandboxes to restore your license compliance, starting with the least recently used sandboxes. After you meet compliance, locked sandboxes are unlocked. If you do nothing, sandboxes locked for more than 60 days are deleted and can't be recovered.

## Quickly Create Full Sandboxes (Generally Available)

The Quick Create technology enhances the speed at which Full sandboxes are created or refreshed. Teams can focus more time on developing and testing solutions, and less time waiting for sandboxes to be built.

**Where:** This change applies to new Full sandbox requests for production orgs on eligible Hyperforce instances.

**When:** Due to technical issues, we're delaying the release of this feature until further notice.

**Who:** To create or refresh a Full sandbox, you need the Manage Sandbox user permission.

**How:** Salesforce admins don't have to enable this feature. Quick Create is the default for new Full sandbox requests on eligible Hyperforce instances.

### SEE ALSO:

[Salesforce Help: Create a Sandbox](#)

## Changes to Sandbox License Compliance Process

To ensure sandbox license compliance, we inform you when you have more sandboxes than provisioned licenses. When you exceed your sandbox allocations, we lock the appropriate number of sandboxes to restore your license compliance, starting with the least recently used sandboxes. After you meet compliance, locked sandboxes are unlocked. If you do nothing, sandboxes locked for more than 60 days are deleted and can't be recovered.

**Where:** This change applies to expired or discontinued sandbox licenses of Professional, Enterprise, Performance, Unlimited, and Database.com editions.

**When:** This feature is deferred until Fall 2023. See Winter '24 Release Notes (when available) for timing details.

**Who:** Notifications are sent to all users with Manage Sandbox user permission.

**How:** What can I do to get back into sandbox license compliance?

- Free up sandbox licenses by deleting any unused or locked sandboxes.

- Purchase additional sandbox licenses to cover your required number of sandboxes by contacting your Salesforce Account Executive. Be sure to allow provisioning time when purchasing licenses!

SEE ALSO:

[Salesforce Help: Unlock a Sandbox](#)

## 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.

[Deploy Scalable Apps and Analyze System Performance with Scale Center](#)

Scale Center provides self-service and near-real-time access to performance metrics. Diagnose root causes and act on scale issues earlier in your development cycle. Create analysis reports to troubleshoot errors. Retrieve customized insights and recommendations.

[Conduct Quick, Easy, and Accurate Scale Tests with Scale Testing Service](#)

Scale Testing Service gives you a suite of features that includes Test Environment Setup, Test Execution, and Test Plan Creation. Access insights into scale hotspots, trial runs, test trends, and more. Be confident that your implementation scales and adheres to your performance SLAs.

## Develop Platform Apps with Ease

The Salesforce DX toolset includes Salesforce Extensions for Visual Studio Code and Salesforce CLI. Pick the tool that works best for your team and meets your business needs. We release new versions of both tools weekly.

### **Salesforce Extensions for Visual Studio Code**

This extension pack includes tools for developing on the Customer 360 Platform in the lightweight, extensible VS Code editor. Read the weekly release notes to learn about [recent updates](#).

### **Salesforce CLI**

Use Salesforce CLI to create environments for development and testing, synchronize source code, run tests, and control your application lifecycle. Read the weekly release notes to learn about [recent updates](#).

SEE ALSO:

[Salesforce Extensions for Visual Studio Code](#)

[Salesforce CLI Setup Guide](#)

[Salesforce CLI Command Reference](#)

[Salesforce DX Developer Guide](#)

## Deploy Scalable Apps and Analyze System Performance with Scale Center

Scale Center provides self-service and near-real-time access to performance metrics. Diagnose root causes and act on scale issues earlier in your development cycle. Create analysis reports to troubleshoot errors. Retrieve customized insights and recommendations.



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

**Who:** This service is available to all Unlimited Edition Production orgs. Users are subject to the applicable terms provided at [Agreements and Terms](#).

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

Unlimited Edition Production orgs automatically get access to Scale Center.

Scale Center isn't supported in Government Cloud Plus. Don't enable Scale Center in your Government Cloud Plus org. Contact your Salesforce account executive for more details.

To select a time range and launch an analysis, click and drag on any chart:



## See Also

- [Knowledge Article: Performance test FAQs](#)
- [Trailblazer Community Group: Salesforce Scalability](#)
- [Salesforce Well-Architected: Scalability](#)

## Conduct Quick, Easy, and Accurate Scale Tests with Scale Testing Service

Scale Testing Service gives you a suite of features that includes Test Environment Setup, Test Execution, and Test Plan Creation. Access insights into scale hotspots, trial runs, test trends, and more. Be confident that your implementation scales and adheres to your performance SLAs.

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

**Who:** This service is available after approval from Salesforce as part of the STS (Scale Testing Service) platform pilot. Users opt to use Scale Testing Service and are subject to the applicable terms provided at [Agreements and Terms](#).

**How:** To get access, contact your customer success representative or account executive. Enable Scale Testing Service features in test environments on first party infrastructure (1P) and Hyperforce.

From Setup, in the Quick Find box, enter *Performance*, and then select **Performance Testing** to view all three tabs under Performance Assistant.

## 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

Apex Unit test data is no longer available in AppExchange App Analytics. You're now limited to how many Trialforce templates per Trialforce Source Organization (TSO) that you can create. Voluntarily request AppExchange security re-reviews on your solutions. Salesforce Code Analyzer scan reports are now required with AppExchange managed package security reviews.

### IN THIS SECTION:

#### [Custom Object CRUD Data from Apex Unit Tests Is No Longer Available in AppExchange App Analytics](#)

Create, read, update, and delete (CRUD) data from Apex tests on packaged `CustomObject` components is no longer included in package usage logs and package usage summaries.

#### [Understand Trialforce Template Limits](#)

To better utilize capacity and support growth, you can create up to 10 Trialforce templates per Trialforce Source Organization (TSO). TSOs with more than 10 templates must delete the excess templates before creating new ones. Partners that require additional templates can contact Salesforce Partner Support.

#### [AppExchange Security Re-Reviews Available Upon Request](#)

In addition to the periodic security re-reviews that AppExchange conducts on your solutions, you can now request a re-review on demand.

#### [Salesforce Code Analyzer Scan Reports Now Required with Certain AppExchange Security Reviews](#)

Before you can publicly list your managed package on AppExchange, it must pass a security review. Now you must scan your code with Salesforce Code Analyzer, then upload your scan reports to your submission in the AppExchange Security Review Wizard.

## Custom Object CRUD Data from Apex Unit Tests Is No Longer Available in AppExchange App Analytics

Create, read, update, and delete (CRUD) data from Apex tests on packaged `CustomObject` components is no longer included in package usage logs and package usage summaries.

**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.

## Understand Trialforce Template Limits

To better utilize capacity and support growth, you can create up to 10 Trialforce templates per Trialforce Source Organization (TSO). TSOs with more than 10 templates must delete the excess templates before creating new ones. Partners that require additional templates can contact Salesforce Partner Support.

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

**Who:** Users with Modify All Data permission.

SEE ALSO:

[ISVforce Guide: Create a Trialforce Template](#)

## AppExchange Security Re-Reviews Available Upon Request

In addition to the periodic security re-reviews that AppExchange conducts on your solutions, you can now request a re-review on demand.

**Where:** This change applies to all private and publicly listed AppExchange solutions that have passed an initial security review.

**Who:** To use the Partner Console, you must have the Manage Listing permission in the Salesforce Partner Community.

**How:** From the Salesforce Partner Community, to launch the Partner Console, click **Publishing**. To access security re-reviews, click **Technologies** and then **Solutions**.

SEE ALSO:

[ISVforce Guide: Periodic Security Re-Reviews on AppExchange](#)

## Salesforce Code Analyzer Scan Reports Now Required with Certain AppExchange Security Reviews

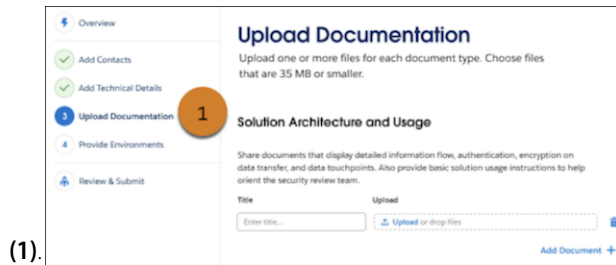
Before you can publicly list your managed package on AppExchange, it must pass a security review. Now you must scan your code with Salesforce Code Analyzer, then upload your scan reports to your submission in the AppExchange Security Review Wizard.

**Where:** This change applies to all private and publicly listed AppExchange managed packages.

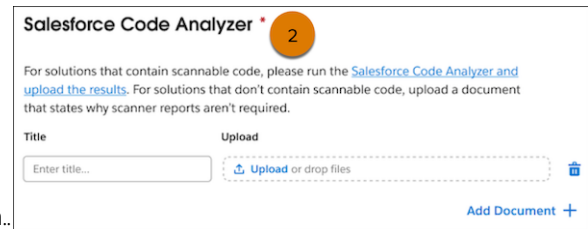
**Who:** To use the AppExchange Partner Console and AppExchange Security Review Wizard, you must have the Manage Listing permission in the Salesforce Partner Community.

**How:** To access the AppExchange Security Review Wizard, first log in to the Salesforce Partner Community. Then click **Publishing**, and go to **Technologies Solutions**. Locate the managed package version that you plan to, or have already, submitted for security review. To open the wizard, click **Start Review** or **Edit Review**.

To upload your Salesforce Code Analyzer scans, click **Upload Documentation**



(1).



Go to the Salesforce Code Analyzer section (2) and upload your documentation..

SEE ALSO:

[Developer Documentation: Salesforce Code Analyzer](#)

[ISVforce Guide: How Does AppExchange Security Review Work?](#)

[ISVforce Guide: Scan Your Solution with Salesforce Code Analyzer](#)

## 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 CareBarrier, CareDeterminate, CareObservation, CartDeliveryGroup, CartItem, CartItemPriceAdjustment, CartTax, CartValidationOutput, PersonEducation, MemberPlan, WebCart, WebCartAdjustmentBasis, and WebCartAdjustmentGroup objects.

## Receive Change Event Notifications for More Objects

With Change Data Capture, you can now receive notifications of record changes for the CareBarrier, CareDeterminate, CareObservation, CartDeliveryGroup, CartItem, CartItemPriceAdjustment, CartTax, CartValidationOutput, PersonEducation, MemberPlan, WebCart, WebCartAdjustmentBasis, and WebCartAdjustmentGroup 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

Track the publishing of platform events, and get enhanced event usage metrics.

## IN THIS SECTION:

[Track the Publishing of Platform Events with Apex Publish Callbacks \(Generally Available\)](#)

Get the final result of an `EventBus.publish` call through an Apex publish callback that you implement. After you receive the final publish result, you can decide what action to take, such as attempting to republish failed events. Because event publishing is asynchronous, the publish operation is queued in Salesforce. When no immediate errors are returned and when resources become available, the system carries out the queued publish call. Without the callback, you can get only the intermediate queueing result in `Database.SaveResult` of an `EventBus.publish` call, not the final result.

[Get Enhanced Event Usage Metrics](#)

Aggregate usage data by event name, and determine which event is using up more of your allocations. Group usage by client to find out how many clients subscribed to a particular event and how your event delivery usage is shared among clients. Use granular time aggregations of daily, hourly, and 15-minute periods to slice and dice usage data. When you query `PlatformEventUsageMetric`, you can use these new fields: `EventName`, `Client`, `TimeSegment`, `EventType`, and `UsageType`.

## Track the Publishing of Platform Events with Apex Publish Callbacks (Generally Available)

Get the final result of an `EventBus.publish` call through an Apex publish callback that you implement. After you receive the final publish result, you can decide what action to take, such as attempting to republish failed events. Because event publishing is asynchronous, the publish operation is queued in Salesforce. When no immediate errors are returned and when resources become available, the system carries out the queued publish call. Without the callback, you can get only the intermediate queueing result in `Database.SaveResult` of an `EventBus.publish` call, not the final result.

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

**How:** To track failed event publishes, write an Apex class and implement the `EventBus.EventPublishFailureCallback` interface. If the asynchronous publish operation fails, the `onFailure` method is invoked. In the implemented `onFailure` method, you can write logic to act in response to the final result of the publishing operation. The `result` parameter contains the `EventUuid` field values for each failed event, but doesn't contain the data for the event. Use the `getEventUuids` method to correlate the failure results with the published events.

```
public class FailureCallback implements EventBus.EventPublishFailureCallback {

    public void onFailure(EventBus.FailureResult result) {
        // Your implementation.
        // Get event UUIDs from the result
        List<String> eventUuids = result.getEventUuids();
        // ...
    }
}
```

To track successful event publishes, write an Apex class and implement the `EventBus.EventPublishSuccessCallback` interface. If the asynchronous publish operation succeeds, the `onSuccess` method is invoked. In the implemented `onSuccess` method, you can write logic to act in response to the final result of the publishing operation.

```
public class SuccessCallback implements EventBus.EventPublishSuccessCallback {

    public void onSuccess(EventBus.SuccessResult result) {
        // Your implementation.
        // Get event UUIDs from the result
        List<String> eventUuids = result.getEventUuids();
        // ...
    }
}
```

```
}  
}
```

Because most publish calls typically succeed, processing successful event publishes isn't likely a concern. A large volume of events can be published successfully, so watch the performance and Apex limits when processing results.

#### SEE ALSO:

[Platform Events Developer Guide: Get the Result of Asynchronous Platform Event Publishing with Apex Publish Callbacks](#)

[Apex Reference Guide: System.Quiddity Enum: PLATFORM\\_EVENT\\_PUBLISH\\_CALLBACK](#)

## Get Enhanced Event Usage Metrics

Aggregate usage data by event name, and determine which event is using up more of your allocations. Group usage by client to find out how many clients subscribed to a particular event and how your event delivery usage is shared among clients. Use granular time aggregations of daily, hourly, and 15-minute periods to slice and dice usage data. When you query PlatformEventUsageMetric, you can use these new fields: `EventName`, `Client`, `TimeSegment`, `EventType`, and `UsageType`.

**Where:** This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions. This feature isn't available in Non-Hyperforce Public Cloud, Government Cloud, and Hyperforce instances.

**When:** This feature is available as of June 22, 2023.

**How:** Before you can use this feature, enable it in Metadata API using PlatformEventSettings in API version 58.0 and later.

This example query returns hourly event usage for delivered events from April 1 through April 2 in UTC time. The query aggregates the results into 1-hour intervals as specified by the `TimeSegment` field. Results are grouped per event and client because the `EventName` and `Client` fields are specified in the SELECT statement.

```
SELECT EventName, Client, Value, StartDate, EndDate  
FROM PlatformEventUsageMetric  
WHERE TimeSegment='Hourly'  
AND UsageType='DELIVERY'  
AND StartDate >= 2023-04-01T00:00:00.000Z  
AND EndDate <= 2023-04-02T00:00:00.000Z
```

#### SEE ALSO:

[Platform Events Developer Guide: Get Enhanced Usage Metrics](#)

## Event Bus

Create and manage event relays in Setup. Also, use event relays with Platform Shield Encryption.

#### IN THIS SECTION:

[Integrate Real-Time Events with Amazon EventBridge with Point and Click](#)

Easily create and manage your event relays in the new Event Relays page in Setup. You can manage status, monitor errors, and make edits. Previously, you could create and manage event relays only through the API. Now you can create event relays in the UI. Event relays send platform events and change data capture events from Salesforce to Amazon EventBridge.

### [Send Encrypted Events to Amazon EventBridge](#)

Event Relay now supports Salesforce orgs with Shield Platform Encryption enabled. You can send platform events and change data capture events encrypted at rest with Shield Platform Encryption to Amazon EventBridge. Previously, Event Relay didn't support events encrypted at rest.

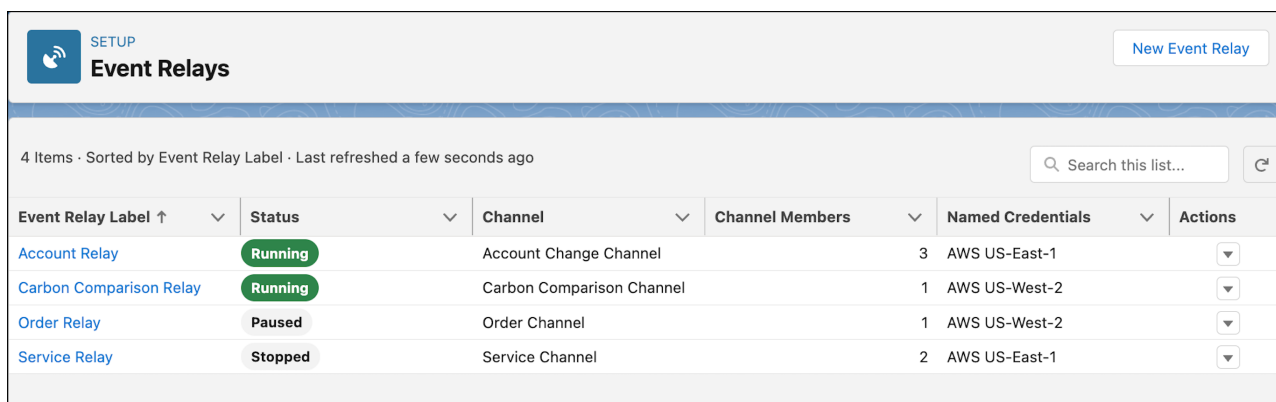
## Integrate Real-Time Events with Amazon EventBridge with Point and Click

Easily create and manage your event relays in the new Event Relays page in Setup. You can manage status, monitor errors, and make edits. Previously, you could create and manage event relays only through the API. Now you can create event relays in the UI. Event relays send platform events and change data capture events from Salesforce to Amazon EventBridge.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions. Event Relay isn't available in Non-Hyperforce Public Cloud, Government Cloud, and Hyperforce instances.

**How:** To create an event relay, from Setup, in the Quick Find box, enter *Event Relays*, and then select **Event Relays**. From the Event Relays page, click **New Event Relay**. Using the event relay creation wizard, provide the requested information.

The Event Relays page shows the event relays that you create.



Event Relay Label ↑	Status	Channel	Channel Members	Named Credentials	Actions
<a href="#">Account Relay</a>	Running	Account Change Channel	3	AWS US-East-1	⌵
<a href="#">Carbon Comparison Relay</a>	Running	Carbon Comparison Channel	1	AWS US-West-2	⌵
<a href="#">Order Relay</a>	Paused	Order Channel	1	AWS US-West-2	⌵
<a href="#">Service Relay</a>	Stopped	Service Channel	2	AWS US-East-1	⌵

SEE ALSO:

[Event Relay Documentation](#)

[Developer Blog Post: Salesforce Event Relay is Generally Available](#)

## Send Encrypted Events to Amazon EventBridge

Event Relay now supports Salesforce orgs with Shield Platform Encryption enabled. You can send platform events and change data capture events encrypted at rest with Shield Platform Encryption to Amazon EventBridge. Previously, Event Relay didn't support events encrypted at rest.

**Where:** This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions. Event Relay isn't available in Non-Hyperforce Public Cloud, Government Cloud, and Hyperforce instances.

SEE ALSO:

[Platform Events Developer Guide: Encrypting Platform Event Messages at Rest in the Event Bus](#)

[Change Data Capture Developer Guide: Change Events for Encrypted Salesforce Data](#)

[Event Relay Documentation](#)

## New and Changed Items for Developers

Learn what's new and changed with objects, calls, classes, components, commands, and more to help 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 58.0.

## 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 changed components.

[New and Changed Modules for Lightning Web Components](#)

Do more with Lightning web components by using modules.

[New and Changed Directives for Lightning Web Components](#)

Add dynamic behavior to an HTML template with directives.

[New and Changed Aura Components](#)

Build UI easily with these changed components.

## New and Changed Lightning Web Components

Build UI easily with these changed components.

### Changed Lightning Web Components

These components have changed.

#### **lightning-card**

These attributes are new.

- `hideHeader`—Hides the title header of the card when set to `true`. Requires you to set the `label` attribute to supplement the non-rendered header.
- `label`—Specifies assistive text for the card. The assistive text label renders if a card title isn't provided or the `hideHeader` attribute is set to `true`.



**lightning-icon**

Icons sourced from the Salesforce Lightning Design System have changed to meet WCAG 2.1 accessibility standards. Some icon images sourced with the `icon-name` attribute have visual changes. For the list of affected icons, see [See Improved Color Contrast in UI Elements](#).

**lightning-tree-grid**

This attribute is new.

- `privatetreegridcelltoggle`—Enables the ability to add a display value to the primitive tree.

**Accessibility Changes to Lightning Web Components**

The heading tags for some components now have an `aria-level` attribute, which can be used to differentiate heading levels for ARIA-compliant screen readers. This attribute overrides the tag's level for only screen reader users. In this example, the header text appears as an H3 heading, but for screen reader users, it's an H4.

```
<h3 aria-level="4">Header text</h3>
```

These components now support the `aria-level` attribute for heading tags.

- `lightning-accordion`
- `lightning-card`
- `lightning-vertical-navigation`
- `lightning-tree-grid`

SEE ALSO:

[Component Library](#)

**New and Changed Modules for Lightning Web Components**

Do more with Lightning web components by using modules.

**New Modules**

These modules are now available.

**lightning/refresh**

This module provides access to the RefreshView API, which enables a standard way to refresh component data in LWC and Aura.

The `lightning/refresh` module also replaces `force:refreshView` for Aura.

`lightning/refresh` includes this event.

- `RefreshEvent`—Signals a container to begin the refresh process.

`lightning/refresh` includes these methods.

- `registerRefreshContainer()`—Registers a container to receive the dispatched refresh event and begin the refresh process when the event is received.
- `unregisterRefreshContainer()`—Stops a container from receiving refresh events.
- `registerRefreshHandler()`—Registers a component's refresh handler method to be included in a refresh process.
- `unregisterRefreshHandler()`—Removes a component's refresh handler method from the refresh process.

`lightning/refresh` includes these enum constants that represent the overall status of the refresh process.

- `RefreshComplete`—Refresh process has completed on all descendant refresh handler nodes.
- `RefreshCompleteWithError`—Refresh process has completed on descendant refresh handler nodes, but some children have reported an error.
- `RefreshError`—Refresh process couldn't run on descendant refresh handler nodes.

For more information, see [Synchronize Component Data Without a Page Refresh Using RefreshView API \(Generally Available\)](#).

### **lightning/toastContainer (Beta)**

Manage and position a list of toast components, such as `lightning/platformShowToastEvent`. This component is only available for LWR sites.

For more information, see [Manage Toast Notifications with a Toast Container \(Beta\)](#) on page 284.

## Changed Modules

These modules have new, changed, or deprecated wire adapters and JavaScript functions.

### **lightning/modal**

This attribute has changed.

- `size`— Added a `full` value, which resizes the modal to the full width and height of the viewport on screens with 767 pixels or less, like mobile devices. On screens with 768 pixels or more, like desktop monitors or tablets, a `size="full"` modal acts as `size="large"`.

### **lightning/uiGraphQLApi (Beta)**



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

This module includes a new function.

- `refreshGraphQL(result)` —Enables you to control when you want the query to re-run, such as in response to a button click or via JavaScript. Call this function to resend a GraphQL query request to the server and update the client-side stored result set.

This module includes a changed wire adapter.

- `graphql`—The usage of metaschema directives in the GraphQL wire adapter has been deprecated. To work with the wire adapter, remove the metaschema directives from the GraphQL API queries in your JavaScript code.

The GraphQL wire adapter now provides referential integrity without metaschema directives or object and field imports. The wire adapter verifies your objects and fields, ensuring that your code works even if objects and fields are renamed. It also prevents object or field deletion when the wire adapter references it from the code.

If you are using the GraphQL wire adapter from the previous release, remove the metaschema directive in **bold** from an object:

```
Account(where: { Name: { like: "Account1" } }) @category(name: "recordQuery")
```

Similarly, remove the metaschema directive in **bold** from a field:

```
Name @category(name: "StringValue")
```

The GraphQL wire adapter doesn't currently support these use cases.

- Custom objects with parent or child relationships
- Deploying a custom object in the same package as the Lightning web component that references it. We recommend that you deploy the custom object first.
- Experience Cloud sites
- Dynamic construction of GraphQL queries at runtime

- Referencing objects and fields that are defined in a namespaced package
- Using GraphQL from a component in a namespaced package
- Using variables in directives such as `@skip` and `@include`

**lightning/uiRecordApi**

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.

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 supported. Consider requesting specific or optional fields by using the `getRecord` and `getRecords` wire adapters instead. To load object information for lookup records, use `getRecord`, followed by `getObjectInfo` for the primary record, and `getObjectInfos` for all lookup field object information.
- `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**

This module includes a changed wire adapter.

- `getRelatedListInfo`—This wire adapter now returns information about whether users can apply quick filters to related lists with the `filterable` property.

**lightning/uiListsApi**

This module includes a changed wire adapter.

- `getListInfoByName`—This wire adapter now returns more information about lookup fields in a list view with the `lookupId` property on the List Column response body.

**lightning/analyticsWaveApi**

This module includes a new function.

- `validateWaveTemplate(templateIdOrApiName, templateValidateParam)`—Enables you to validate your CRM Analytics app template to ensure that it passes lint rules. Call this function to validate your template and then package and share it.

**SEE ALSO:**

[Component Library](#)

[Manage Toast Notifications with a Toast Container \(Beta\)](#)

## New and Changed Directives for Lightning Web Components

Add dynamic behavior to an HTML template with directives.

### New Directives

This directive is now available.

**lwc:spread={childProps}**

Spreads properties to a child component, enabling elements to accept an object's keys bound as properties at runtime. Define your object with keys as the property names and values.

```
// app.js
import { LightningElement } from 'lwc';

export default class extends LightningElement {
  childProps = { name: 'Codey Bear', country: 'USA' };
}
```

Apply `childProps` as a property to the child component.

```
<!-- app.html -->
<template>
  <c-child lwc:spread={childProps}></c-child>
</template>
```

In your child component, use the properties in your template.

```
<!-- child.html -->
<template>
  <p>Name: {name}</p>
  <p>Country : {country} </p>
</template>
```

To expose your properties to the parent component, use the `@api` decorator.

```
// child.js
import { LightningElement, api } from 'lwc';

export default class Child extends LightningElement {
  @api name;
  @api country;
}
```

You can use only one instance of `lwc:spread` on an element. Additionally, HTML attributes are reflected on the child component. For example, passing in `spanProps = { className: 'spanclass', id: 'myspan' }` on the parent component results in the child component rendering as `<c-child class="spanclass" id="mySpan"></c-child>`.

SEE ALSO:

[Lightning Web Components Developer Guide: HTML Template Directives \(can be outdated or unavailable during release preview\)](#)

## New and Changed Aura Components

Build UI easily with these changed components.

### Changed Aura Components

This component has changed.

**wave: sdk**

This component includes new functions for validating a CRM Analytics app template.

- `getTemplateLint`—Retrieves the lint score for the template.

- `runTemplateLint`—Runs lint validation for the template.
- `validateTemplate`—Runs org readiness validation for the template.

SEE ALSO:

[Component Library](#)

[Lightning Web Components Developer Guide](#)

[Lightning Aura Components Developer Guide](#)

## Apex: New and Changed Items

These classes, enums, and interfaces are new or have changes.

For more information on these enhancements, see the [Apex Developer Guide](#) and the [Apex Reference Guide](#).

IN THIS SECTION:

[Auth Namespace](#)

The Auth namespace has these new or changed classes, methods, interfaces, enums, or exceptions.

[DataWeave Namespace](#)

The DataWeave namespace has these new or changed classes, methods, interfaces, enums, or exceptions.

[EventBus Namespace](#)

The EventBus namespace has these new or changed classes, methods, interfaces, enums, or exceptions.

[Messaging Namespace](#)

The Messaging 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

#### Determine if the Headless Registration Flow is enabled

Use the new `getHeadlessRegistrationEnabled()` method in the `Auth.AuthConfiguration` class.

#### Determine if the Headless Forgot Password Flow is enabled

Use the new `getHeadlessForgotPasswordEnabled()` method in the `Auth.AuthConfiguration` class. The `getHeadlessForgotPasswordEnabled()` method is equivalent to the `getHeadlessFrgtPswEnabled()` method. As a best practice, Salesforce recommends that you use `getHeadlessForgotPasswordEnabled()` rather than `getHeadlessFrgtPswEnabled()`, which will be deprecated in a future release.

## New Interfaces

### Create customer and partner users during the Headless Registration Flow

Use the new `Auth.HeadlessSelfRegistrationHandler` interface.

## DataWeave Namespace

The DataWeave namespace has these new or changed classes, methods, interfaces, enums, or exceptions.

## New or Changed Methods in Existing Classes

### Specify a namespace name while creating a DataWeave script

Use the new `DataWeave.createScript(namespace, scriptName)` method overload. If the namespace name is null, the caller namespace is used. If the namespace name is empty, the org namespace is used.

## EventBus Namespace

The EventBus namespace has these new or changed classes, methods, interfaces, enums, or exceptions.

## New or Changed Methods in Existing Classes

### When testing Apex publish callbacks, simulate the failed publishing of platform event messages

Use the new `fail()` method in the `TestBroker` class.

## New Interfaces

### Track platform event messages that failed to be published via `EventBus.publish`

Use the new `EventPublishFailureCallback` interface.

### Track platform event messages that were successfully published via `EventBus.publish`

Use the new `EventPublishSuccessCallback` interface.

### Get the result of an Apex publish callback when the event publishing fails

Use the `FailureResult` interface as the parameter type in the `onFailure` method of the `EventPublishFailureCallback` interface.

### Get the result of an Apex publish callback when the event publishing succeeds

Use the `SuccessResult` interface as the parameter type in the `onSuccess` method of the `EventPublishSuccessCallback` interface.

## Changed Interfaces

## Messaging Namespace

The Messaging namespace has these new or changed classes, methods, interfaces, enums, or exceptions.

## New Classes

### Retrieve authentication result response data for inbound emails

Use the new `InboundEmail.AuthenticationResult` class with these properties: `method` denotes the authentication method used for the security check, `result` is the authentication result, and `authenticationResultFields` is a list of `InboundEmail.AuthenticationResultField` objects.

**Retrieve authentication result field data for inbound emails**

Use the new `InboundEmail.AuthenticationResultField` class with these properties: `name` denotes the field name and `value` denotes the field value.

**New or Changed Methods in Existing Classes****Retrieve authentication results for inbound emails**

Use the new `authenticationResults` property in the `InboundEmail` class.

**System Namespace**

The `System` namespace has these new or changed classes, methods, interfaces, enums, or exceptions.

**New Classes****Get current and maximum stack depths and minimum queueable delay for Queueable transactions and determine if maximum stack depth is set**

Use these methods in the `System.AsyncInfo` class: `getCurrentQueueableStackDepth()`, `getMaximumQueueableStackDepth()`, `getMinimumQueueableDelayInMinutes()`, and `hasMaxStackDepth()`.

**Define the maximum queueable stack depth and the minimum queueable delay while enqueueing Queueable jobs**

Use these properties in the `System.AsyncOptions` class: `delayMaximumQueueableStackDepth` and `MinimumQueueableDelayInMinutes`. The `System.AsyncOptions` class is used in the new `System.enqueueJob()` overload.

**Retrieve the label for a default language setting or for a language and namespace**

Use the `get(namespace, label, language)` method in the `System.Label` class.

**Check if translation exists for a label and language in a namespace**

Use the `translationExists(namespace, label, language)` method in the `System.Label` class.

**New or Changed Methods in Existing Classes****Specify a minimum queueable delay or a maximum stack depth while enqueueing jobs**

Use the new `System.enqueueJob(queueable, asyncOptions)` method overload with the `System.AsyncOptions` properties set to appropriate values.

**Changed Enums****Get the Execution Type for Apex Publish Callbacks in `System.Request`**

The `System.Quiddity` enum has this new value: `PLATFORM_EVENT_PUBLISH_CALLBACK`.

**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 details of an order summary for a guest buyer or registered buyer (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.

- `lookupOrderSummary(webstoreId, effectiveAccountId, orderSummaryLookupInput)`
- `lookupOrderSummary(webstoreId, effectiveAccountId, fields, orderSummaryLookupInput)`
- `lookupOrderSummary(webstoreId, effectiveAccountId, fields, excludeLineItems, excludeDeliveryGroups, excludeAdjustmentAggregates, excludeAdjustments, deliveryGroupId, orderSummaryLookupInput)`

New input class: `ConnectApi.OrderSummaryLookupInputRepresentation`

New output classes: `ConnectApi.OrderSummaryLookupOutputRepresentation`

These new methods are in the `ConnectApi.CommerceCart` class.

#### Create or update an inventory reservation in the cart (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.


- `upsertInventoryReservation(webstoreId, activeCartOrId, effectiveAccountId, cartInventoryReservationInput)`

New input class: `ConnectApi.CartInventoryReservationInputRepresentation`

New output classes: `ConnectApi.CartInventoryReservationOutputRepresentation`



**Delete an inventory reservation in the cart (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.

- `deleteInventoryReservation(webstoreId, activeCartOrId, effectiveAccountId)`

These new and changed methods are in the `ConnectApi.CommerceCatalog` class.

**Get products without pricing information**

- `getProduct(webstoreId, productId, effectiveAccountId, fields, mediaGroups, excludeFields, excludeMedia, excludePrimaryProductCategory, excludeVariationInfo, excludeAttributeSetInfo, excludeQuantityRule, excludeProductSellingModels)`

This method is available in version 57.0 but was previously undocumented.

- `getProducts(webstoreId, effectiveAccountId, ids, skus, fields, excludeMedia)`
- `getProducts(webstoreId, effectiveAccountId, ids, skus, fields, excludeMedia, excludePrices)`

This method no longer returns pricing information regardless of the `excludePrices` parameter. To get pricing information for products in version 58.0 and later, use the `ConnectApi.CommerceStorePricing` class.

These new methods are in the `ConnectApi.CommercePromotions` class.

**Get coupon code redemption usage to revert a previously redeemed coupon code**

- `decreaseRedemption(couponCodeRedemption)`

New input class: `ConnectApi.CouponCodeRedemptionInput`

New output class: `ConnectApi.CouponCodeRedemptionCollection`

**Get coupon code redemption addition (increase) usage**

- `increaseRedemption(couponCodeRedemption)`

New input class: `ConnectApi.CouponCodeRedemptionInput`

New output class: `ConnectApi.CouponCodeRedemptionCollection`

These new methods are in the `ConnectApi.CommerceSearch` class.

**Get product suggestions for search term queries.**

- `getSuggestions(webstoreId, effectiveAccountId, searchTerm, maxResults, includeSuggestedProducts, maxSuggestedProducts)`

This method isn't supported in version 58.0 and later. Use the new `getSuggestions` method listed above to get a collection of published contents for a channel.

- `getSuggestions(webstoreId, effectiveAccountId, searchTerm, maxResults)`

This new method is in the new `ConnectApi.CommerceSearchConnectFamily` class.

**Search products by search term or category**

- `searchProducts(webstoreId, searchTerm, categoryId, sortRuleId, grouping, fields, refinements, pageParam, pageSize, effectiveAccountId, includeQuantityRule)`

New output class: `ConnectApi.CommerceProductSearchResults`

This method was incorrectly documented in the `ConnectApi.CommerceSearch` class.

## Data Cloud

This new method is in the `ConnectApi.CdpCalculatedInsight` class.

### Get a page of calculated insights

- `getCalculatedInsights(definitionType, batchSize, offset, orderBy, dataspace, pageToken)`

This method was new in version 57.0 but was previously undocumented.

This new method is in the `ConnectApi.CdpSegment` class.

### Get segment members

- `getSegmentMembers(limit, offset, orderBy, segmentApiName, filters, fields)`

New output class: `ConnectApi.CdpSegmentMemberOutput`

## Named Credentials

These new methods are in the `ConnectApi.NamedCredentials` class.

### Create an external credential

- `createExternalCredential(requestBody)`

New input class: `ConnectApi.ExternalCredentialInput`

### Create a named credential

- `createNamedCredential(requestBody)`

New input class: `ConnectApi.NamedCredentialInput`

### Refresh a named credential

- `createCredential(requestBody, action)`

## Salesforce CMS

These new methods are in the `ConnectApi.ManagedContentDelivery` class.

### Get a collection of published contents for a channel

- `getManagedContentsForChannel(channelId, managedContentIds, contentKeys, contentTypeFQN, language, publishStartDate, publishEndDate, includeContentBody, referenceDepth, expandReferences, referencesAsList, pageParam, pageSize, showAbsoluteUrl)`

This method isn't supported in version 58.0 and later. Use the new `getManagedContentsForChannel` method listed above to get a collection of published contents for a channel.

- `getManagedContentsForChannel(channelId, managedContentIds, contentKeys, contentTypeFQN, language, publishStartDate, publishEndDate, includeContentBody, referenceDepth, expandReferences, referencesAsList, pageParam, pageSize)`

### Get a collection of published contents for an Experience Cloud site

- `getManagedContentsForSite(siteId, managedContentIds, contentKeys, contentTypeFQN, language, publishStartDate, publishEndDate, includeContentBody, referenceDepth, expandReferences, referencesAsList, pageParam, pageSize, showAbsoluteUrl)`

This method isn't supported in version 58.0 and later. Use the new `getManagedContentsForSite` method listed above to get a collection of published contents for an Experience Cloud site.

- `getManagedContentsForSite(siteId, managedContentIds, contentKeys, contentTypeFQN, language, publishStartDate, publishEndDate, includeContentBody, referenceDepth, expandReferences, referencesAsList, pageParam, pageSize)`

## Changed Connect in Apex Input Classes

These input classes have changes.

### Commerce

#### **ConnectApi.CartInput**

This input class has this new property.

- `orderOwnerId`—ID of the owner of the order.

### Data Cloud

#### **ConnectApi.CdpIdentityResolutionMatchCriterion**

This input class has this new property.

- `caseSensitiveMatch`—Specifies whether the criterion match is case sensitive (`true`) or not (`false`). Available only when matching is based on the [party identifier](#).

### Named Credentials

#### **ConnectApi.CredentialValueInput**

This input class has this new property.

- `revision`—Revision number of a short-lived credential.

#### **ConnectApi.ExternalCredentialHeaderInput**

This input class is renamed `ConnectApi.CredentialHeaderInput`.

## Changed Connect in Apex Output Classes

These output classes have changes.

### Commerce

#### **ConnectApi.CartSummary**

This output class has this new property.

- `orderOwnerId`—ID of the owner of the order.

#### **ConnectApi.ProductDetail**

This output class no longer returns this property.

- `entitlement`

This change is available in version 57, but was previously undocumented.

#### **ConnectApi.ProductOverview**

This output class no longer returns this property.

- `prices`

## Data Cloud

### **ConnectApi.CdpCalculatedInsightActionRunResponseRepresentation**

This output class is now called

`ConnectApi.CdpDataCloudCalculatedInsightStandardActionResponseRepresentation`. This name change is available in version 57.0, but was previously undocumented.

### **ConnectApi.CdpCalculatedInsightPageData**

This output class has these new properties:

- `currentPageToken`—Token identifying the current page.
- `currentPageUrl`—Connect REST API URL identifying the current page.
- `nextPageToken`—Token identifying the next page, or `null` if there isn't a next page.
- `nextPageUrl`—Connect REST API URL identifying the next page, or `null` if there isn't a next page.
- `previousPageToken`—Token identifying the previous page, or `null` if there isn't a previous page.
- `previousPageUrl`—Connect REST API URL identifying the previous page, or `null` if there isn't a previous page.

These properties are available in version 57.0 but were previously undocumented.

### **ConnectApi.CdpIdentityResolutionMatchCriterionOutput**

This output class has this new property.

- `caseSensitiveMatch`—Specifies whether the criterion match is case sensitive (`true`) or not (`false`). Available only when matching is based on the [party identifier](#).

### **ConnectApi.CdpSegmentOutput**

This output class has this new property.

- `segmentMembershipDmo`—Segment membership tables.

## Named Credentials

### **ConnectApi.CredentialCustomHeader**

This output class has this new property.

- `id`—ID of the customer header parameter.

### **ConnectApi.CredentialValue**

This output class has this new property.

- `revision`—Revision number of a short-lived credential.

### **ConnectApi.ExternalCredential**

This output class has these new properties.

- `id`—External credential ID.
- `url`—Connect REST API URL for the external credential.

### **ConnectApi.ExternalCredentialParameter**

This output class has these new properties.

- `parameterDescription`—Parameter description.
- `parameterId`—Parameter ID.

### **ConnectApi.ExternalCredentialPrincipal**

This output class has these new properties.

- `id`—ID of the external credential principal.
- `parameters`—List of external credential parameters.
- `principalAccess`—List of access entities associated with the external credential principal.
- `sequenceNumber`—Sequence number of the external credential principal.

**ConnectApi.NamedCredential**

This output class has these new properties.

- `calloutOptions`—Callout options for the named credential.
- `calloutUrl`—URL of the named credential in a callout.
- `customHeaders`—Custom HTTP headers for the named credential.
- `externalCredentials`—External credentials used by the named credential.
- `id`—Named credential ID.
- `networkConnection`—PrivateConnect outbound network connection for the named credential.
- `parameters`—Named credential parameters.
- `type`—Type of named credential parameter.
- `url`—Connect REST API URL of the named credential.

## Changed Connect in Apex Enums

These enums have changes.

For information about these enums, see ConnectApi Enums in the *Apex Reference Guide*.

**ConnectApi.CredentialAuthenticationProtocol**

This enum has this new value.

- `NoAuth`

**ConnectApi.OrchestrationStepType**

This enum has these new values.

- `ManagedContentVariantSetLockBackgroundStep`
- `ManagedContentVariantSetReadyBackgroundStep`

**ConnectApi.PublishSchedule**

This enum has these new values.

- `One`—Refreshes every hour. Used to rapidly publish UI and DBT-based segments.
- `Four`—Refreshes every four hours. Used to rapidly publish UI and DBT-based segments.

## API: New and Changed Items

Access more data objects and metadata types in API version 58.0.

### 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.

### [Connect REST API](#)

Integrate mobile apps, intranet sites, and third-party web applications with Salesforce using Connect REST API.

### [CRM Analytics REST API](#)

Using the CRM Analytics REST API, run validation on your templates, add compact joins to queries, and use interactions with image, number, and container widgets.

### [Metadata API](#)

Access more metadata using these new and changed Metadata API types.

### [REST API](#)

These calls are changed in API version 58.0

### [Async SOQL Is Being Retired](#)

Async SOQL is retired in Summer '23. Use Bulk API or batch Apex to query big objects.

### [Subscription Management API](#)

Use Subscription Management API to build your self-service B2B solutions.

### [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, and work with more objects.

### [GraphQL API](#)

Analyze query results by using aggregate functions with or without grouping. Get more information about an error from the `errorType` field.

## New and Changed Objects

Access more data through these new and changed standard objects.

### Salesforce Overall

#### **Determine whether an org-wide email address is verified**

Use the new `IsVerified` field on the `OrgWideEmailAddress` object.

#### **Create and query assignments of user profiles to org-wide email addresses**

Use the new `OrgWideEmailAddressSecurity` object.

### Analytics

#### **Track whether dashboard page loads are initial loads or subsequent page updates**

Use the new `IS_INITIAL` field in the Wave Performance Event type of the `EventLogFile` object.

### Commerce

#### **Access information stored during a transaction's lifecycle**

Use the new `PaymentIntent` object.

#### **Copy and send a payment link to a payer via email and text message**

Use the new `PaymentLink` object.

**Show customer names in Order Payment Summaries**

Use the new `BillingFirstName`, `BillingLastName`, and `BillingName` fields on the `AlternativePaymentMethod` object.

**Track each coupon code redemption**

Use the new `CouponCodeRedemption` object.

**View details about a Salesforce Payments merchant account, such as processing status and country of origin**

Use the new fields `PaymentStatus`, `PayoutStatus`, and `CountryIsoCode` on the `MerchantAccount` object.

**Create SEO-friendly URL slugs for Product and Category pages**

Previously available as a pilot feature in API version 57.0, the `ObjectRelatedUrl` object is now available as a beta 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](#).

**Store OrderSummary related information regarding the context of the order such as inventory reservation details**

Use the new `OrderSummaryAdditionalInfo` object.

**View details about a payment gateway associated with a Salesforce Payments merchant account**

Use the new fields `ProviderAccount`, `PaymentStatus`, `PayoutStatus`, `Mode`, and `GatewayType` on the `PaymentGateway` object.

**Track the status of a specific payment in the Payments Workspace**

Use the new `PaymentIntent` object.

**Determine whether a promotion is non-exclusive or exclusive**

Use the new `ExclusivityType` field on the `Promotion` object.

**Allow customers to save their method of payment during checkout to use the same method for future transactions**

Use the new `SavedPaymentMethod` object.

**Enable guest cart and checkout access for stores created with an LWR template**

Use the `OptionsGuestCartEnabled` and `OptionsGuestCheckoutEnabled` fields on the `WebStore` object.

**Determine which payment methods are available to customers during checkout at a given merchant**

Use the new `MerchAccPaymentMethodSet` and `MerchAccPaymentMethodType` objects.

**View coupons that trigger a promotion**

Use the `WebCartAdjustmentBasis` object. Introduced in API version 54.0, this object has been added to the *Object Reference for the Salesforce*

**Get more details about item-level promotions**

Use the `AdjustmentAmountScope` and `AdjustmentBasisReferenceId` fields on the `CartItemPriceAdjustment` object. Introduced in API version 54.0, these fields have been added to the *Object Reference for the Salesforce Platform*.

**Add the CryptoWalletGroup to an allowlist or airdrop**

Use the new `CryptoWalletGroup` object.

**Engage customers with a localized buyer experience**

Use the new objects `WebstoreBuyerGroup`, `BuyerCriteria`, `BuyerGroupBuyerCriteria`, and `BuyerGroupRelatedObject` to support dynamic access to entitlements, price books, and promotions when customers shop in webstores with localized languages and currencies.

**Customization****Select a gender-neutral honorific for a person**

Use the new supported value `Mx.` in the existing `Salutation` field on the `Account`, `CampaignMember`, `Contact`, `Individual`, and `Lead` objects.

## Development

### Get enhanced usage metrics for platform events and change data capture events

Use the fields `Client`, `EventName`, `EventType`, `TimeSegment`, and `UsageType` when you query the `PlatformEventUsageMetric` object.

## Enablement

### Programmatically assign users to enablement programs

Use the new `EnablementProgram`, `LearningItem`, and `LearningItemAssignment` objects.

## Event Monitoring

### Track changes in Lightning page load times in near real time

Use the new `EffectivePageTimeDeviationErrorType`, `EffectivePageTimeDeviationReason`, `HasEffectivePageTimeDeviation`, and `UserAgent` fields on the `LightningUriEvent` and `LightningUriEventStream` real-time events.

### Monitor total API usage in all versions of the Platform SOAP, REST, and Bulk APIs

Use the `API Total Usage` event type. Previously, this event type monitored usage up to version 49 of the Platform APIs. This event type can help identify requests from old and unsupported API versions.

### Check the HTTP status code for Apex Callout events

Use the `STATUS_CODE` field on the `Apex Callout Event Type` to see the HTTP status code of Apex callout responses.

### Identify who's viewing knowledge articles

Use the new `USER_ID_DERIVED` field on the `Knowledge Article View Event` type.

## Experience Cloud

### Create a name for a Salesforce CMS content item

Use the new `Name` field on the existing `ManagedContent` object.

### Enhance the performance of Connect API calls from Lightning web components in enhanced LWR sites

Use the new `OptionsLWRExperienceConnectedAppEnabled` field on the existing `Network` object.



**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](#).

### Disable the standard self-registration components on Aura and Lightning Web Runtime (LWR) sites

Use the new `OptionsDisableStandardRgstrComponent` field on the `NetworkSelfRegistration` object.

### BEHAVIOR CHANGE: Enjoy improved performance of queries against the FeedItem object

SOQL queries on the `FeedItem` object without an `ORDER BY` clause can return records in a different order than in previous versions. For more information on the `ORDER BY` clause, see [ORDER BY](#) in the SOQL and SOSL Reference Developer Guide.

### Track Network Member Group activity.

Use the new `Add`, `Calculated`, `Failed`, `Failed Remove`, and `Remove` `CalculatedAssignmentStatus` field values on the `NetworkMemberGroup` object.

## Field Service

### Add travel time to the bundle's duration

Use the new `DoesAddTravelTime` field on the `ApptBundleConfig` object.



**Configure automatic status changes**

Use the updated fields on the `FieldServiceMobileSettings` object: `AscAutomaticMode`, `AscCancellationTimerInSec`, `AscCompletedStatus`, `AscOnSiteStatus`, `AscRadiusInMeters`, `AscTimeLimitationInMin`, and `AscTravelStatus`.

**Configure optimized image uploads**

Use the new `IsOptimizedImageUploadEnabled` and `OptimizeImageSizeInMb` fields on the `FieldServiceMobileSettings` object.

**Limit location tracking for Appointment Assistant users**

Use the new `IsLimitedLocTrackingEnabled` field on the `FieldServiceMobileSettings` object.

**Indicate that the work can be done remotely**

Use the new `IsOffsiteAppointment` field on the `ServiceAppointment` object.

**Get information on whether a service contract is compliant with its defined outcomes**

Use the new `ContractLineOutcome` object.

**Get information on the data captured for a contract line outcome's key performance indicators**

Use the new `ContractLineOutcomeData` object.

**Revenue****Renew an annual subscription**

Use the new `Annual` value on the `RenewalTermUnit` field on the `Asset` object.

**Price an annual subscription in a quote**

Use the new `Annual` value on the `PricingTermUnit` field on the `QuoteLineItem` object.

**Define an annual subscription in a quote**

Use the new `Annual` value on the `SubscriptionTermUnit` field on the `QuoteLineItem` object. UI label is `Years`.

**Renew a subscription at the last negotiated price**

Use the new `LastNegotiatedPrice` value on the `QuantityIncreasePricingType` field on the `Asset` object.

**Define a main asset's role, such as a bundle or set**

Use the new `AssetRole` field on the existing `AssetRelationship` object.

**Define an associated asset's role, such as a bundle or set**

Use the new `RelatedAssetRole` field on the existing `AssetRelationship` object.

**Create a relationship, such as a bundle relationship, between order items**

Use the new `OrderItemRelationship` object.

**Determine a price adjustment by the volume purchased**

Use the new `Term` value on the `ScheduleType` field on the `PriceAdjustmentSchedule` object.

**Define whether a sales rep can edit a bundle configuration when creating an order or quote**

Use the `ConfigureDuringSale` field on the existing `Product2` object.

**Define whether a product can be sold independently or must be sold as part of a bundle**

Use the `IsSoldOnlyWithOtherProds` field on the existing `Product2` object.

**Designate a product as an add-on to another product**

Use the new `AddOn` value on the `ParentProductRole` field and the new `AddOnComponent` value on the `ChildProductRole` field on the `ProductRelatedComponent` object.

**Designate a product as an add-on in a sales transaction**

Use the new `AddOn` value on the `MainProductRoleCat` field and the new `AddOnComponent` value on the `AssociatedProductRoleCat` field on the `ProductRelationshipType` object.

**Price an annual subscription**

Use the new `Annual` value on the `PricingTermUnit` field on the `ProductSellingModel` object. UI label is `Years`.

**See new reasons that your order has changed**

Use the new supported values `No Change` and `Quantity Amendment` in the existing `Type` field on the `OrderAction` object.

**Create a relationship between an associated product and the main product in a bundle**

Use the new `ProductComponentGroup` object.

**Create a product that can be sold as part of a bundle or set**

Use the new `ProductRelatedComponent` object.

**Check the status of tax and pricing calculations on quotes**

Use the values `CompletedWithPricing`, `CompletedWithoutPricing`, and `CompletedWithTax` for the `CalculationStatus` field on the `Quote` object.

**See the total value of all price adjustments applied to a quote**

Use the new `QuoteAdjustmentGroup` object.

**Identify a related line item in the parent quote**

Use the new `ParentQuoteLineItemId` field on the existing `QuoteLineItem` object.

**Define a sales transaction relationship to an add on component**

Use the new value `AddOnComponent` in the existing `MainSalesTrxnItemShapeRole` field on the `SalesTrxnItemRelationShape` object. Use the new value `AddOnComponent` in the existing `AssociatedSalesTrxnItemRole` field on the `SalesTrxnItemRelationship` object interface.

**See the new stages in your quote's price and tax calculations**

Use the new values `CompletedWithTax`, `PriceCalculationFailed`, `PriceCalculationInProgress`, `PriceCalculationQueued`, `SaveFailedOrIncomplete`, and `Saving` in the existing `CalculationStatus` field on the `Quote` object.

**Identify the group of all price adjustments for a quote**

Use the new `QuoteAdjustmentGroupId` field on the existing `QuoteLinePriceAdjustment` object.

**Indicate that a quote line's discount originates from a system rule**

Use the new supported value `Rule` in the existing `AdjustmentSource` field on the `QuoteLinePriceAdjustment` object.

**Create a relationship, such as a bundle relationship, between order items**

Use the new `QuoteLineRelationship` object.

**See which error records are created when material line items are processed**

Use the new value `MaterialLineGeneration` in the existing `Category` field on the `RevenueTransactionErrorLog` object.

**In a product bundle, indicate whether a line item is the bundle parent or a bundle component**

Use the new `ParentSalesTransactionItem` field on the `SalesTransactionItem` object interface.

**See the month when billing begins for an annual subscription**

Use the new `BillingStartMonth` field on the `BillingScheduleGroup` object.

**Create a relationship, such as a bundle relationship, between sales transaction items**

Use the new `SalesTrxnItemRelationship` object.

**Set the start month when setting up annual pricing for quotes**

Use the `PeriodBoundaryStartMonth` field on the existing `SalesTransactionItem`, `SalesTransactionItemShape`, `QuoteLineItem`, and `OrderItem` objects.

**Define an annual billing period for a sales transaction item**

Use the new value `Annual` for the `BillingFrequency` field on the `SalesTransactionItem`, `SalesTransactionItemShape`, and `QuoteLineItem` objects. Use the new value `Annual` for the `BillingFrequency2` field on the `OrderItem` object.

**REMOVED: The Description field is removed.**

The `Description` field is removed from the `PriceAdjustmentItem` and the `PriceAdjustmentGroup` object interfaces. This field is also removed from the `PriceAdjustmentItemShape` and the `PriceAdjustmentGroupShape` objects.

**Sales****BEHAVIOR CHANGE: Change events that are part of a series in Lightning Experience**

This change impacts the `IsRecurrence2Exception` field on the `Event` object and past and future events in a series in Lightning Experience. When you change a future event, events in the entire series also change. When you change a past event, `IsRecurrence2Exception` is set to `true` and only that past event changes. Previously, when you changed an event that's part of a series, you received an error message.

**Forecast on deals split on an opportunity line item level**

Use the new `OpptyLineItemSplitTypeId` field on the `ForecastingType` object and the new `ForecastedSubObjectId` field on the `ForecastingFact` object.

**Use your own data from external sources in Collaborative Forecasts to forecast based on your needs**

Use the new `ForecastingCustomData` object and the new `ReferenceField` field on the `ForecastingColumnDefinition` object.

**Split credit for a deal on an opportunity line item level**

Use the new `OpportunityLineItemSplit` and `OpptyLineItemSplitType` objects and the new `HasOpportunityLineItemSplit` field on the `OpportunitySplit` object.

**Show the full name of the user whose opportunities are shown by default in the Pipeline Inspection list view**

Use the new `UserId` field on the `PipelineInspectionListView` object.

**Identify a reason why a user's email connection needs attention**

Use the new `RecommendedActionTitle` field on the existing `ActivityUsrConnectionStatus` object.

**Identify actions to take when a user's email connection needs attention**

Use the new `RecommendedActionDescription` field on the existing `ActivityUsrConnectionStatus` object.

**Measure daily engagements of contacts and leads**

Use the new `InboundEngagementsCount` and `OutboundEngagementsCount` fields on the existing `ContactDailyMetric` and `LeadDailyMetric` objects.

**Identify whether Optimal Speaker Separation is enabled on customer calls**

Use the new `IsDiarizationOptIn` field on the existing `VideoCall` and `VoiceCall` objects.

**Identify the transcribed language on customer calls**

Use the new `TranscribedLanguage` field on the existing `VideoCall` and `VoiceCall` objects.

**Manage automated action configurations to automate tasks in High Velocity Sales**

Use the `AutomatedAction`, `AutomatedActionCondition`, and `AutomatedActionParameter` objects. Introduced in API version 57.0, these objects have been added to the *Object Reference for the Salesforce Platform*. In API version 58.0, use the new `AutomatedActionOverride` and `AutomatedActionReminder` objects.

**See more cadence metrics and manage cadence step timing more precisely in High Velocity Sales**

Use the new `ActiveTargets`, `SuccessfulCompletions`, `TotalSteps`, and `TotalTargets` fields on the existing `ActionCadence` object; new picklist values on the existing `RuleType` field on the existing `ActionCadenceRule` object; the new `GoToStepIntervalInMinutes`, `GoToStepIterationLimit`, `IsScheduledDueDateLocked`, `ScheduledDaysUntilDue`, `ScheduledDaysUntilStart`, `ScheduledStartDelayInMinutes`, and

`ScheduledStartTimeInMinutes` fields on the existing `ActionCadenceStep` object; and the new `GoToStepIterationCount` and `ScheduledStartDateTime` fields on the existing `ActionCadenceStepTracker` object.

**REMOVED: The MovedIn and MovedOut picklist values are removed**

The `MovedIn` and `MovedOut` picklist values are removed from the `Metric` field on the `PipelineInspMetricConfig` object.

## Salesforce Feedback Management

**Create a survey- type assessment for sales use cases**

Use the new value `Assessment` in the existing `SurveyType` field on the `Survey` object.

**Capture feedback requests in sales enablement programs**

Use the new value `LearningItemSubmission` in the existing `SubjectEntityType` field on the `SurveySubject` object.

**REMOVED: The Form value for the SurveyType field on the Survey object is removed**

The `SurveyType` field on the `Survey` object no longer supports the `Form` picklist value.

## Salesforce Flow

**View a process's migrated criteria and the resulting migrated flow**

Use the new `ProcessFlowMigration` object.

## Salesforce Scheduler

**Create categories for work types and appointments**

Use the new `AppointmentCategory` object.

**Specify the appointment category that's related to the service appointment**

Use the new `AppointmentCategoryId` field on the `ServiceAppointment` object.

**Define queues for a service territory**

Use the new `Waitlist` object.

**Assign a participant (customer) to a waitlist**

Use the new `WaitlistParticipant`, `WaitlistParticipantFeed`, and `WaitlistParticipantHistory` objects.

**Relate a service resource to a waitlist**

Use the new `WaitlistServiceResource`, `WaitlistServiceResourceFeed`, and `WaitlistServiceResourceHistory` objects.

**Relate a work type to a waitlist**

Use the new `WaitlistWorkType`, `WaitlistWorkTypeFeed`, and `WaitlistWorkTypeHistory` objects.

**Specify the appointment category that's related to the work type**

Use the new `AppointmentCategoryId` field on the `WorkType` object.

## Security, Identity, and Privacy

**Control enablement, access, and security settings for Headless Registration API and Headless Forgot Password API**

Use the new `NetworkAuthApiSettings` object.

**Store the encryption policy status of a tenant**

Use the new `TenantSecurityEncryptionPolicy` object.

**Map external credential principals to permission sets and profiles**

Use the new `ExternalCredentialParameter` value of the existing `SetupEntityType` picklist field on the `SetupEntityAccess` object.

**Monitor logins that use OAuth 2.0 hybrid flows**

Use the new `OAuthClientCredential`, `OAuthCode`, and `OAuthHybridAuthCode` values on the existing `LoginSubType` field of the `LoginHistory` object and the new `oauthclientcredential` value on the existing `LOGIN_SUB_TYPE` field of the `Login Event Type` of the `EventLogFile` object.

**Track a pending status on consent fields for consent management objects**

Use the new supported values `OptInPending` and `OptOutPending` in the existing `PrivacyConsentStatus` field on the `CommSubscriptionConsent`, `ContactPointConsent`, `ContactPointTypeConsent`, and `PartyConsent` objects.

**BEHAVIOR CHANGE: Configure authentication options via API**

The `create()` and `delete()` calls are now supported for the `AuthConfigProviders` object.

**Service****Add a date to get an article reviewed for accuracy**

Use the new `NextReviewDate` field on the `KnowledgeArticleVersion` and `Knowledge__kav` objects.

**Create a Service Catalog item**

Use the new `SvcCatalogCategoryItemDef` object.

**Group Service Catalog items together into a functional area**

Use the new `SvcCatalogCategory` object.

**Associate a Service Catalog item with a category**

Use the `SvcCatalogCategoryItem` object.

**Route work orders with Omni-Channel routing**

Specify a work order in the `WorkItemId` field of a `PendingServiceRouting` or `AgentWork` object.

**Enable new user permissions to update linked articles**

Enable new user permissions to call `update()` on the `LinkedArticle` object.

**REMOVED: The `EmbeddedService` picklist value for the `Context` field on the `IframeWhiteListUrl` object is removed**

The `Context` field on the `IframeWhiteListUrl` object no longer supports the `EmbeddedService` picklist value.

**Send a broadcast communication related to an incident**

Use the new `BroadcastCommAudience` and `BroadcastCommunication` objects. Introduced in API version 56.0, this object has been added to the *Object Reference for the Salesforce Platform*.

**New and Changed Standard Platform Events**

Receive real-time notifications from Salesforce by subscribing to the channels of these new and changed standard platform events.

**Revenue****Get notified when a quote is saved or updated**

Subscribe to `QuoteSaveEvent` to receive notifications when quote records are saved or updated.

**Track errors when credit memos are processed in Subscription Management**

Use the new `ErrorDetails` field on the `CreditInvoiceProcessedEvent`, `CreditMemoProcessedEvent`, `NegInvLineProcessedEvent`, and `VoidInvoiceProcessedEvent` platform events. The `CrMemoProcessErrDtlEvents` field, which used to show error information, is no longer populated in API version 58.0.

**CrMemoProcessErrDtlEvent shows null result in Subscription Management platform events**

The `CrMemoProcessErrDtlEvent` child event is no longer populated in API version 58.0. See the `ErrorDetails` field on the parent events instead.

## Security, Identity, and Privacy

### Track insecure login flows through Real-Time Event Monitoring

Use the new `LoginSubType` field on the `LoginEvent` object and `LoginEventStream` platform event to track usage of user-agent and username-password flows.

### Monitor logins with the Enhanced Transaction Security framework

Use the Authentication Method Reference, Login Subtype, and Login Type conditions on the `LoginEvent` object to create a login event policy.

### Track user actions on files

Use the new `FileAction` field on the `FileEvent` and `FileEventStore` real-time events to track file actions such as downloads, uploads, and previews.

### Track the origin of redirected My Domain hostname calls

Use the new `REFERRER` and `ORIGIN` fields on the `HostnameRedirects` event type. With this change, the value of the existing `MESSAGE` field is always null.

## Connect REST API

Integrate mobile apps, intranet sites, and third-party web applications with Salesforce using Connect REST API.

### IN THIS SECTION:

#### [429 HTTP Error Code Is Available](#)

The `429:Too Many Requests` HTTP error code is available for use in Connect REST API. This error is returned when too many requests are made within a 24-hour period.

#### [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:

[Salesforce Platform API Versions 21.0 Through 30.0 Retirement \(Release Update\)](#)

[ConnectApi \(Connect in Apex\): New and Changed Classes and Enums](#)

[Connect REST API Developer Guide](#)

[Apex Reference Guide: ConnectApi Namespace](#)

## 429 HTTP Error Code Is Available

The `429:Too Many Requests` HTTP error code is available for use in Connect REST API. This error is returned when too many requests are made within a 24-hour period.

**Where:** This change applies to Lightning Experience, Salesforce Classic, and all versions of the mobile app in all editions.

## New and Changed Connect REST API Resources

These resources are new or have changes.

## Commerce

**Create pending order summaries from order summary graphs (generally available)**

Make a POST request to the `/commerce/order-summaries` resource.

Request body: Order Summary Graphs Input

Response body: Order Summary Graphs Output

**Create or update an inventory reservation in the cart (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 PUT request to the new

`/commerce/webstores/webstoreId/carts/cartStateOrId/inventory-reservations` resource.

New request body: Cart Inventory Reservation Input

New response body: Cart Inventory Reservation

**Delete an inventory reservation in the cart (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 DELETE request to the new

`/commerce/webstores/webstoreId/carts/cartStateOrId/inventory-reservations` resource.

**Get product suggestions for search term queries**

Make a GET request to the existing `/commerce/webstores/webstoreId/search/suggestions` resource.

New request parameters: `includeSuggestedProducts` and `maxSuggestedProducts`

**Get search results rules**

Make a GET request to the new `/commerce/management/webstores/webstoreId/search/results-rules` resource.

New response body: Search Results Rules Collection

**Create search results rules**

Make a PUT request to the new `/commerce/management/webstores/webstoreId/search/results-rules` resource.

New request body: Search Results Rule Collection Input.

New response body: Search Results Rules Collection

**Search products by search term or category**

Make a GET request to the new `/commerce/webstores/webstoreId/search/products` resource.

New response body: Commerce Product Search Results

**Get coupon code redemption usage to revert a previously redeemed coupon code**

Make a GET request to the new `/commerce/promotions/actions/decrease-use/coupon-codes` resource.

New request body: Coupon Code Redemption Input

New response body: Coupon Code Redemption Collection

**Get coupon code redemption addition (increase) usage**

Make a GET request to the new `/commerce/promotions/actions/increase-use/coupon-codes` resource.

New request body: Coupon Code Redemption Input

New response body: Coupon Code Redemption Collection

### Distribute picked items to orders in a pick ticket

Make a POST request to the new `/commerce/fulfillment/pick-tickets/actions/distribute-quantities` resource.

New request body: Distribute Picked Quantities Input

New response body: Distribute Picked Quantities Output

### Get products without pricing information

Make a GET request to the existing `/commerce/webstores/webstoreId/products` resource.

This resource no longer returns pricing information regardless of the `excludePrices` request parameter. To get pricing information for products in version 58.0 and later, use the

`/commerce/webstores/webstoreId/pricing/products/productId` resource.

### Look up details about an order summary for a guest shopper or a registered buyer (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/webstores/webstoreId/order-summaries/actions/lookup` resource.

New request body: Order Summery Lookup Input

New response body: Order Summery Lookup Output

## Data Cloud

### Get a page of calculated insights

Make a GET request to the existing `/ssot/calculated-insights` resource.

New request parameter: `pageToken`

This request parameter was new in version 57.0 but was previously undocumented.

### Get segment members

Make a GET request to the new `/ssot/segments/segmentApiName/members` resource.

New response body: Data Cloud Segment Member Output

## Energy and Utilities Cloud

### Create an application for a program

Make a POST request to the new `/connect/eu-program/applications` resource.

New request body: Program Application Input

New response body: Program Application Output

## Experience Model

### Get experience model property types

Make a GET request to the new `/connect/experience-model/property-types` resource.

New response body: Experience Model Property Type Collection



**Get an experience model property type**

Make a GET request to the new `/connect/experience-model/property-types/fullyQualifiedName` resource.

New response body: Experience Model Property Type Detail

## Files

**Set an expiration date and indicate whether a password is required for a file share link**

Make a PUT request to the existing `/connect/files/fileId/file-shares/link` resource.

New request body: File Share Link Input

**Set an expiration date and indicate whether a password is required for a file share link in a community**

Make a PUT request to the existing `/connect/communities/communityId/files/fileId/file-shares/link` resource.

New request body: File Share Link Input

## Named Credentials

**Create an external credential**

Make a POST request to the existing `/named-credentials/external-credentials` resource.

New request body: External Credential Input

**Update an external credential**

Make a PUT request to the existing `/named-credentials/external-credentials/developerName` resource.

New request body: External Credential Input

**Delete an external credential**

Make a DELETE request to the existing `/named-credentials/external-credentials/developerName` resource.

**Get a list of named credentials in the org**

Make a GET request to the new `/named-credentials/named-credential-setup` resource.

New response body: Named Credential List

**Create a named credential**

Make a POST request to the new `/named-credentials/named-credential-setup` resource.

New request body: Named Credential Input

**Get a named credential**

Make a GET request to the new `/named-credentials/named-credential-setup/developerName` resource.

**Update a named credential**

Make a PUT request to the new `/named-credentials/named-credential-setup/developerName` resource.

New request body: Named Credential Input

**Delete a named credential**

Make a DELETE request to the new `/named-credentials/named-credential-setup/developerName` resource.

**Refresh a credential**

Make a POST request to the existing `/named-credentials/credential` resource.

New request parameter: `action` set to `refresh`

**Get the inbound network connection topologies for a region**

Make a GET request to the existing `/network-connection/inbound/connection-types/connectionType/topologies` resource.

New request parameter: `regions`

**Get the outbound network connection topologies for a region**

Make a GET request to the existing `/network-connection/outbound/connection-types/connectionType/topologies` resource.

New request parameter: `regions`

## Salesforce CMS

**Search for managed content items in multiple languages**

Make a GET request to the existing `/connect/cms/items/search` resource.

New request parameter: `languages`

In version 57.0, this resource returns all languages by default. In version 58.0 and later, if `languages` isn't specified, this resource returns only the default language of the workspace. To get all languages with this resource in version 58.0 and later, use `languages=All`.

**Create a managed content variant**

Make a POST request to the new `/connect/cms/contents/variants` resource.

New request body: Managed Content Variant Input

**Get a collection of published contents for a channel with absolute URLs**

Make a GET request to the existing `/connect/cms/delivery/channels/channelId/contents` resource.

New request parameter: `showAbsoluteUrls`

**Get a collection of published contents for an Experience Cloud site with absolute URLs**

Make a GET request to the existing `/connect/sites/siteId/cms/delivery/contents` resource.

New request parameter: `showAbsoluteUrls`

## Salesforce Payments

**Get an Apple Pay domain with the payment gateway**

Make a GET request to the new `/payments/merchant-accounts/merchantAccountId/apple-pay-domains` resource.

**Register an Apple Pay domain with the payment gateway**

Make a POST request to the new `/payments/merchant-accounts/merchantAccountId/apple-pay-domains` resource.

New request body: Apple Pay Domain Input

New response body: Apple Pay Domain Output

**Unregister an Apple Pay domain with the payment gateway**

Make a DELETE request to the new `/payments/merchant-accounts/merchantAccountId/apple-pay-domains` resource.

**Initiate a payment with Salesforce Payments**

Make a POST request to the new `/payments/payment-intents` resource.

New request body: Payment Intents Input

New response body: Payment Intents Output

**Retrieve a list of all configured payment method sets**

Make a GET request to the new `/payments/payment-method-sets/paymentMethodSetId` resource.

New response body: Payment Method Sets Output

**Get information on all active saved payment methods for an account or contact**

Make a GET request to the new

`/payments/merchant-accounts/merchantAccountId/saved-payment-methods?effectiveAccountId=` resource.

New response body: Saved Payment Methods Output

**Changed Connect REST API Request Bodies**

These request bodies have changes.

**Commerce****Cart Input**

This request body has this new property.

- `orderOwnerId`—ID of the order owner.

**Data Cloud****Data Cloud Identity Resolution Match Criterion Input**

This request body has this new property.

- `caseSensitiveMatch`—Specifies whether the criterion match is case sensitive (`true`) or not (`false`). Available only when matching is based on the [party identifier](#).

**Data Cloud Segment Input**

This request body is subject to these additional SQL validations, which are checked when creating or updating a segment.

- If the primary key of the segmentOn entity has key qualifiers, you must project the key qualifiers, as well, in the primary select. First project the primary key and then the qualifier. Group bys must also include the key qualifiers.
- If the primary key of the segmentOn entity has key qualifiers, you can provide an additional condition in the join on condition.
- Compare columns of the same data type. To compare columns of different data types, cast one or both of the operands so that they have the same type.
- Aliases are supported only for DMOs in the from block of the query. Columns can't be aliased.
- To join two DMOs, there must be a relationship between the DMOs, and you must use one of their related join keys in the join on condition. The join on condition can contain only an equality comparison between the joining keys and an optional additional condition for comparing FQK fields.

**Named Credentials****Credential Value Input**

This request body has this new property.

- `revision`—Revision number of a short-lived credential.

**External Credential Header Input**

This request body is renamed Credential Header Input.

## Salesforce CMS

**Managed Content Input**

This request body has this new property.

- `externalId`—External ID of the managed content.

**Changed Connect REST API Response Bodies**

These response bodies have changes.

## Commerce

**Application Context**

This response body has these new properties.

- `guestCartEnabled`—Indicates if guest cart access is enabled (`true`) or not (`false`). Replaces `guestCartCheckoutEnabled`.
- `guestCheckoutEnabled`—Indicates if guest checkout access is enabled (`true`) or not (`false`). Replaces `guestCartCheckoutEnabled`.
- `markets`—Market configuration for the store.


**Cart Summary**

This response body has this new property.

- `orderOwnerId`—ID of the order owner.

**Global Product Import**

This response body has these new pilot properties.

 **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.

- `slugsCreated`—Number of URL slugs created by the import.
- `slugsUpdated`—Number of URL slugs updated by the import.

**Product Detail**

This response body no longer returns this property.

- `entitlement`

This change is available in version 57, but was previously undocumented.

**Product Overview**

This response body no longer returns this property.

- `prices`

## Data Cloud

**Data Cloud Calculated Insight Action Run Response**

This response body is now called Data Cloud Calculated Insight Standard Action Response. This name change is available in version 57.0 but was previously undocumented.

**Data Cloud Calculated Insight Collection Data**

This response body has these new properties:

- `currentPageToken`—Token identifying the current page.
- `currentPageUrl`—Connect REST API URL identifying the current page.
- `nextPageToken`—Token identifying the next page, or `null` if there isn't a next page.
- `nextPageUrl`—Connect REST API URL identifying the next page, or `null` if there isn't a next page.
- `previousPageToken`—Token identifying the previous page, or `null` if there isn't a previous page.
- `previousPageUrl`—Connect REST API URL identifying the previous page, or `null` if there isn't a previous page.

These properties are available in version 57.0 but were previously undocumented.

**Data Cloud Identity Resolution Match Criterion Output**

This response body has this new property.

- `caseSensitiveMatch`—Specifies whether the criterion match is case sensitive (`true`) or not (`false`). Available only when matching is based on the [party identifier](#).

**Data Cloud Segment Output**

This response body has this new property.

- `segmentMembershipDmo`—Segment membership tables.

## Experience Cloud Sites

**Community Create**

This response body has this new property.

- `jobId`—ID of the [BackgroundOperation](#) record for the create job. Query this ID to track the creation status of the site.

**Community Publish**

This response body has this new property.

- `jobId`—ID of the [BackgroundOperation](#) record for the publish job. Query this ID to track the publish status of the site.

## Files

**File Share Link**

This response body has these new properties.

- `expirationDate`—Expiration date of the generated public link.
- `isPasswordRequired`—Specifies whether a password is needed for the file's public link (`true`) or not (`false`).
- `password`—If `isPasswordRequired` is `true`, the auto-generated password for the file's public link.

## Named Credentials

**Credential Custom Header**

This response body has this new property.

- `id`—ID of the customer header parameter.

**Credential Value**

This response body has this new property.

- `revision`—Revision number of a short-lived credential.

**External Credential**

This response body has these new properties.

- `id`—External credential ID.
- `url`—Connect REST API URL for the external credential.

**External Credential Parameter**

This response body has these new properties.

- `parameterDescription`—Parameter description.
- `parameterId`—Parameter ID.

**External Credential Principal**

This response body has these new properties.

- `id`—ID of the external credential principal.
- `parameters`—List of external credential parameters.
- `principalAccess`—List of access entities associated with the external credential principal.
- `sequenceNumber`—Sequence number of the external credential principal.

**Named Credential**

This response body has these new properties.

- `calloutOptions`—Callout options for the named credential.
- `calloutUrl`—URL of the named credential in a callout.
- `customHeaders`—Custom HTTP headers for the named credential.
- `externalCredentials`—External credentials used by the named credential.
- `id`—Named credential ID.
- `networkConnection`—PrivateConnect outbound network connection for the named credential.
- `parameters`—Named credential parameters.
- `type`—Type of named credential parameter.
- `url`—Connect REST API URL of the named credential.

## Salesforce CMS

**Managed Content Document**

This response body has these new properties.

- `externalId`—External ID of the managed content.
- `status`—Status of the managed content variant.

**Managed Content Space**

This response body has this new property.

- `isFlowOrchestrationEnabled`—Specifies whether Flow Orchestration is enabled (`true`) or not (`false`).

**Managed Content Variant**

This response body has this new property.

- `externalId`—External ID of the managed content.

**Managed Content Variant Search Result**

This response body has this new property.

- `managedContentId`—ID of the managed content parent of the managed content variant.

## CRM Analytics REST API

Using the CRM Analytics REST API, run validation on your templates, add compact joins to queries, and use interactions with image, number, and container 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](#)

These request bodies have changes.

[Changed CRM Analytics REST API Response Bodies](#)

These response bodies have changes.

## New and Changed CRM Analytics REST API Resources

These resources are new or have changes.

### Get the lint score for a template

Make a GET request to the new `/wave/template/templateIDOrApiName/lint` resource.

New response body: Template Lint

### Create a lint score for a template

Make a PUT request to the new `/wave/template/templateIDOrApiName/lint` resource.

New response body: Template Link

### Delete a lint score for a template

Make a DELETE request to the new `/wave/template/templateIDOrApiName/lint` resource.

### Validate a template

Make a POST request to the `/wave//template/templateIDOrApiName/validate` resource.

New request body: Template Validate Input

New response body: Template Validate

### Use the new Compact Form Join in queries

Make a POST request to the `/wave/query` resource.

Response body includes new Compact Form Join and Compact Form Join Object representations.

### Use the new variable types in templates

Make a GET request to the `/wave/template/templateIDOrApiName/configuration` resource.

Response body includes new Calculated Insight Type, Data Lake Object Type, and Data Model Object Type representations.

## Changed CRM Analytics REST API Request Bodies

These request bodies have changes.

### Compact Form Source Input

The request body has this new property.

- `joins`—A list of compact form source joins.

**Container Widget Parameters Input**

The request body has this new property.

- `interactions`—The interactions for the widget.

**Dashboard State Input**

The request body has this new property.

- `parameters`—A list of parameters created for the dashboard or component.

**Image Widget Parameters Input**

The request body has this new property.

- `interactions`—The interactions for the widget.

**Number Widget Parameters Input**

The request body has this new property.

- `interactions`—The interactions for the widget.

**Changed CRM Analytics REST API Response Bodies**

These response bodies have changes.

**Auto Install App Configuration**

The response body has this new property.

- `licenseAttributes`—The license type to use to create the app with auto-install.

**Compact Form Source**

The response body has this new property.

- `joins`—A list of compact form source joins.

**Container Widget Parameters**

The response body has this new property.

- `interactions`—The interactions for the widget.

**Dashboard State**

The response body has this new property.

- `parameters`—A list of parameters created for the dashboard or component.

**Image Widget Parameters**

The response body has this new property.

- `interactions`—The interactions for the widget.

**Lens Source Asset**

The response body has these new properties.

- `dashboardId`—The 18-character ID of the dashboard.
- `savedView`—The saved view of the dashboard.

**Number Type**

The response body has this new property.

- `enumLabels`—A list of display labels for the enumerated values.



### Number Widget Parameters

The response body has this new property.

- `interactions`—The interactions for the widget.

### String Type

The response body has this new property.

- `enumLabels`—A list of display labels for the enumerated values.

### Wave Features

The response body has these new properties.

- `canUseExploreRecommendation`—Indicates whether the org has explore Unified Analytics recommendations enabled (`true`) or not (`false`).
- `canUseWatchRecommendation` — Indicates whether the org use has Analytics watch recommendations enabled (`true`) or not (`false`).
- `orgCanViewTableauWorkbook` — Indicates whether the org has view Tableau workbooks enabled (`true`) or not (`false`).
- `orgHasDataCloudReportingEnabled` — Indicates whether the org has Data Cloud reports enabled (`true`) or not (`false`).
- `orgHasWatchEnabled` — Indicates whether the org has Unified Analytics watch enabled (`true`) or not (`false`).
- `userCanAccessGeniePlatform` — Indicates whether the user access to the Data Cloud platform is enabled (`true`) or not (`false`).
- `userHasCdcReportingCreateReports` — Indicates whether the user has create Data Cloud reports enabled (`true`) or not (`false`).
- `userHasCdcReportingManageFolders` — Indicates whether the user has manage Data Cloud report folders enabled (`true`) or not (`false`).
- `userHasCdcReportingViewReports` — Indicates whether the user has view Data Cloud reports enabled (`true`) or not (`false`).
- `userHasDataCloudReportingEnabled` — Indicates whether the user has Data Cloud reporting enabled (`true`) or not (`false`).
- `userHasWatchEnabled` — Indicates whether the user has Unified Analytics watch enabled (`true`) or not (`false`).

### Metadata API

Access more metadata using these new and changed Metadata API types.

### Salesforce Overall

#### **REMOVED: The ServiceFieldType metadata type is removed**

Deprecated in API version 34.0, the ServiceFieldType metadata type is removed in API version 58.0 and later.

### Accounting Subledger

#### **Create accounting field mappings to organize your data and bring it to ledger entry records**

Use the new AccountingFieldMapping metadata type.

## Analytics

### Enable new Analytics features for using Analytics in Public Cloud, Amazon Redshift Output Connector, and indexing custom fiscal dates in SQL

Enable these features using new fields on the `AnalyticsSettings` metadata type.

- To enable using CRM Analytics in the public cloud, use the `enableInsightsHCMODE` field.
- To enable Amazon Redshift Output connectors, use the `enableAmazonRedshiftOutputConnector` field.
- To enable indexing of custom fiscal date fields in SQL queries, use the `enableWaveSqlCFIndexing` field.
- To enable high-volume push back for Einstein Discovery models, use the `isHighVolumePushbackEnabled` field.

## Commerce

### Enable Salesforce Payments

Use the new `PaymentSettings` metadata type to enable Salesforce Payments in your org.

## Customization

### Allow delegated admins to manage permission set group assignments


Use the new `permissionSetGroups` field on the existing `DelegateGroup` metadata type.

### Determine whether Salesforce Edge Network is enabled during the scheduled rollout

Use the new `enableEdgeDuringRollout` field on the existing `MyDomainSettings` metadata type.


### Enable user access policies (beta)

Use the new `userAccessPoliciesEnabled` field on the existing `UserManagementSettings` 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](#).


### Reference multiple resources in the same user criteria filter of your user access policy (beta)

Use the new supported value `in` in the existing `operation` field on the `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](#).


### See the quick actions that are used on related lists in the page layout (beta)

Use the new `quickActions` field on the existing `RelatedListItem` subtype of the `Layout` 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](#).

### Enable or disable Dynamic Forms on Mobile (Beta)

Use the `enableFormsOnMobile` field on the new `DynamicFormsSettings` 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

### DEPRECATED: The `dateFormat` field is deprecated in API version 55.0

The `dateFormat` field on the `MktDataLakeAttributes` metadata type has been deprecated.

### Identify the developer name of the key qualifier field

Use the new `mktDataLakeSrcKeyQualifier` and `keyQualifierName` fields on the existing `MktDataLakeAttributes` metadata type.

**Provide a description of the data model object**

Use the new `description` field on the existing `MktDataModelAttributes` metadata type. Introduced in API version 55.0, this field has been added to the *Metadata API Developer Guide*.

**Include additional attributes on objects that aren't present in the Data Model Object POJO**

Use the new `isUsedForMetrics` field on the existing `MktDataModelAttributes` metadata type. Introduced in API version 55.0, this field has been added to the *Metadata API Developer Guide*.

**Development****Provide a user-friendly label for your event relay**

Use the new `label` field on the `EventRelayConfig` metadata type to specify a label. The label is displayed in the UI. Use a meaningful label that describes your event relay and try to make it unique.

**Enable enhanced usage metrics with PlatformEventUsageMetric queries for platform events and change data capture events**

Use the new `PlatformEventSettings` metadata type.

**Set the DataWeaveScriptResource generated class to be global.**

Use the new `DataWeaveResource` metadata type.

**Experience Cloud****Create a custom property type for easier code reuse in custom Lightning web components in LWR sites (beta)**

Use the new `ExperiencePropertyTypeBundle` metadata type. This type is available as part of the [Custom Property Types and Custom Property Editors 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](#).

**Use SEO-friendly URLs in B2C Commerce LWR sites (beta)**

Use the new `enableExperienceFriendlyUrls` field on the `SiteSettings` 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](#).

**Sales****Increase event limits and turn on enhanced features for Calendar**

Use the new `enableCalendarHomeLWC` field on the existing `ActivitiesSettings` metadata type.

**Forecast on deals that are split on an opportunity line item level**

Use the new `opptyLineItemSplitType` field on the existing `ForecastingType` metadata type.

**Identify whether optimal speaker separation and Activity 360 Reporting are enabled**

Use the new `enableDiarizationPref` and `enableUnifiedActivities` fields on the existing `ConversationalIntelligenceSettings` metadata type.

**Salesforce Flow****Reference setup objects in a flow**

Use the new `setupReference` and `setupReferenceType` fields on the existing `FlowElementReferenceOrValue` subtype of the `Flow` metadata type.

**View a process's migrated criteria and the resulting migrated flow.**

Use the new `ProcessFlowMigration` metadata type.

**Security and Identity****Group parameters with their principals**

Use the new `parameterGroup` field on the `ExternalCredentialParameter` subtype of the `ExternalCredential` metadata type to ensure that parameters are applied only when authenticated against a principal that they're grouped with.

**REMOVED: The `principal` field is removed**

The `principal` field on the `ExternalCredentialParameter` subtype of the `ExternalCredential` metadata type is removed in API version 58.0 and later.

**Service****Associate individuals with customer interactions to give support agents context**

Use the new `IndividualObjectLinkingFlow` value in the existing `FlowProcessType` subtype of the `Flow` metadata type.

**Associate a Voice channel type with an Embedded Service Messaging channel**

Use the new supported value `Voice` in the existing `messagingChannelType` field on the `MessagingChannel` metadata type.

**REST API**

These calls are changed in API version 58.0

**Changed Calls****BEHAVIOR CHANGE: REST URIs No Longer Accept File Extensions**

JSON and XML can no longer be appended directly to REST URIs to specify content type. Although API versions 57.0 and earlier still support this functionality, transition away from this syntax before these versions aren't available. Instead, to specify the content type to return for REST requests, use the `HTTP_ACCEPT` header.

**Async SOQL Is Being Retired**

Async SOQL is retired in Summer '23. Use Bulk API or batch Apex to query big objects.

**Where:** This change affects all versions of Async SOQL.

For information on migrating, refer to the [feature retirement support article](#).

**Subscription Management API**

Use Subscription Management API to build your self-service B2B solutions.

**Create orders and quotes containing bundled products**

Use the Composite API to create quotes and orders for new sales.

**Calculate the price of bundled products**

Use the updated `pricing/salestransaction/actions/calculate-price` request. A bundled product can be price inclusive or price exclusive and is included in volume and term-based discount calculations.

**Automatically calculate term-based discounts**

Previously, the `pricing/salestransaction/actions/calculate-price` request incorporated volume-based discounts into price calculations. Now, this request also incorporates term-based discounts.

**Tooling API New and Changed Objects**

Access more metadata through these new and changed Tooling API objects.

**Salesforce Overall****REMOVED: The ServiceFieldType object is removed**

Deprecated in API version 34.0, the `ServiceFieldType` object is removed in API version 58.0 and later.

**Customization****Reference multiple resources in the same user criteria filter of your user access policy (beta)**

Use the new supported value `in` in the existing `Operation` field on the `UserAccessPolicyFilter` object.



**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](#).

**Sales****Forecast on deals that are split on an opportunity line item level**

Use the new `OpptyLineItemSplitTypeId` field on the existing `ForecastingType` object.

**REMOVED: The MovedIn and MovedOut picklist values are removed**

The `MovedIn` and `MovedOut` picklist values are removed from the `Metric` field on the `PipelineInspMetricConfig` object.

**Salesforce Flow****View a process's migrated criteria and the resulting migrated flow**

Use the new `ProcessFlowMigration` object.

**Salesforce Payments****Manage the connection between Salesforce Payments and the payment gateway provider**

Use the `PaymentGatewayProvider` object. Introduced in API version 48.0, this field has been added to the *Tooling API Reference and Developer Guide*.

**Security and Identity****Group parameters with their principals**

Use the new `ParameterGroup` field on the `ExternalCredentialParameter` object to ensure that parameters are applied only when authenticated against a principal that they're grouped with.

**REMOVED: The Principal field is removed**

The `Principal` field on the `ExternalCredentialParameter` object is removed in API version 58.0 and later.

## Service

### Manage shift segments for Shift Scheduling and Workforce Engagement

Use the new `ShiftSegmentType` object. Introduced in API version 55.0, this field has been added to the *Tooling API Reference and Developer Guide*.

## User Interface API

Prevent duplication of records with idempotent record writes on more UI API resources, and work with more objects.

### IN THIS SECTION:

#### [Prevent Record Duplication with Idempotent Record Writes \(Beta\)](#)

Use idempotent record writes to avoid duplication of records and server-side operations. Duplication of records and server-side operations can occur when an app or client encounters a network connection issue. By making a request idempotent, your records on the server remain in the same state even if an identical request is made once or multiple times.

#### [Supported Objects](#)

All new standard objects are auto-enabled for use with User Interface API.

#### [New and Changed User Interface API Resources](#)

These resources are new or have changes.

#### [New and Changed User Interface API Response Bodies](#)

These response bodies are new or have changes.

### Prevent Record Duplication with Idempotent Record Writes (Beta)

Use idempotent record writes to avoid duplication of records and server-side operations. Duplication of records and server-side operations can occur when an app or client encounters a network connection issue. By making a request idempotent, your records on the server remain in the same state even if an identical request is made once or multiple times.

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



**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 make your UI API request idempotent on a supported resource, include an `Idempotency-Key` using a UUID v4 format in the request header.

### SEE ALSO:

[User Interface API Developer Guide: Prevent Record Duplication with Idempotent Record Writes \(Beta\)](#)

### Supported Objects

All new standard objects are auto-enabled for use with User Interface API.

Previously, we provided a list of objects that are supported by User Interface API in the current release. As of Summer '23, all new standard objects are automatically enabled for User Interface API unless otherwise specified.



**Note:** To view new objects that are auto-enabled for User Interface API, see [New and Changed Objects](#).

These standard objects are not new to your org but are new for User Interface API.

- `AutomatedAction`

- AutomatedActionCondition
- AutomatedActionParameter
- ContractGroupPlanGroupClass
- ECart
- OpportunityLineItemSplit
- OpportunitySplit
- PriceAdjustmentGroupShape
- PriceAdjustmentItemShape
- PriceRule
- PriceRuleAction
- PriceRuleActionItem
- PriceRuleCondition
- PriceRuleConditionFilter
- PriceRuleExecutionStage
- PrivacyJobSession
- PrivacyPolicy
- ProductSpecificationType
- PromotionDataTranslation
- SalesTransactionItemShape
- SalesTransactionShape
- SalesTrxnItemRelationShape
- SvcCatalogCategory
- SvcCatalogCategoryItem
- SvcCatalogItemDef
- Translation

Review these documentation updates for User Interface API.

#### All Supported Objects documentation

The [All Supported Objects](#) documentation might not reflect the latest state of object support. We recommend using [/ui-api/object-info](#) resource to get a directory of objects that User Interface API supports. To check if a specific object is supported, use [/ui-api/object-info/objectApiName](#) instead. For example, User Interface API doesn't support Report, and the resource returns an `UNSUPPORTED_API_VERSION` error code.

#### List View Supported Objects documentation

The [List View Supported Objects](#) documentation might not reflect the latest state of object support. We recommend using the [/ui-api/list-ui/objectApiName](#) resource to check if User Interface API supports list views for a specific object. For example, User Interface API doesn't support Report, and the resource returns an `UNSUPPORTED_API_VERSION` error code.

#### Most Recently Used List View Supported Objects documentation

The [Most Recently Used List View Supported Objects](#) documentation might not reflect the latest state of object support. We recommend using the [/ui-api/mru-list-info/objectApiName](#) resource to check if User Interface API supports most

recently used list views for a specific object. For example, User Interface API doesn't support Report, and the resource returns an `INVALID_TYPE` error code.

SEE ALSO:

[User Interface API Developer Guide: Send a Request Using Postman](#)

[User Interface API Developer Guide: Supported Objects](#)

## New and Changed User Interface API Resources

These resources are new or have changes.

### Salesforce Overall

#### Use a quick action to update a record

Make a PATCH request to `/ui-api/actions/perform-quick-action/${actionApiName}`.

#### Get the record layout used by a quick action

Make a GET request to `/ui-api/actions/layout/${actionApiName}`.



**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](#).

## New and Changed User Interface API Response Bodies

These response bodies are new or have changes.

### Salesforce Overall

#### List Column

This response body has a new property.

- `lookupId`—Get more information about lookup fields in a list view.

#### Related List Info

This response body has a new property.

- `filterable`—Indicates whether users can apply quick filters to related lists.

#### Quick Action Layout

This new response body returns the record layout used by a quick action.



**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](#).

### Field Service

#### Picklist Value

This response body has a changed property.

- `attributes`—The Work Step Status Picklist Value Attributes type is now supported.



## GraphQL API

Analyze query results by using aggregate functions with or without grouping. Get more information about an error from the `ErrorType` field.


### Query records with aggregate functions

Count query results that match a certain criteria and find the average, maximum, minimum, or sum of numeric fields. For example, you can query the average revenue on all accounts or total amount of all opportunities.

The `uiapi` field now includes the `aggregate` field of `RecordQueryAggregate` type. Each object type now maps to the `<object>AggregateConnection` type, which contains these fields.

- `edges`—The `<object>AggregateEdge` type that contains `cursor` and `node` fields, in which you can pass a `record` or `aggregate` field.
- `pageInfo`—Contains relative position information, which shows where in the entire result set the current page is located.
- `totalCount`—The total number of results that match the criteria.

For example, the `Account` object maps to the `AccountAggregateConnection` type.

 **Note:** To examine the GraphQL API schema for your org, use the [Altair GraphQL client](#).

GraphQL API supports these aggregate functions.

- `avg`—Returns the average value of a numeric field.
- `count`—Returns the number of results matching the query criteria.
- `countDistinct`—Returns the number of distinct non-null field values matching the query criteria.
- `grouping`—Specifies if a field is used when composing the group. Use with the `groupBy` argument and the `ROLLUP` or `CUBE` type. Returns 0 if the aggregation is applied to the group or 1 if the field is removed from consideration of the group. When all groupings return 1, the aggregation is applied to all results.
- `max`—Returns the maximum value of a field.
- `min`—Returns the minimum value of a field.
- `sum`—Returns the total sum of a numeric field.

### Use aggregate functions with grouping

Summarize your data using aggregate functions with a group of records. For example, you can find the average amount of all opportunities by campaign.

Using the `aggregate` field, you can group results with the `groupBy` argument in several ways.

- `group` field—Groups the query by the specific field. Pass in `group: true` to the `groupBy` argument for the field that you want to group by.

```
ObjectApiName (groupBy: { Field1: { group: true } })
```

- `ROLLUP` type—Adds subtotals for aggregated data in the query result. Accepts up to three fields in a comma-separated list.

```
ObjectApiName (groupBy: { type: ROLLUP, Field1: { group: true }, Field2: { group: true } })
```

- `CUBE` type—Adds subtotals for all combinations of a grouped field in the query results. Accepts up to three fields in a comma-separated list.

```
ObjectApiName (groupBy: { type: CUBE, Field1: { group: true }, Field2: { group: true } })
```

**Get error information from a request**

The `GraphQLErrorRepresentation` type has a new field.

- `extensions`—Information about the error provided in the `ErrorType` field. `ErrorType` returns one of these error types.
  - `InvalidSyntax`—The request contains a syntax error.
  - `ValidationError`—The request is not valid against the GraphQL API schema. For example, this can occur if an object or field name included in the query doesn't exist.
  - `DataFetchingException`—An exception occurred while fetching data, for example, invalid credentials.
  - `OperationNotSupported`—Although the request is valid against the GraphQL API schema and successfully parsed, the server can't resolve which operation to run.
  - `ExecutionAborted`—The request didn't complete successfully.

**Use more comparison operators on the `PicklistOperators` filter type**

These comparison operators have been added for the `PicklistOperators` filter type:

- `gt`—Greater than. The expression is true if the field value is greater than the specified value.
- `gte`—Greater than or equal. The expression is true if the field value is greater than or equal to the specified value.
- `like`—The expression is true if the field value matches the characters of the specified value. Supported for string fields only.
- `lt`—Less than. The expression is true if the field value is less than the specified value.
- `lte`—Less than or equal. The expression is true if the field value is less than or equal to the specified value.

SEE ALSO:

[GraphQL API Developer Guide](#)

## Einstein

---

Use Decision Optimization (beta) to refine your Einstein recommendations based on your business rules, objectives, and constraints. Spin up propensity models for common use cases across Industries clouds with Scoring Framework, now generally available. Easily add prebuilt functionality to multiple bots with Bot Blocks (beta). Include emails and related transcripts to build better Einstein Conversation Mining reports.

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

## Salesforce Overall

### Einstein Search

Improve how you receive your search results. With Search Manager, configure searchable standard and custom objects, even picklists, to see information related to your work. You can also receive specific answers from a knowledge article with Einstein Search Answers.

## Analytics

### Einstein Discovery

Turn on Decision Optimization (beta) to improve Einstein's recommendations. Migrate your Einstein Discovery models, including the configuration of the model, with packages.

## Commerce

### Commerce Einstein

Let GPT Einstein generate product descriptions using Einstein GPT.

## Industries

### Einstein Relationship Insights

Expand the scope of your relationship recommendations by exploring case notes captured by interaction summaries.

### AI Accelerator

Get AI Accelerator with multiple Industries clouds.

### Scoring Framework (Generally Available)

Use Scoring Framework, a CRM Analytics-based framework, to easily and quickly build and deploy propensity models for multiple Industries clouds use cases using clicks instead of code. Define template configurations for your scoring use cases to create CRM Analytics apps, Einstein Discovery models, and recipes.

## Sales

### Einstein Conversation Insights

Your teams can now use Einstein Conversation Insights with more voice recording providers, including Dialpad, RingCentral, Aircall, and Amazon Connect. Einstein Conversation Insights also supports over a dozen languages and several different dialects, and enhanced reporting features are available for everyone. Einstein Conversation Insights users are also prompted to turn on the speaker separation feature to help with the creation of transcripts and call insights.

### Sales Cloud Einstein

Let Einstein GPT draft sales emails from a sales rep's inbox or anywhere in Salesforce. Monitor changes to Einstein Forecasting predictions with a new chart that shows a prediction trend line across periods. Get ready to bid farewell to Account Insights and Opportunity Insights, which are being retired.

## Service

### Einstein Bots

Use Bot Blocks (beta) to add a dialog group to multiple bots, including prebuilt blocks from the Einstein Bot Library. Now it's easier to create an enhanced bot from scratch or a template. Plus, add structured content to an enhanced bot with expanded support for messaging components. The Bot Builder gets a new list view for dialog steps, support for direct invocation of standard actions, and more.

### Einstein Classification

Save agents time with AI-generated case summaries.

### Einstein Conversation Mining (beta)

Transform conversation data into service insights and build bot intents with Einstein Conversation Mining (beta). Use email conversations or related transcripts to build reports.

### Einstein Reply Recommendations

Optimize agent productivity and response quality with AI-generated replies. Update replies with on demand template creation, get reply recommendations in enhanced messaging channels, and the model that recommends replies to agents during chats is automatically retrained each month.

## 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](#)

Scale your company's enablement solution across the enterprise with new resources for building, assigning, and managing programs. Give Enablement admins shortcuts for building the right type of program and measuring the right type of activity. Expand the integration of Enablement across your company's Salesforce implementation with new capabilities for assigning more users and analyzing program performance. Bring it all together with tools for managing Digital Experiences content more easily and setting up sandboxes for testing more efficiently.

#### [Guidance Center and In-App Guidance](#)

Enjoy more flexibility and precision when you create prompts that appear for users as they navigate Lightning Experience. Deliver a more personalized experience for Salesforce admins, Enablement admins and users, and Starter Edition users who access content in the Guidance Center.

## Enablement

Scale your company's enablement solution across the enterprise with new resources for building, assigning, and managing programs. Give Enablement admins shortcuts for building the right type of program and measuring the right type of activity. Expand the integration of Enablement across your company's Salesforce implementation with new capabilities for assigning more users and analyzing program performance. Bring it all together with tools for managing Digital Experiences content more easily and setting up sandboxes for testing more efficiently.

### IN THIS SECTION:

#### [Preview Enablement Programs and Templates](#)

Choose the right program for your company by viewing Enablement program and template content easily. Check out different programs and templates outside Program Builder with fewer clicks and less navigation. A program or template preview includes their summary along with the program item types, names, and descriptions.

#### [Build Programs Faster with More Predefined Measures](#)

Three new predefined measures are available to help you roll out Enablement programs faster. Easily set goals for sales reps around meeting an average deal size. You can also set goals for sales reps to meet a specific amount in their pipeline. Or, use your Einstein Conversation Insights (ECI) call data to measure the number of calls that users make where they mention follow-up, scheduling, or action items.

#### [Build In Flexibility and Prove Consistency Using Average-Based Goals](#)

Set flexible goals for Enablement users that demonstrate consistent contributions toward your company's bottom line. Rather than setting goals that require users to meet hard requirements every time, give users the flexibility to meet achievements on average across multiple attempts. To encourage consistent ability, determine the number of times users must attempt the achievement by setting a minimum sample size for the data you're averaging. Previously, you could measure users' achievements only in absolutes by counting records or summing totals.

### [Get More Control Over Enablement Admins' View of Objects and Fields](#)

Maintain your object- and field-level security while giving Enablement admins the freedom to build programs that drive your company's preferred business outcomes. If you use permission sets or profiles to hide users' access to objects and fields, you can separately manage Enablement admins' access to build measures on those hidden items.

### [Assign Users to Enablement Programs More Efficiently](#)

Get more tasks done while you wait for Enablement program assignments to complete, and start integrating Enablement with Salesforce development tools that your company already uses. When assigning a program to 11 or more users at a time, Enablement admins now receive email confirmation instead of having to wait in the assignment window. Or, automate program assignment with an invocable action, which Enablement admins can use to assign a program to users based on criteria that you specify.

### [Test Enablement in All Sandbox Types More Easily](#)

Add more robust quality assurance to your Enablement rollout by ensuring that your sandbox has all the resources necessary for testing end-to-end behavior. In a Developer, Developer Pro, or Partial Copy sandbox, you can now easily provision the Enablement workspace in Digital Experiences, which is required for managing content linked from exercises in Enablement programs. Without this workspace, you can't properly test all Enablement program functionality before you deploy to production. Previously, only a Full sandbox included this workspace by default.

### [Manage Images for Rich Text Content in Lesson Exercises More Efficiently](#)

Create, publish, and revise images that appear in Lesson exercises in Enablement programs with fewer clicks and headaches. The Create CMS content window in the Enablement workspace in Digital Experiences includes a new Image content type. Previously, content creators could insert and publish images only when editing and publishing a Rich Text content type, which is used with Lesson exercises. Content creators can now manage images independently from the Rich Text content types where the images are used. For example, a content creator can add and publish an image first and then reference the published image in rich text.

### [Other Changes in Enablement](#)

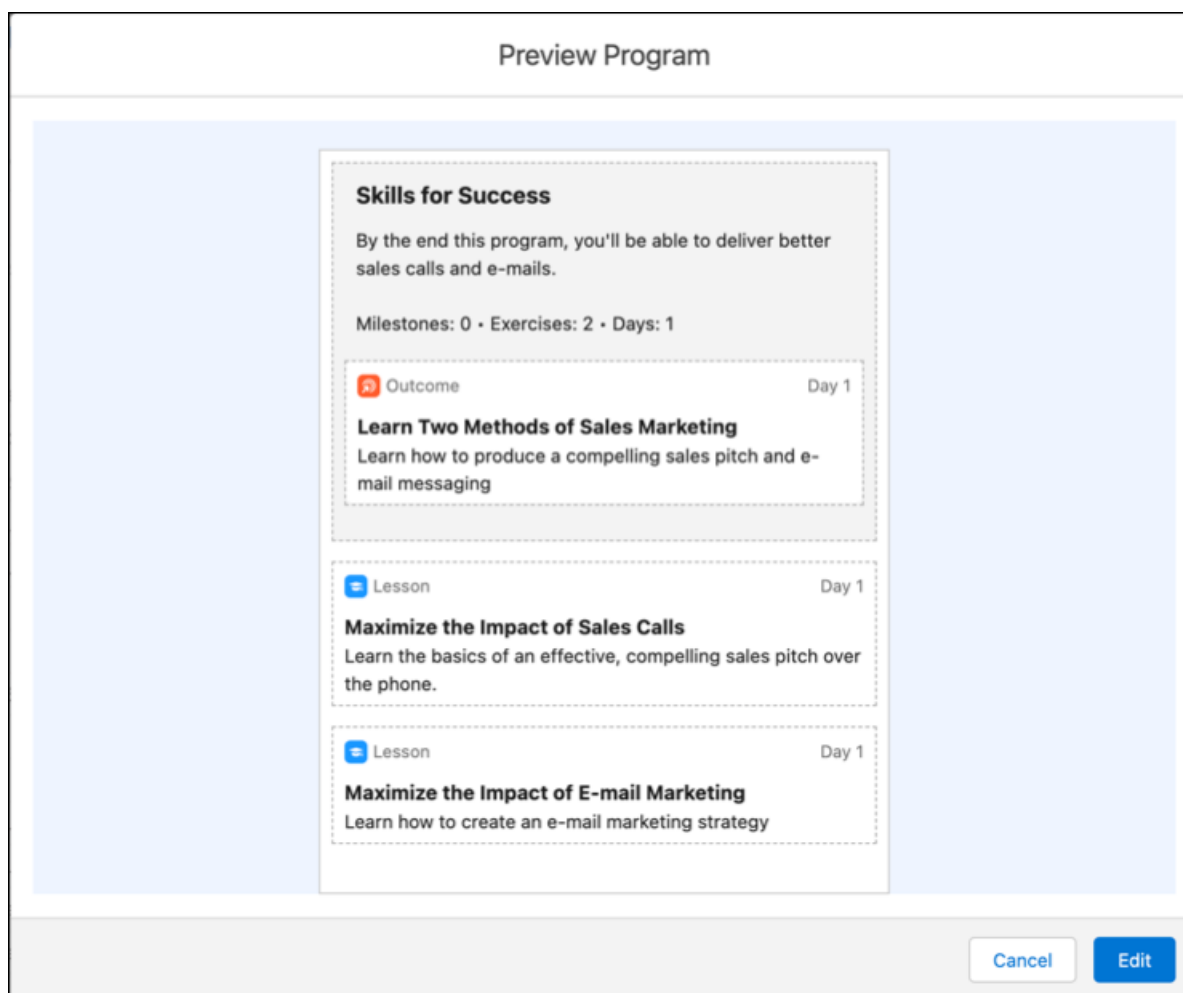
Salesforce admins, Enablement teams, and content creators benefit from other enhancements throughout the Enablement workflow.

## Preview Enablement Programs and Templates

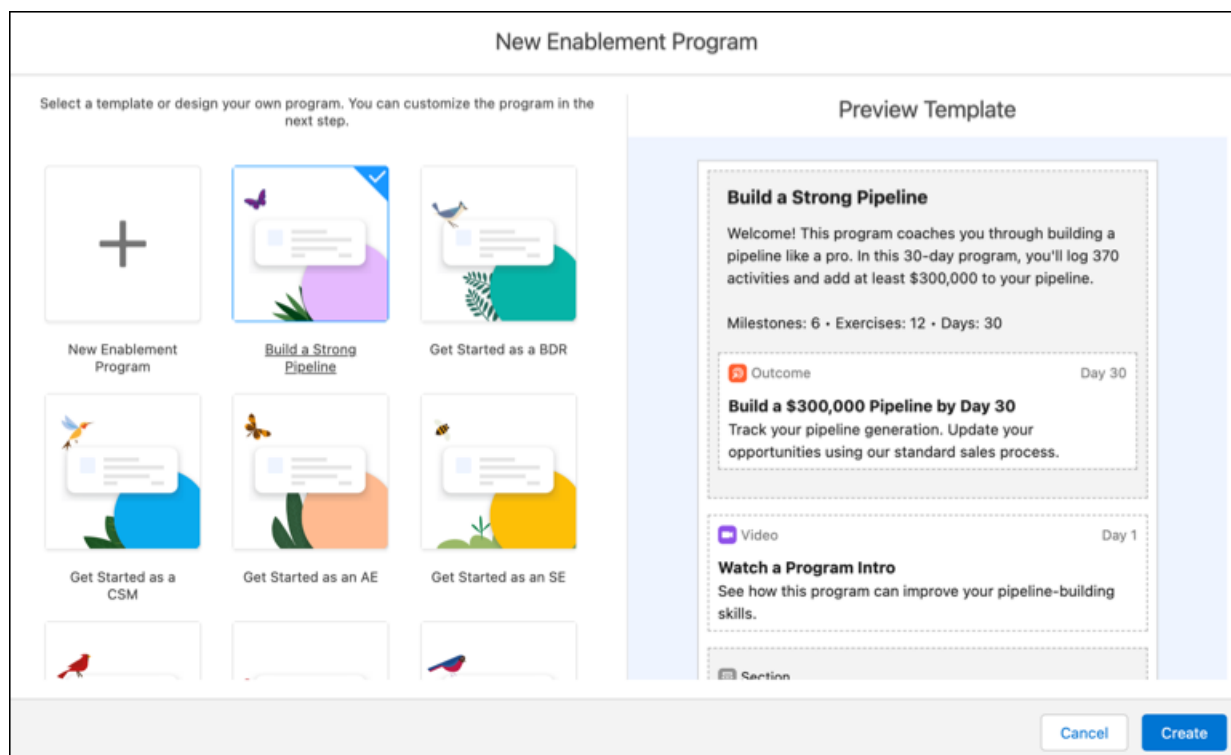
Choose the right program for your company by viewing Enablement program and template content easily. Check out different programs and templates outside Program Builder with fewer clicks and less navigation. A program or template preview includes their summary along with the program item types, names, and descriptions.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions with Sales Cloud, Service Cloud, Financial Services Cloud, Health Cloud, and Salesforce Platform. An Enablement add-on license is required.

**How:** To preview a program, select the program on the Enablement Programs page and then select **Preview** from the row-level actions. Edit the program using Program Builder or preview other programs.



When creating a program, select a template in the New Enablement Program window to preview the template's content. Create a program using the template or preview other templates.



## SEE ALSO:

- [Salesforce Help: Create Enablement Programs Based on Templates](#)
- [Salesforce Help: Prerequisites for Enablement Program Templates](#)
- [Salesforce Help: Clone Enablement Programs](#)

## Build Programs Faster with More Predefined Measures

Three new predefined measures are available to help you roll out Enablement programs faster. Easily set goals for sales reps around meeting an average deal size. You can also set goals for sales reps to meet a specific amount in their pipeline. Or, use your Einstein Conversation Insights (ECI) call data to measure the number of calls that users make where they mention follow-up, scheduling, or action items.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions with Sales Cloud, Service Cloud, Financial Services Cloud, Health Cloud, and Salesforce Platform. An Enablement add-on license is required.

**How:** Check the Enablement page in Setup for the status of these prebuilt measures.

- Average Deal Size
- Total Amount in Pipeline

If you've set up ECI and integrated it with Enablement, the Number of Calls with Next Steps measure is also available. If it isn't, complete the prerequisite setup and then click **Create Enablement Measures**.

Enablement admins have access to all prebuilt measures with the Available status and can add those measures to program outcomes and milestones from the Program Builder.

SEE ALSO:

[Salesforce Help: Check Out Prebuilt Enablement Measures](#)

[Salesforce Help: Set Up Einstein Conversation Insights for Enablement](#)

## Build In Flexibility and Prove Consistency Using Average-Based Goals

Set flexible goals for Enablement users that demonstrate consistent contributions toward your company's bottom line. Rather than setting goals that require users to meet hard requirements every time, give users the flexibility to meet achievements on average across multiple attempts. To encourage consistent ability, determine the number of times users must attempt the achievement by setting a minimum sample size for the data you're averaging. Previously, you could measure users' achievements only in absolutes by counting records or summing totals.

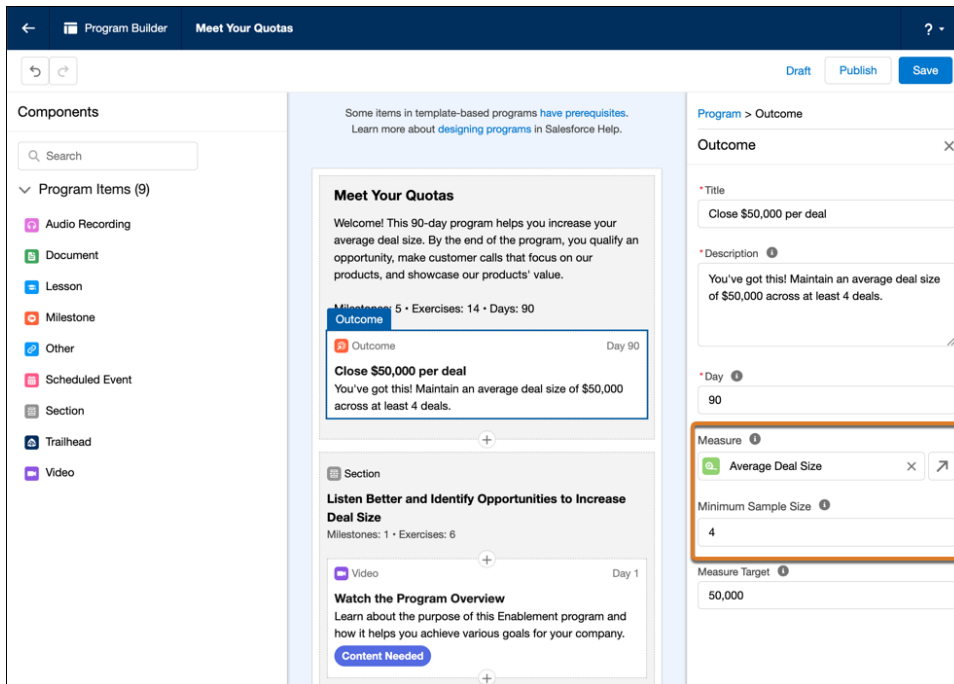
**Where:** This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions with Sales Cloud, Service Cloud, Financial Services Cloud, Health Cloud, and Salesforce Platform. An Enablement add-on license is required.

**How:** To set average-based goals, Enablement admins can build a measure using the new Average Calculation Method. Any field that captures numerical or currency data can be averaged.

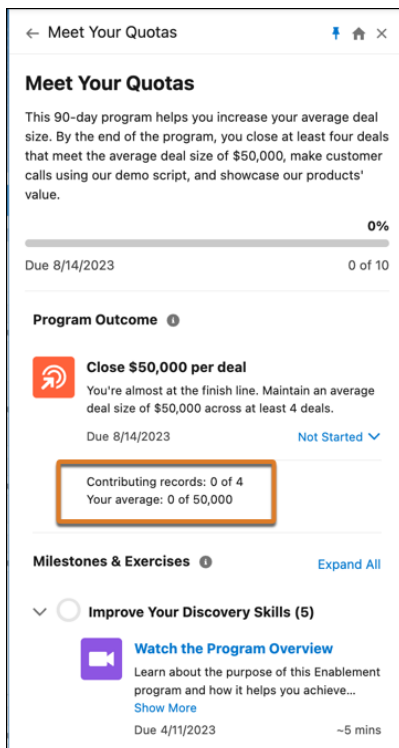
The screenshot shows the 'New Enablement Measure' configuration interface. On the left, a 'Guided Setup' sidebar lists 'Name & Description', 'Object', 'Who, When, and How' (selected), 'Field Filters', and 'Preview'. The main area is titled 'Who, When, and How' and contains a question: 'Who, when, and how are you measuring?'. Below this, it says 'Identify how your measure is related to the goals you set in your programs.' There are three fields: 'Display Field' with a dropdown showing 'Name', 'User Field' with a dropdown showing 'Owner ID', and 'Date Field' with a dropdown showing 'Close Date'. Below these is a 'Calculation Method' dropdown, which is highlighted with an orange box. The dropdown shows 'Count' as the selected option, and 'Average' is visible below it. To the right of the dropdown is a 'Help with Measures' panel titled 'Define how this measure is computed'. It explains that there are several options for calculating progress: 'Count individual records to calculate "how many".', 'Sum field data across multiple records to calculate "how much".', and 'Average field data across multiple records to calculate "on average, how much".' Below this, it says 'If you choose Sum or Average, next you're prompted to define which field data you want to measure.' and shows an 'Example of Count'.

Then, from Program Builder, Enablement admins can add the measure to program outcomes or milestones. Enablement admins establish the minimum sample size to set the number of records that users must create or update to meet the goal.





When a user takes a program with an average-based goal, their progress toward meeting the average is shown in the Guidance Center.



Enablement admins get visibility into how users are progressing toward average-based goals by comparing the new Minimum Sample Size and the Average Contributing Record Count columns in program reports.

Report: Program Task Progress Spring '23  
**Outcome Progress**  
 Analyze the overall progress of an outcome with key data and information such as milestone target, target day, completion rates, and more.

Program	Program Task	Created By	Average Milestone Target	Average Target Day	Average Contributing Record Count	Minimum Sample Size
Build Your Pipeline	00. outcome ss	John	20	1	0	3.00
Close your first deal in 45 days	18. Close a Deal by Day 45	John	1	45	0	0.00
Meet Your Quotas	00. Close \$50,000 per deal	Admin User	50,000	90	0	4.00

SEE ALSO:

[Salesforce Help: Guidelines for Assembling Enablement Programs](#)

## Get More Control Over Enablement Admins' View of Objects and Fields

Maintain your object- and field-level security while giving Enablement admins the freedom to build programs that drive your company's preferred business outcomes. If you use permission sets or profiles to hide users' access to objects and fields, you can separately manage Enablement admins' access to build measures on those hidden items.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions with Sales Cloud, Service Cloud, Financial Services Cloud, Health Cloud, and Salesforce Platform. An Enablement add-on license is required.

**How:** To manage Enablement admins' access to build measures on hidden objects or fields, select **Allow build access for all objects and fields** from the Enablement page in Setup. If your company obtained an Enablement license before Summer '23, the setting is on.

When the setting is on, Enablement admins can see the names of all objects, fields, and field values while building a measure. Access to those objects and fields elsewhere in Salesforce, including the ability to view associated data within records, is still limited based on your object- or field-level security preferences.

When the setting is off, Enablement admins can't see the names of any hidden objects, fields, or field values when building the measure.

SEE ALSO:

[Salesforce Help: Assign Permissions to Your Enablement Team](#)

[Salesforce Help: Considerations for Setting Up Enablement](#)

[Salesforce Help: Control Who Sees What](#)

## Assign Users to Enablement Programs More Efficiently

Get more tasks done while you wait for Enablement program assignments to complete, and start integrating Enablement with Salesforce development tools that your company already uses. When assigning a program to 11 or more users at a time, Enablement admins now receive email confirmation instead of having to wait in the assignment window. Or, automate program assignment with an invocable action, which Enablement admins can use to assign a program to users based on criteria that you specify.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions with Sales Cloud, Service Cloud, Financial Services Cloud, Health Cloud, and Salesforce Platform. An Enablement add-on license is required.

**How:** Asynchronous program assignment is triggered when an Enablement admin assigns 11 or more users.

For automated program assignment, determine how you want to use the invocable action, either with Flow Builder, Apex, or REST API.

SEE ALSO:

[Salesforce Help: Assign Users to Enablement Programs Manually](#)

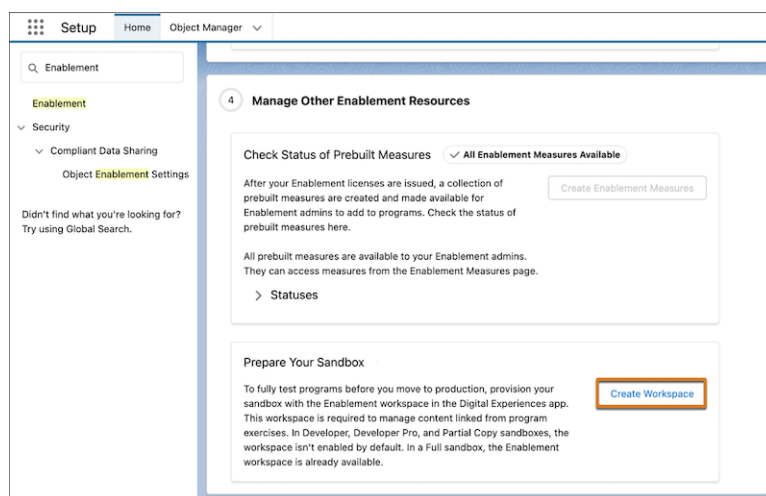
[Salesforce Help: Automating Enablement Program Assignment](#)>

## Test Enablement in All Sandbox Types More Easily

Add more robust quality assurance to your Enablement rollout by ensuring that your sandbox has all the resources necessary for testing end-to-end behavior. In a Developer, Developer Pro, or Partial Copy sandbox, you can now easily provision the Enablement workspace in Digital Experiences, which is required for managing content linked from exercises in Enablement programs. Without this workspace, you can't properly test all Enablement program functionality before you deploy to production. Previously, only a Full sandbox included this workspace by default.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions with Sales Cloud, Service Cloud, Financial Services Cloud, Health Cloud, and Salesforce Platform. An Enablement add-on license is required.

**How:** On the Enablement page in Setup in a sandbox, the Manage Other Enablement Resources section includes a Prepare Your Sandbox step. If you're using a Developer, Developer Pro, or Partial Copy sandbox, click **Create Workspace**.



This option is available only one time per sandbox. If the sandbox is a Full sandbox, this step shows that the workspace is already created.

SEE ALSO:

[Salesforce Help: Sandbox Support for Enablement](#)

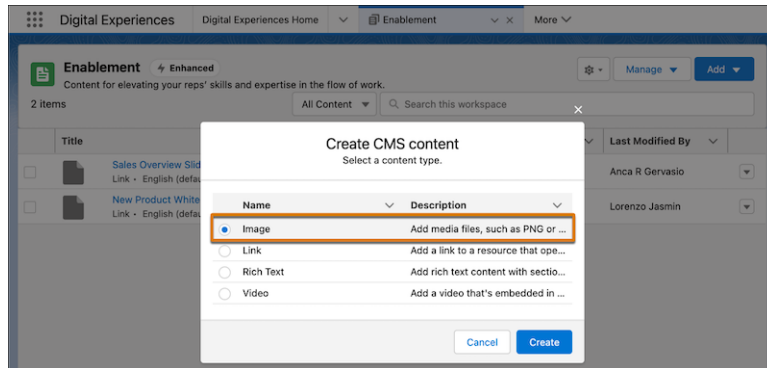
## Manage Images for Rich Text Content in Lesson Exercises More Efficiently

Create, publish, and revise images that appear in Lesson exercises in Enablement programs with fewer clicks and headaches. The Create CMS content window in the Enablement workspace in Digital Experiences includes a new Image content type. Previously, content creators could insert and publish images only when editing and publishing a Rich Text content type, which is used with Lesson exercises. Content creators can now manage images independently from the Rich Text content types where the images are used. For example, a content creator can add and publish an image first and then reference the published image in rich text.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions with Sales Cloud, Service Cloud, Financial Services Cloud, Health Cloud, and Salesforce Platform. An Enablement add-on license is required.

**Who:** This change is available to users with the Content Manager contributor role in the Enablement workspace in Digital Experiences.

**How:** Select the **Image** content type in the Create CMS content window in the Enablement workspace.



The Image content type doesn't correspond to an exercise type in Program Builder. You can't create a record of the Image content type by itself directly from Program Builder unless you add the image as part of a Lesson exercise.

#### SEE ALSO:

[Salesforce Help: Add and Publish an Image for Rich Text Content from Digital Experiences](#)

[Salesforce Help: Create Rich Text for an Exercise from Digital Experiences](#)

[Salesforce Help: Guidelines for Digital Experiences Content in Enablement Programs](#)

## Other Changes in Enablement

Salesforce admins, Enablement teams, and content creators benefit from other enhancements throughout the Enablement workflow.

**Where:** These changes apply to Lightning Experience in Enterprise, Performance, and Unlimited editions with Sales Cloud, Service Cloud, Financial Services Cloud, Health Cloud, and Salesforce Platform. An Enablement add-on license is also required.

#### How:

- Help your sales reps close more deals and sell new products by creating programs using these new program templates.
  - Win More Opportunities
  - Increase Deal Size
  - Sell a New Product
- Program templates now include sections that logically arrange milestones and exercises.
- To help Enablement admins create focused programs that drive user engagement, outcome-based programs can now add up to nine milestones. Programs without distinct outcomes can add up to 10 milestones.
- One prebuilt measure, Number of Calls with Talk Ratio Less Than 50%, now follows calls in which the call owner is also the call creator. Previously, the call owner got credit only when they were an attendee on the call, but never when they were also the call creator. If your company was using Enablement before Summer '23, the prebuilt measure continues to exclude calls made by call owners when they created the call. We recommend that you clone the measure and manually update the clone to reflect the new behavior. On the Unified Voice Call Participant related object, change the Participant Type field filter from the Attendee field to the From field.
- To make building measures more intuitive for Enablement admins, these fields on the Enablement Measure object are renamed.

- Measure Method is now called Calculation Method.
- Field to Sum is now called Field for Calculation.
- The guidance set that's assigned to Enablement admins and is available in the Guidance Center—Build, Launch, and Track Programs—includes a new step. The new step links to a Salesforce Help topic that includes tips for planning your programs. If an Enablement admin previously completed all steps in this guidance set, the Guidance Center now shows that the guidance set is incomplete until the Enablement admin completes the added step.

**SEE ALSO:**

[Salesforce Help: Create Enablement Programs Based on Templates](#)

[Salesforce Help: Prerequisites for Enablement Program Templates](#)

[Salesforce Help: Check Out Prebuilt Enablement Measures](#)

[Salesforce Help: Create and Activate Enablement Measures](#)

## Guidance Center and In-App Guidance

Enjoy more flexibility and precision when you create prompts that appear for users as they navigate Lightning Experience. Deliver a more personalized experience for Salesforce admins, Enablement admins and users, and Starter Edition users who access content in the Guidance Center.

**IN THIS SECTION:**

[Personalize the Size and Placement of the Guidance Center Panel](#)

Remove barriers to productivity in your flow of work by personalizing how the Guidance Center appears on your screen. Previously, the Guidance Center panel overlapped part of the Lightning Experience page, and you had to close and reopen the Guidance Center when switching between working and learning. Now, you can pin the Guidance Center so that it appears side by side with the Lightning Experience page with no overlap. You can also toggle the width of the Guidance Center for videos and Trailhead units, depending on your preference for viewing those content types.

[Provide More Detailed In-App Guidance with Targeted Prompts on Record Fields](#)

Add more granular, specific guidance for users who onboard to your Salesforce implementation. You can now target any field on a record page, dynamic form, or the Create window in a targeted prompt that you create with In-App Guidance Builder.


[Show Salesblazer Content in the Guidance Center](#)

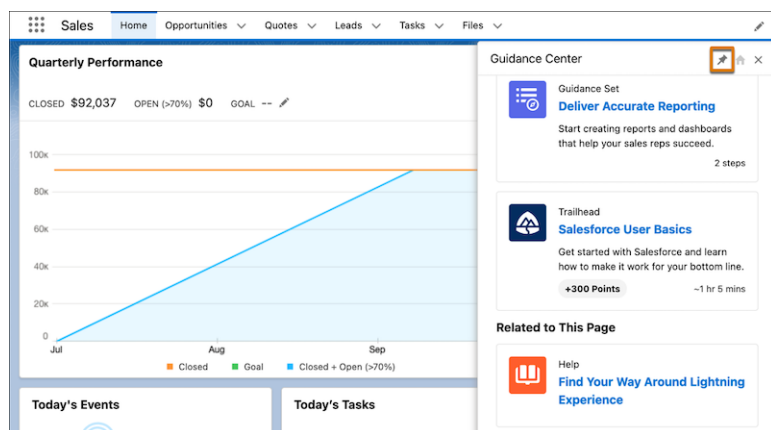
Inform and inspire your company's sales professionals with the latest insights, expertise, and pro tips from their peers, delivered in the flow of work in Salesforce. The Guidance Center now includes a Salesblazer section that shows content authored by sales leaders, sellers, and sales operations professionals. Clicking an item in the Salesblazer section opens the content in a new browser tab. Items remain in the Salesblazer section until the source content is refreshed, which occurs weekly on average.

## Personalize the Size and Placement of the Guidance Center Panel

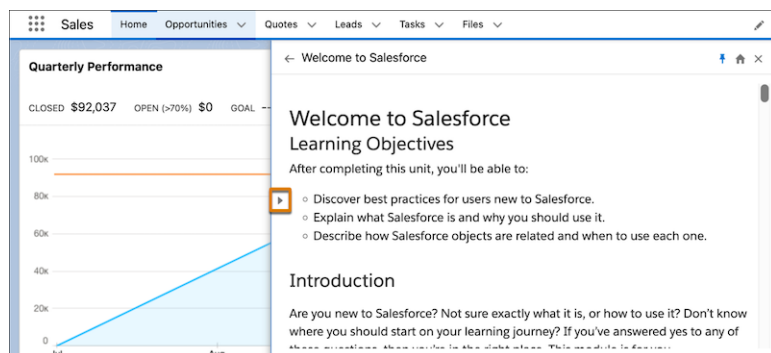
Remove barriers to productivity in your flow of work by personalizing how the Guidance Center appears on your screen. Previously, the Guidance Center panel overlapped part of the Lightning Experience page, and you had to close and reopen the Guidance Center when switching between working and learning. Now, you can pin the Guidance Center so that it appears side by side with the Lightning Experience page with no overlap. You can also toggle the width of the Guidance Center for videos and Trailhead units, depending on your preference for viewing those content types.

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

**How:** To pin the Guidance Center, click the pin icon  in the Guidance Center header. To exit the side-by-side view so that the Guidance Center panel overlaps with the Lightning Experience page again, click the pin icon again. A user's pin selection is remembered for the device and browser that they're using.



For videos and Trailhead units, the Guidance Center panel automatically expands to a larger width. To resize the Guidance Center after it expands, toggle the arrow icon.



SEE ALSO:

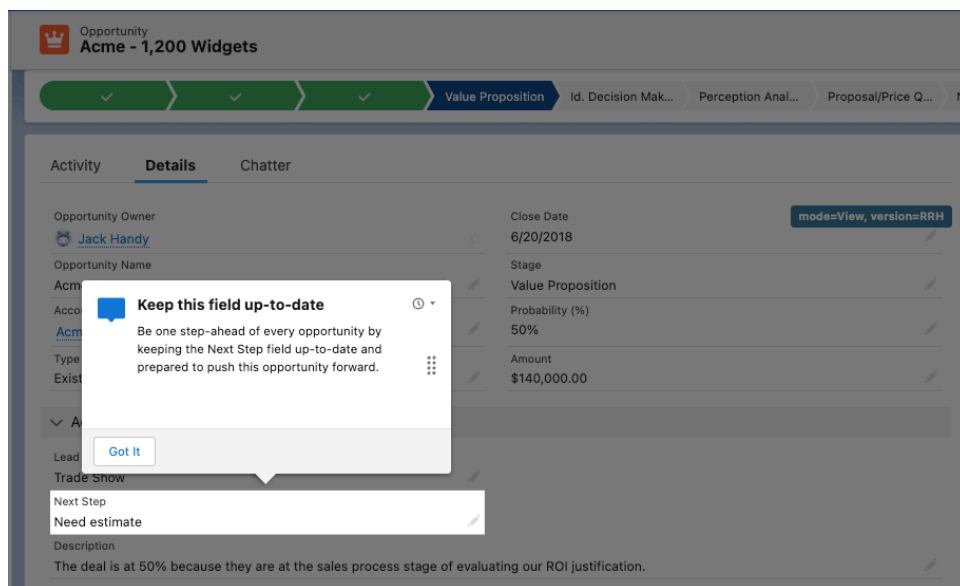
[Salesforce Help: Configuring the Size and Position of the Guidance Center](#)

## Provide More Detailed In-App Guidance with Targeted Prompts on Record Fields

Add more granular, specific guidance for users who onboard to your Salesforce implementation. You can now target any field on a record page, dynamic form, or the Create window in a targeted prompt that you create with In-App Guidance Builder.

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

**How:** In Setup, go to In-App Guidance and click **Add**. When adding one prompt, select **Single Prompt**. When adding a series of prompts, select **Walkthrough**. Select **Targeted Prompt** for the prompt type, and use Targeting Mode to target a record field.



SEE ALSO:

[Salesforce Help: Types of In-App Guidance](#)

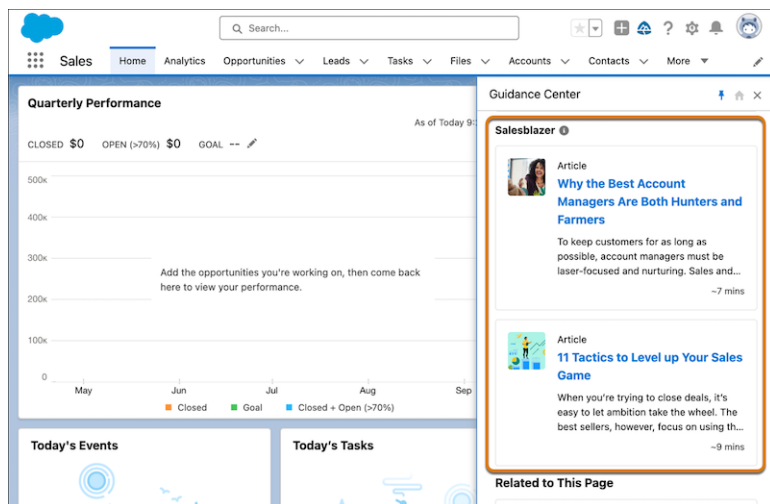
## Show Salesblazer Content in the Guidance Center

Inform and inspire your company's sales professionals with the latest insights, expertise, and pro tips from their peers, delivered in the flow of work in Salesforce. The Guidance Center now includes a Salesblazer section that shows content authored by sales leaders, sellers, and sales operations professionals. Clicking an item in the Salesblazer section opens the content in a new browser tab. Items remain in the Salesblazer section until the source content is refreshed, which occurs weekly on average.

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

**When:** The Salesblazer section in the Guidance Center is available July 2023.

**How:** If the Salesforce Suggestions for End Users option in the Guidance Center page in Setup is on, the Salesblazer section in the Guidance Center is available for all users.



Salesblazer content is available only in English.

The Guidance Center still shows suggested content from Salesforce and content that's available to users based on their role at your company, including guidance sets and items assigned in Learning Paths.

To hide the Salesblazer section from all users, turn off **Salesblazer Content** in the Guidance Center page in Setup.

SEE ALSO:

[Salesforce: Salesblazer Website](#)

[Salesforce Help: Turn Off Salesblazers Content in the Guidance Center](#)

[Salesforce Help: Explore the Guidance Center](#)

## Experience Cloud

---

Personalize your LWR sites with Expression-Based Visibility and device-based visibility settings. Discover an abundance of new and improved LWR components, including Tabs, Logo, and Knowledge Article. Migrate your Aura sites to Google Analytics 4. And enjoy a boost in performance and productivity with improved custom domains, component caching, site navigation, and more.

IN THIS SECTION:

### [Aura and LWR Sites](#)

Enjoy improvements to the Experience Builder user interface that make it easier to navigate your site, including Page Structure panel upgrades and better empty component visibility in LWR sites. Search CRM objects from your LWR sites, create better redirects with improved head markup tags, and upgrade your Aura sites with improved accessibility options.

### [Components in Experience Builder](#)

Create dynamic component visibility in your enhanced LWR sites with Expression-Based Visibility, now generally available. Build better sites with new components, including Tabs, List, and Site Logo components. Decide when to show or hide your components based on device type, and enjoy improvements to the Actions Bar and Record Detail components.

### [Developer Productivity](#)

Migrate your Aura sites to Google Analytics 4 before Summer '23. Use Lightning Web Security architecture to upgrade your Aura components. And enjoy additional site upgrades like branded toast notifications in your LWR sites, and custom property types and editors.

### [Site Performance](#)

New guidance and expanded documentation help you more easily set up and manage the custom domain that serves your Experience Cloud site. Aura sites now use the same mechanism for component loading and caching as Lightning Experience, improving site performance and cache stability. Salesforce now notifies you when you approach your portal role limit and when a membership request successfully finishes processing.

### [Security and Sharing](#)

For enhanced security, block your organization from sending emails from an unverified guest user email address. Take control of the self-registration process by disabling the standard components for self-registration on Aura and LWR sites. Get your Experience Cloud site ready for the move to Salesforce Edge Network.

### [Other Changes](#)

Learn about smaller changes that improve Experience Cloud.



## Aura and LWR Sites

Enjoy improvements to the Experience Builder user interface that make it easier to navigate your site, including Page Structure panel upgrades and better empty component visibility in LWR sites. Search CRM objects from your LWR sites, create better redirects with improved head markup tags, and upgrade your Aura sites with improved accessibility options.

### IN THIS SECTION:

#### [Search for CRM Records in LWR Sites \(Generally Available\)](#)

Your site visitors can now search CRM objects, such as cases, accounts, leads, opportunities, and knowledge articles, in LWR sites. Visitors can filter and sort the search results, making it easier to find what they need. You can customize the No Results image and the labels on your search page to complement your company's branding.

#### [Deliver Better Site Redirects with Updated Page <head> Tags](#)

Seamlessly redirect site visitors who have JavaScript disabled to your site's HTML version with new and updated head markup tags. You can configure either text-based manual redirects or automatic redirects. A manual redirect requires the site visitor to click an image or link on your site to be redirected. An automatic redirect checks the site visitor's browser settings and redirects the visitor if JavaScript is disabled. Previously, only manual redirects that included an image were supported.

#### [Navigate Your Site More Easily in Experience Builder](#)

Updates to the Experience Builder user interface make it easier to work on your sites. On Aura and LWR sites, the Page Structure panel is redesigned for greater readability and is navigable by keyboard. On LWR sites, empty components are easier to find and select.

#### [Customize the Search Component in Theme Hero Banners in Aura Sites](#)

Searches on your Aura site are now more accessible. In Experience Builder, several standard themes available for Aura sites—for example, Webster, Cypress, Citizen, Jepson—offer a Hero component with an optional search field. To adhere to accessibility standards, the Search component within the Hero now shows an outline when a site visitor clicks into it. You can opt to disable this feature.

#### [Link Tags in LWR Sites Now Use Lightning Navigation](#)

Your customers no longer experience full page reloads when navigating between LWR site pages. Lightning navigation improves page performance and is similar to navigation in Aura sites. With this change, links to external sites open in a new tab by default. Links to pages in the same site continue to open in the current tab by default.

#### [Evaluate the Quality of Leads and Opportunities with Einstein Scoring for Salesforce PRM](#)

Einstein Scoring is now available for leads and opportunities in partner portals. Use AI to score leads and opportunities by how well they fit your company's successful conversion patterns.

## Search for CRM Records in LWR Sites (Generally Available)

Your site visitors can now search CRM objects, such as cases, accounts, leads, opportunities, and knowledge articles, in LWR sites. Visitors can filter and sort the search results, making it easier to find what they need. You can customize the No Results image and the labels on your search 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.

**How:** To search CRM objects, set up a standard search page and add the Results Layout component to it. From the Results Source field, select CRM Object, and then choose which objects to include in search. After you publish the changes to your site, your visitors can search for CRM content.

SEE ALSO:

[Salesforce Help: Set Up CRM Object Search in LWR Sites](#)(can be outdated or unavailable during release preview)

## Deliver Better Site Redirects with Updated Page <head> Tags

Seamlessly redirect site visitors who have JavaScript disabled to your site's HTML version with new and updated head markup tags. You can configure either text-based manual redirects or automatic redirects. A manual redirect requires the site visitor to click an image or link on your site to be redirected. An automatic redirect checks the site visitor's browser settings and redirects the visitor if JavaScript is disabled. Previously, only manual redirects that included an image were supported.

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

**How:** To configure or edit site redirects, in Experience Builder, go to **Settings > Advanced** and click **Edit Head Markup**. Enter the markup for your preferred redirect method. To configure text-based manual redirects, use `<noscript><a href="https://www.example.com">Link Text</a></noscript>` in the page header. To configure automatic redirects based on the visitor's browser settings, use `<noscript><meta http-equiv="refresh" content="0; url=https://www.example.com"/></noscript>` in the page header.

SEE ALSO:

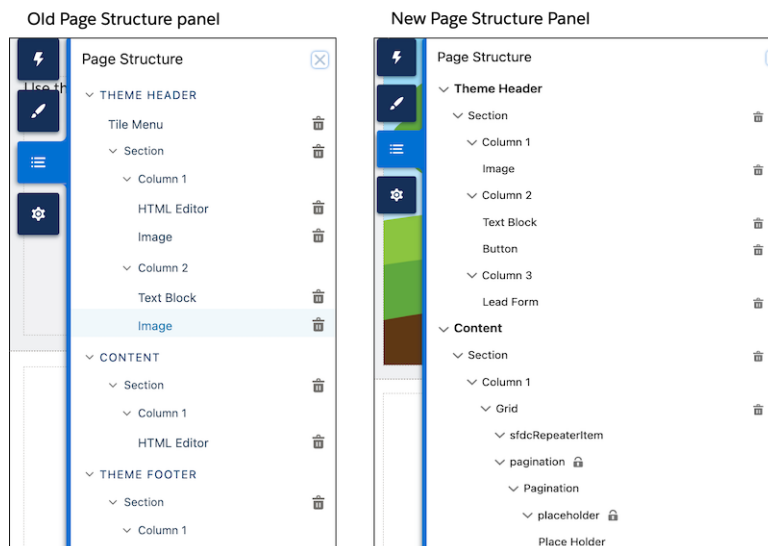
[Salesforce Help: Add Markup to the Page <head> to Customize Your Experience Builder Site](#) (can be outdated or unavailable during release preview)

## Navigate Your Site More Easily in Experience Builder

Updates to the Experience Builder user interface make it easier to work on your sites. On Aura and LWR sites, the Page Structure panel is redesigned for greater readability and is navigable by keyboard. On LWR sites, empty components are easier to find and select.

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

**How:** In Aura and LWR sites, use the tab and arrow keys on your keyboard to move around in the Page Structure panel. The panel is wider and supports up to 20 nested levels. Indents on nested items are reduced to make them easier to read.



Also in LWR sites, some Lightning web components that contained no content were difficult to find and select on the canvas. The updated user interface surrounds these components with a selectable outline and adds a sliver of space within them, so they're easier to see and work with.



#### SEE ALSO:

[Fine-Tune How Your Enhanced LWR Site Appears on Different Devices](#)

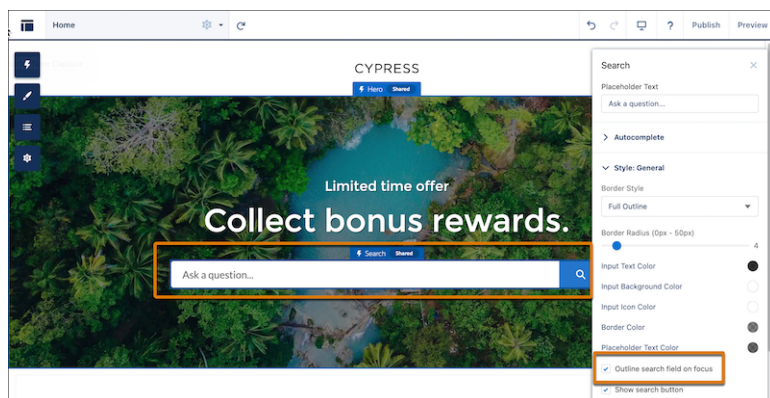
[Create Component Visibility Rules in Experience Builder \(Generally Available\)](#)

## Customize the Search Component in Theme Hero Banners in Aura Sites

Searches on your Aura site are now more accessible. In Experience Builder, several standard themes available for Aura sites—for example, Webster, Cypress, Citizen, Jepson—offer a Hero component with an optional search field. To adhere to accessibility standards, the Search component within the Hero now shows an outline when a site visitor clicks into it. You can opt to disable this feature.

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

**How:** The outline around the search field appears by default. To disable it, in Experience Builder, select the Search component within the Hero component, and deselect **Outline search field on focus**.



## Link Tags in LWR Sites Now Use Lightning Navigation

Your customers no longer experience full page reloads when navigating between LWR site pages. Lightning navigation improves page performance and is similar to navigation in Aura sites. With this change, links to external sites open in a new tab by default. Links to pages in the same site continue to open in the current tab by default.

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

## Evaluate the Quality of Leads and Opportunities with Einstein Scoring for Salesforce PRM

Einstein Scoring is now available for leads and opportunities in partner portals. Use AI to score leads and opportunities by how well they fit your company's successful conversion patterns.

**Where:** This change applies to [Aura sites](#) accessed through Lightning Experience in Enterprise and Unlimited editions.

**Who:** Lead and opportunity scoring is available for users with Partner Community and Channel Account licenses.

SEE ALSO:

[Collaborate in Real Time with PRM for Slack App \(Generally Available\)](#)

## Components in Experience Builder

Create dynamic component visibility in your enhanced LWR sites with Expression-Based Visibility, now generally available. Build better sites with new components, including Tabs, List, and Site Logo components. Decide when to show or hide your components based on device type, and enjoy improvements to the Actions Bar and Record Detail components.

IN THIS SECTION:

[Create Component Visibility Rules in Experience Builder \(Generally Available\)](#)

Make your enhanced LWR sites as dynamic as your users. With Expression Based Visibility, now generally available, you can show or hide individual components based on rules that contain a set of conditions. From the new Visibility tab on the component property panel, build rules and apply them based on User object and Profile fields. Create conditions that apply to a single component and access fields on the User and Product objects to show your components at the right time to the right users.

### [Organize Your LWR Site Pages with Tabs](#)

Use the new Tabs component to add up to five horizontal or vertical tabs to your LWR site pages. Drop any content component into a tab region to show the content that you want. Use a data bound component to show products in one tab, another tab for a button to contact support, and a third that lists your product's most amazing features.

### [Add Bulleted and Numbered Lists to Your Enhanced LWR Sites](#)

Use the new List component to add descriptions or specifications that enumerate all the reasons why your service is the best.

### [Add Your Logo to LWR Sites](#)

The Site Logo is typically used to personalize login and registration pages. The Site Logo component replaces the Community Logo component. Published sites continue to use the Community Logo component. If you want to use the new Site Logo component, delete the Community Logo and drag the Site Logo to the page. For new sites, the Community Logo is no longer available.

### [Fine-Tune How Your Enhanced LWR Site Appears on Different Devices](#)

Give your users a personalized experience by hiding non-business critical components. In enhanced LWR sites, site builders can customize which components are shown or hidden for each device type—mobile, tablet, or desktop. You can also tailor the margins and padding around individual components for each device type.

### [View Knowledge Articles in LWR Sites with the Knowledge Article Component](#)

With the new Knowledge Article component, site visitors can view knowledge articles from their LWR sites. Previously, the Knowledge Article component was available only in Aura sites.

### [Add to the Actions Bar in LWR Sites \(Beta\)](#)

Help your LWR site users take more action on Salesforce records with increased action support in the Actions Bar component. Show a custom set of Salesforce actions on an object detail page and then customize the bar to match your branding. In this release, you can add the Edit standard action and Create a Record and Update a Record quick actions to the Actions Bar. Previously, only headless Lightning web component quick actions were supported.

### [Update Your Settings and Do More with Record Detail Components in LWR Sites \(Beta\)](#)

This beta feature includes some improvements since the last release and important changes that require you to reenter your Record Detail component settings in enhanced LWR sites. Your customers and partners can now more easily edit Salesforce records on desktop and mobile from your LWR site's Record Detail component. They can edit inline on desktop or mobile using a fine pointer device, like a stylus. Add the Edit option on the Action Bar (beta) so users can open a full edit window when they select a record. Previously, they could edit records only inline and on desktop.

## Create Component Visibility Rules in Experience Builder (Generally Available)

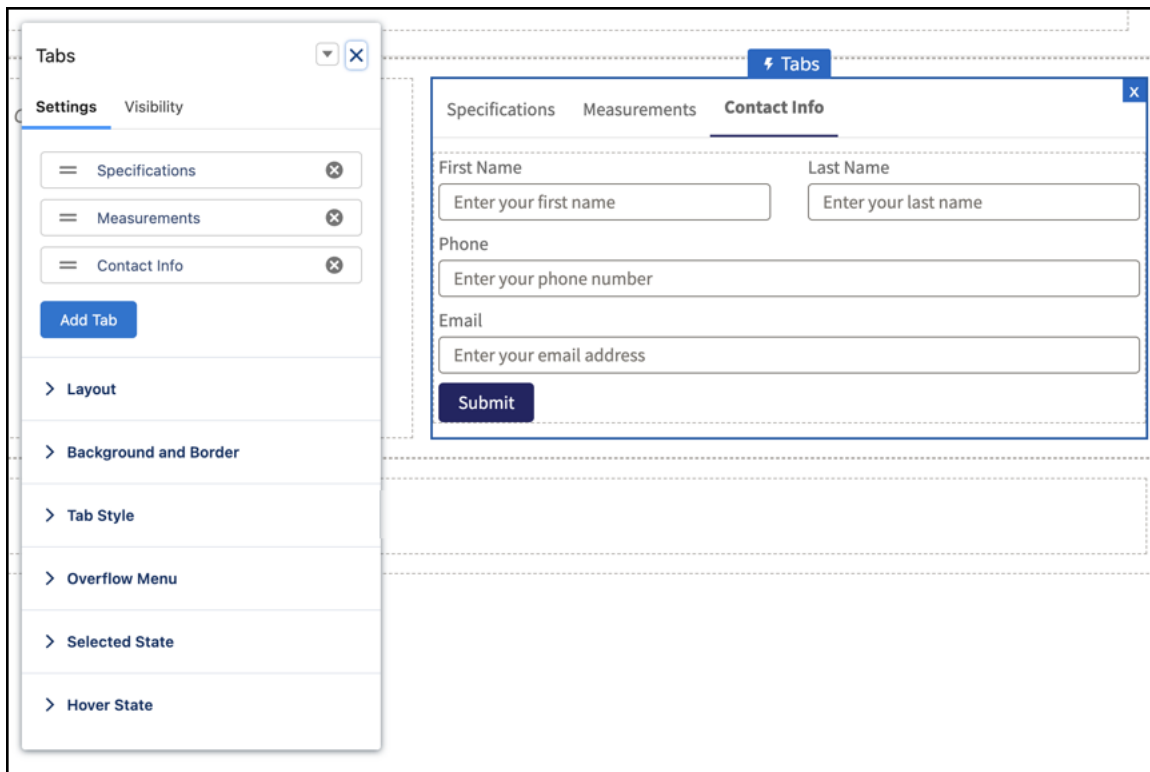
Make your enhanced LWR sites as dynamic as your users. With Expression Based Visibility, now generally available, you can show or hide individual components based on rules that contain a set of conditions. From the new Visibility tab on the component property panel, build rules and apply them based on User object and Profile fields. Create conditions that apply to a single component and access fields on the User and Product objects to show your components at the right time to the right users.

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

## Organize Your LWR Site Pages with Tabs

Use the new Tabs component to add up to five horizontal or vertical tabs to your LWR site pages. Drop any content component into a tab region to show the content that you want. Use a data bound component to show products in one tab, another tab for a button to contact support, and a third that lists your product's most amazing features.

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

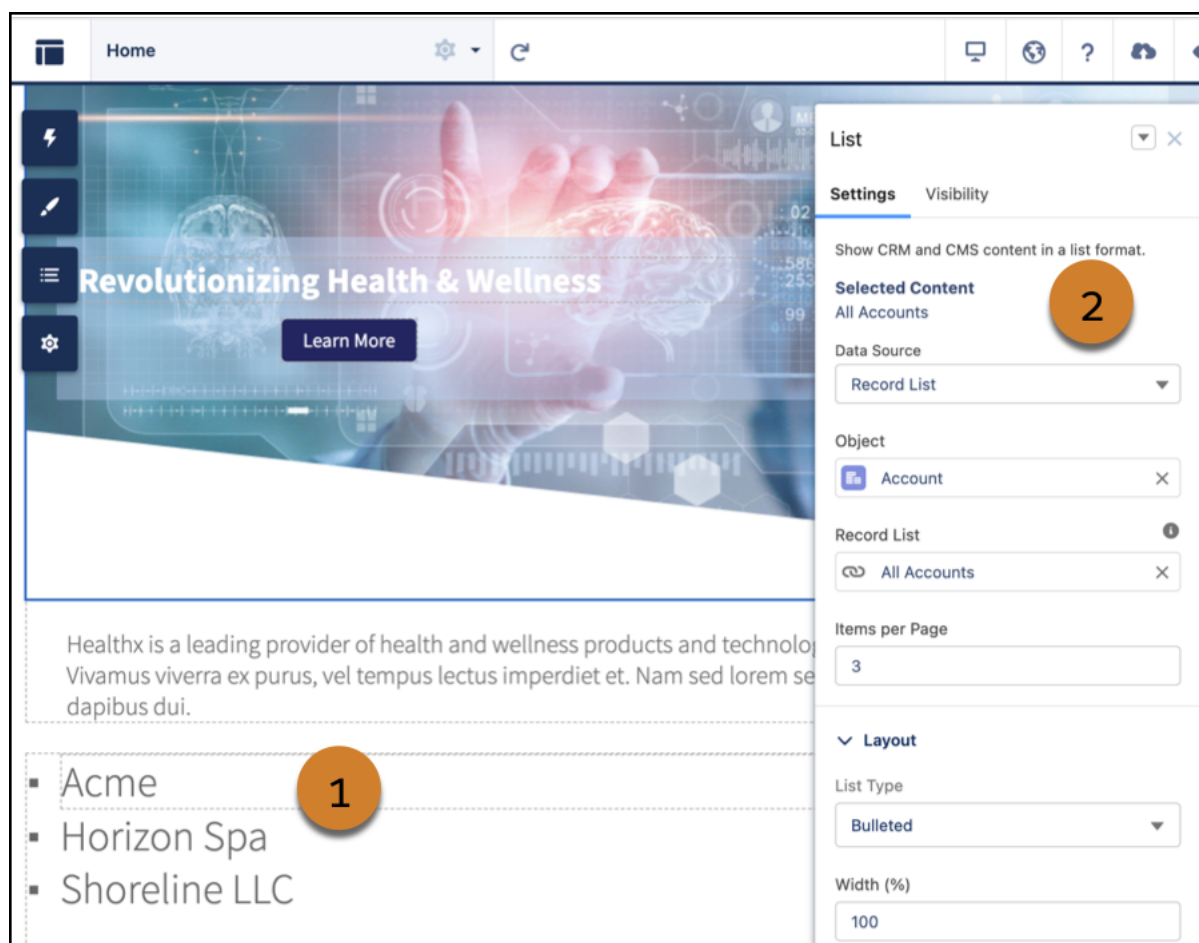


## Add Bulleted and Numbered Lists to Your Enhanced LWR Sites

Use the new List component to add descriptions or specifications that enumerate all the reasons why your service is the best.

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

**How:** A list dynamically populates (1) with CMS or CRM data based on your site's needs when you add a content component within the List component. Control the look and feel of the list data with ease from the property panel (2).



## Add Your Logo to LWR Sites

The Site Logo is typically used to personalize login and registration pages. The Site Logo component replaces the Community Logo component. Published sites continue to use the Community Logo component. If you want to use the new Site Logo component, delete the Community Logo and drag the Site Logo to the page. For new sites, the Community Logo is no longer available.

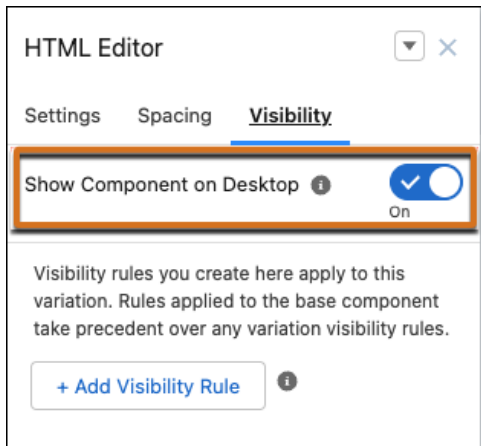
**Where:** This change applies to [LWR sites](#) accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

## Fine-Tune How Your Enhanced LWR Site Appears on Different Devices

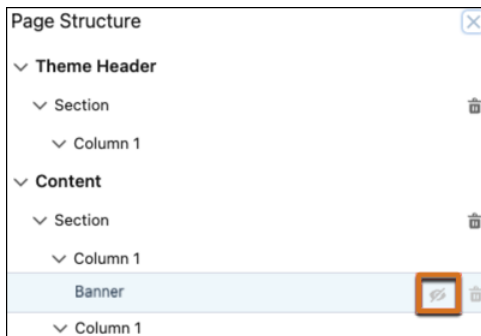
Give your users a personalized experience by hiding non-business critical components. In enhanced LWR sites, site builders can customize which components are shown or hidden for each device type—mobile, tablet, or desktop. You can also tailor the margins and padding around individual components for each device type.

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

**How:** In Experience Builder, select a view mode in the top navigation bar, and then select a component on the canvas. From the component property panel, click the Visibility tab. Use the new Show Component toggle to show or hide the component on the selected view mode.

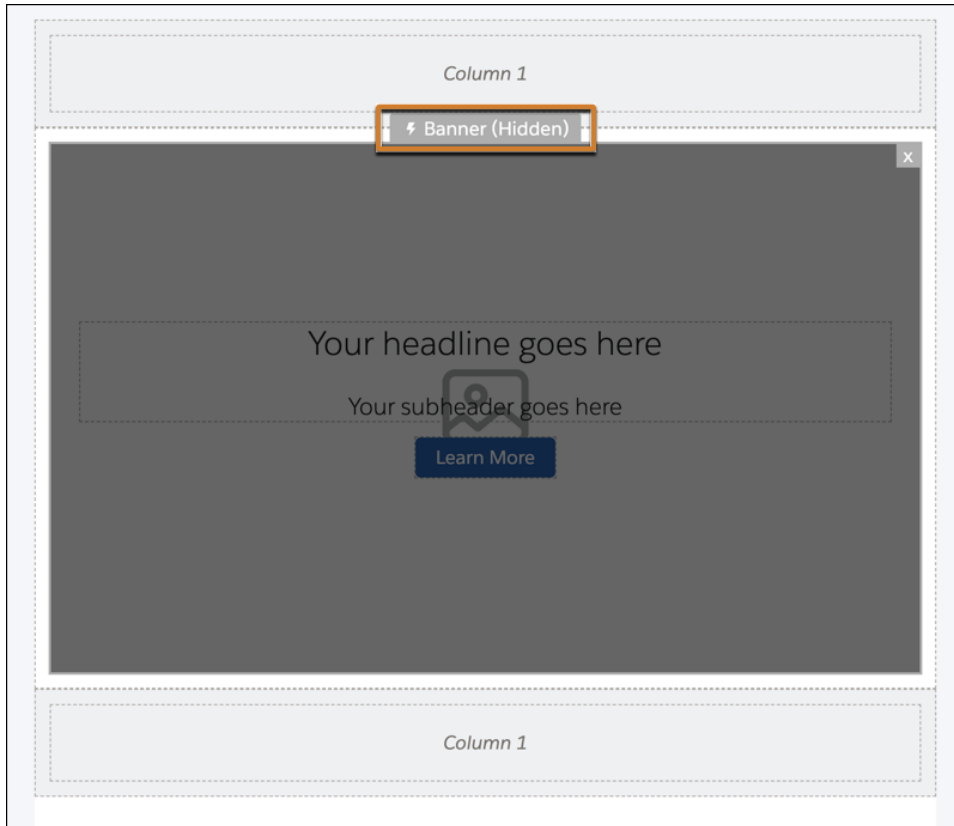


The Page Structure panel displays an indicator to show which components are hidden using the Show Component toggle.



When you click the name of a hidden component in the panel, the canvas shows an overlay of the component and identifies it as hidden.





You can also hide components with expression-based visibility settings.

SEE ALSO:

[Create Component Visibility Rules in Experience Builder \(Generally Available\)](#)

## View Knowledge Articles in LWR Sites with the Knowledge Article Component

With the new Knowledge Article component, site visitors can view knowledge articles from their LWR sites. Previously, the Knowledge Article component was available only in Aura sites.

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


SEE ALSO:

[Customize Knowledge Articles with the Knowledge Article Component](#)

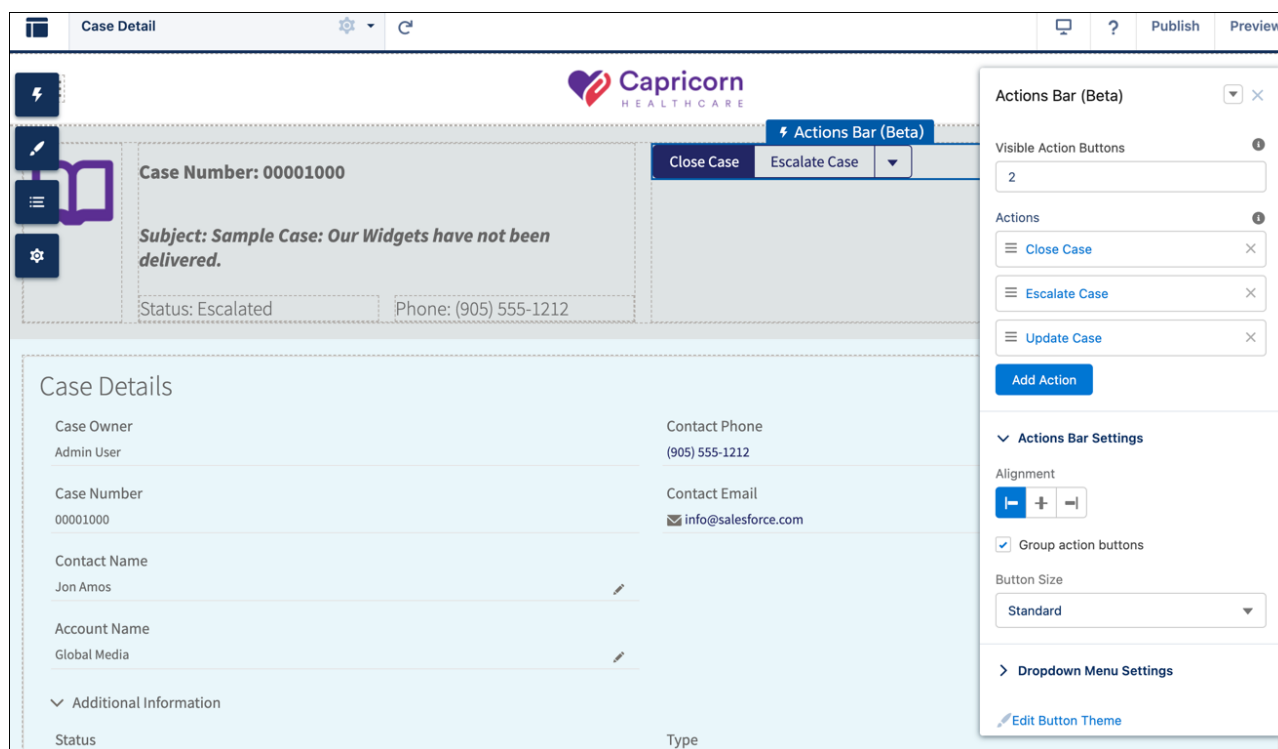
## Add to the Actions Bar in LWR Sites (Beta)

Help your LWR site users take more action on Salesforce records with increased action support in the Actions Bar component. Show a custom set of Salesforce actions on an object detail page and then customize the bar to match your branding. In this release, you can add the Edit standard action and Create a Record and Update a Record quick actions to the Actions Bar. Previously, only headless Lightning web component quick actions were supported.

**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**. Drag the Actions Bar component anywhere on an object detail page and add your actions to the bar.




SEE ALSO:

[Salesforce Help: Actions Bar Considerations in LWR Sites \(Beta\) \(can be outdated or unavailable during release preview\)](#)

## Update Your Settings and Do More with Record Detail Components in LWR Sites (Beta)

This beta feature includes some improvements since the last release and important changes that require you to reenter your Record Detail component settings in enhanced LWR sites. Your customers and partners can now more easily edit Salesforce records on desktop and mobile from your LWR site's Record Detail component. They can edit inline on desktop or mobile using a fine pointer device, like a stylus. Add the Edit option on the Action Bar (beta) so users can open a full edit window when they select a record. Previously, they could edit records only inline and on desktop.

**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](#).

**Why:** More changes to the Record Detail component.

- Vertical Padding and Horizontal Padding settings were removed from the Settings tab of the property panel. On enhanced LWR sites, those settings have moved to the Spacing tab of the property panel.



**Important:** To preserve your Vertical and Horizontal Padding settings on enhanced LWR sites, reenter them on the Spacing tab in the Padding or Margin fields.

- Enable autocomplete on standard addresses so LWR site users can enter text on standard address fields and see possible matching addresses in a picklist. Previously, this setting was available only to Salesforce App and Aura site users.
- Select a title text or an expression from a dropdown list instead of entering it.
- While a page is loading, a spinner appears.
- To reduce confusion, you can't click the Submit or Cancel button while saving.
- After you save a form, a green success message appears.

#### SEE ALSO:

[Salesforce Help: Standard Components for the Build Your Own \(LWR\) Template \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Autocomplete on Standard Addresses \(can be outdated or unavailable during release preview\)](#)

## Developer Productivity

Migrate your Aura sites to Google Analytics 4 before Summer '23. Use Lightning Web Security architecture to upgrade your Aura components. And enjoy additional site upgrades like branded toast notifications in your LWR sites, and custom property types and editors.

#### IN THIS SECTION:

##### [Migrate Aura Sites to Google Analytics 4 \(Release Update\)](#)

This update upgrades the JavaScript library for all of 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, you must manually update the Google Analytics Tracking ID for each of your Aura sites 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 connected to Google Analytics with a UA-ID. This update was first available in Spring '23 and is enforced in Summer '23.

##### [Use Lightning Web Security in Aura Sites \(Generally Available\)](#)

Lightning Web Security (LWS) for Aura components is now generally available. LWS is a new security architecture for Lightning components that's gradually replacing Lightning Locker and was made generally available for Lightning web components in Spring '22. In Experience Cloud, LWS affects Lightning web components and Aura components in Aura sites. LWS doesn't affect LWR sites, which use their own instance of LWS.

##### [Display Branded Toast Notifications in LWR Sites](#)

Custom Lightning web components in LWR sites can now send a toast notification to provide information or alert users. And with the addition of `--dxp` styling hooks that map to new branding properties in the Theme panel in Experience Builder, site builders can quickly update the style of notifications to match the site's style.

##### [Manage Toast Notifications with a Toast Container \(Beta\)](#)

Fire and manage a list of toast notification message components, including their position, with `lightning/toastContainer` for LWR sites. The module creates a container that handles and displays your page-level toast notifications.

### [Improve Performance of Connect APIs in Enhanced LWR Sites \(Beta\)](#)

Take advantage of improved performance for Connect REST API calls made from Lightning web components in your enhanced LWR sites. In orgs created in Summer '23 and later, this feature is enabled by default in enhanced LWR sites. You can access the Improve performance of Connect APIs in your LWR site (Beta) setting in the Preferences section of your site's Administration workspace.

### [Create Custom Property Types and Editors for Lightning Web Components in LWR Sites \(Beta\)](#)

Make your custom Lightning web components highly configurable in Experience Builder—add custom property editors and property types to the components. This feature, which is now beta, includes some changes since the developer preview release. Custom Lightning web components are even easier to configure and share, and you can deploy property types via the ExperiencePropertyTypeBundle metadata API type using Salesforce CLI commands.

### [ExperienceBundle Supports Only Object Pages Available in Experience Builder](#)

When deploying an Aura or non-enhanced LWR site using the ExperienceBundle metadata type in API version 58.0 and later, custom pages are supported only for objects that are available in Experience Builder. Previously, you could include custom pages for any object, even if the object was unsupported in Experience Builder. Older API versions continue to support custom pages for all objects.

### [Tailor Your Identity Experiences in Third-Party Apps with New and Improved Headless Identity Features](#)

Take full control of your registration and forgot password experiences in a third-party app while relying on Customer Identity for authentication. Whether you want to create an app that complements your Experience Cloud site or you want to use Customer Identity solely as an identity service, there's a solution for you in Headless Identity APIs.

## Migrate Aura Sites to Google Analytics 4 (Release Update)

This update upgrades the JavaScript library for all of 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, you must manually update the Google Analytics Tracking ID for each of your Aura sites 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 connected to Google Analytics with a UA-ID. This update was first available in Spring '23 and is enforced in Summer '23.

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

**When:** This update was first available in Spring '23 and is enforced in Summer '23. To get the major release upgrade date for your instance, go to [Trust Status](#), search for your instance, and click the maintenance tab.

**How:** After you apply this update, all your Aura sites use the gtag.js library. If your Aura sites use the gtag.js library already, 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 Is Going Away](#)

[Release Updates](#)

## Use Lightning Web Security in Aura Sites (Generally Available)

Lightning Web Security (LWS) for Aura components is now generally available. LWS is a new security architecture for Lightning components that's gradually replacing Lightning Locker and was made generally available for Lightning web components in Spring '22. In Experience Cloud, LWS affects Lightning web components and Aura components in Aura sites. LWS doesn't affect LWR sites, which use their own instance of LWS.

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

**Why:** LWS is controlled by the **Use Lightning Web Security for Lightning web components and Aura components** setting in Session Settings in Setup. With this org-level setting, an admin can enable LWS to be used throughout the org instead of Lightning Locker.

In Experience Cloud, this org-level setting affects Aura sites specifically because when LWS is enabled in the org, LWS replaces Lightning Locker at the site level. So if you enable the Lightning Locker setting in Experience Builder for an Aura site, you're actually enabling LWS.

LWR sites have their own instance of LWS, so the org setting for LWS has no effect on LWR sites. If you disable Lightning Locker in the LWR site, the site's instance of LWS is disabled, even if LWS is enabled in the org.

### SEE ALSO:

[Use Lightning Web Security for Lightning Web Components and Aura Components \(Generally Available\)](#)

[Experience Cloud Developer Guide: Develop Secure Experience Builder Sites: CSP, Lightning Locker, and LWS \(can be outdated or unavailable during release preview\)](#)

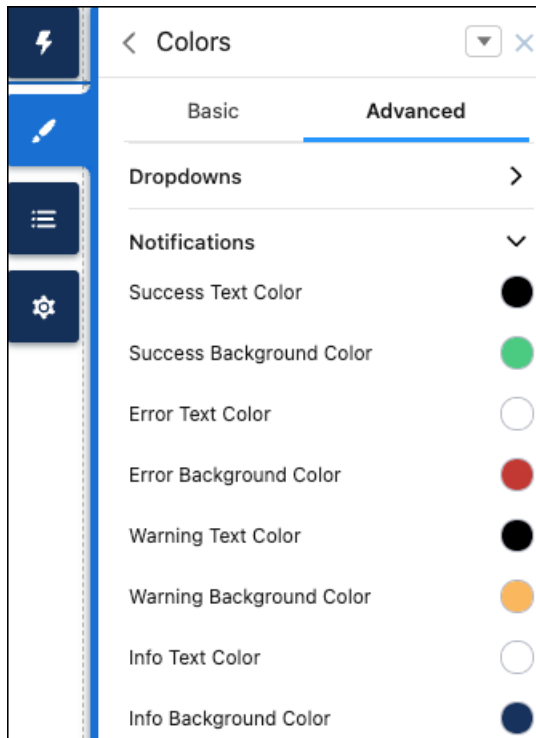
## Display Branded Toast Notifications in LWR Sites

Custom Lightning web components in LWR sites can now send a toast notification to provide information or alert users. And with the addition of `--dxp` styling hooks that map to new branding properties in the Theme panel in Experience Builder, site builders can quickly update the style of notifications to match the site's style.

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

**Why:** Now the `--dxp-g-success`, `--dxp-g-destructive`, `--dxp-g-warning`, and `--dxp-g-info` styling hooks are supported in the Theme panel. The Advanced section of the Color tab includes Success, Error, Warning, and Info style properties that map directly to these `--dxp` styling hooks.

For example, if a user updates the Success Background Color property in the Theme panel, the system automatically updates any Lightning web component that uses the hooks associated with that property.



SEE ALSO:

[Manage Toast Notifications with a Toast Container \(Beta\)](#)

## Manage Toast Notifications with a Toast Container (Beta)

Fire and manage a list of toast notification message components, including their position, with `lightning/toastContainer` for LWR sites. The module creates a container that handles and displays your page-level toast notifications.

**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:** Use the `maxToasts` attribute to set the maximum number of toasts in the container. Use `containerPosition` to position the container, and use `toastPosition` to position the toast components within it.

```
// c/myApp.js
import { LightningElement } from 'lwc';
import ToastContainer from 'lightning/toastContainer';

export default class MyApp extends LightningElement {
  connectedCallback() {
    const toastContainer = ToastContainer.instance();
    toastContainer.maxToasts = 5;
    toastContainer.toastPosition = 'top-right';
  }
}
```

The `lightning/toastContainer` module organizes existing toast components, such as messages generated from the `lightning/platformShowToastEvent` module.

SEE ALSO:

[Component Library](#)

## Improve Performance of Connect APIs in Enhanced LWR Sites (Beta)

Take advantage of improved performance for Connect REST API calls made from Lightning web components in your enhanced LWR sites. In orgs created in Summer '23 and later, this feature is enabled by default in enhanced LWR sites. You can access the Improve performance of Connect APIs in your LWR site (Beta) setting in the Preferences section of your site's Administration workspace.

**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:

[New and Changed Objects](#)

## Create Custom Property Types and Editors for Lightning Web Components in LWR Sites (Beta)

Make your custom Lightning web components highly configurable in Experience Builder—add custom property editors and property types to the components. This feature, which is now beta, includes some changes since the developer preview release. Custom Lightning web components are even easier to configure and share, and you can deploy property types via the `ExperiencePropertyTypeBundle` metadata API type using Salesforce CLI commands.

**Where:** This change applies to [LWR sites](#) accessed through 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:** Several attributes are now enabled for custom component properties.

- You can add the `translatable` attribute to properties with a custom property type whose underlying JSON schema type is string. You can translate the values in these properties into all your site languages.
- Custom labels are now supported for a custom property type's title and description fields. You can use custom labels to add translations of the title and description into all your site languages.
- On custom property types with an underlying JSON schema type of type string, integer, or number, you can specify the `exposedTo` and `screenResponsive` attributes for a property. Now you can configure values for a custom property that are tailored to different screen sizes.
- In a component with properties that reference custom property types, you can reference the `Color` and the `ContentReference` types. No need to create a selector for color or content references from scratch.

In other changes:

- You can now use source or project commands in the Salesforce CLI to deploy an `ExperiencePropertyTypeBundle`. No more creating a .zip file and using `mdapi` commands in the CLI—you can use fewer steps and more convenient commands.

- Packaging is supported for the `ExperiencePropertyTypeBundle` metadata type, which describes property types, and for Lightning web components that reference a custom property type or property editor. Now you can easily distribute components that contain custom property types or editors to other users. However, if your component is in a managed package, and you upgrade the package, your users must uninstall the package and reinstall the revised version.
  - `ExperienceBundle` and `DigitalExperienceBundle` deployments validate property values for custom property types. When a site builder enters an invalid value for a custom property type, a message flags the error.
  - The syntax to reference a custom property editor has changed. In Spring '23 the syntax was `editor = "c__myCustomEditor"`. In Summer '23, specify `editor = "c/myCustomEditor"`.
  - The way to specify a property renderer override for a whole property type is changed. Now it's clearer to developers which lines in `design.json` files are property editor overrides.
-  **Important:** For previous developer preview participants, some components with custom property types or editors that you built can be incompatible with the metadata in Summer '23. We recommend that you delete these custom components and types and then redeploy them so that they work as intended for your site builders.

**SEE ALSO:**

[Metadata API](#)

[External Link: Custom Property Types and Property Editors \(Beta\) \(can be outdated or unavailable during release preview\)](#)

[External Link: Custom Property Types and Editors — Quick Start Guide \(Beta\) \(can be outdated or unavailable during release preview\)](#)

[LWR Sites for Experience Cloud: Create a Multilingual LWR Site \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Make a Custom LWR Component Screen-Size Responsive \(can be outdated or unavailable during release preview\)](#)

[Salesforce CLI Command Reference: source Commands \(can be outdated or unavailable during release preview\)](#)

## ExperienceBundle Supports Only Object Pages Available in Experience Builder

When deploying an Aura or non-enhanced LWR site using the `ExperienceBundle` metadata type in API version 58.0 and later, custom pages are supported only for objects that are available in Experience Builder. Previously, you could include custom pages for any object, even if the object was unsupported in Experience Builder. Older API versions continue to support custom pages for all objects.

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

## Tailor Your Identity Experiences in Third-Party Apps with New and Improved Headless Identity Features

Take full control of your registration and forgot password experiences in a third-party app while relying on Customer Identity for authentication. Whether you want to create an app that complements your Experience Cloud site or you want to use Customer Identity solely as an identity service, there's a solution for you in Headless Identity APIs.

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

**SEE ALSO:**

[Take the Reins on Your User Registration Experiences with Headless Registration](#)

[Improve Security for the Headless Forgot Password Flow](#)



## Site Performance

New guidance and expanded documentation help you more easily set up and manage the custom domain that serves your Experience Cloud site. Aura sites now use the same mechanism for component loading and caching as Lightning Experience, improving site performance and cache stability. Salesforce now notifies you when you approach your portal role limit and when a membership request successfully finishes processing.

### IN THIS SECTION:

#### [Learn More About Custom Domain Setup and Maintenance with Expanded Content](#)

With a custom domain, you provide your users a branded experience by serving your Experience Cloud sites on a custom domain that you own, such as <https://www.example.com>. Whether you're new to custom domains or a seasoned pro, check out the expanded documentation for this recommended feature. The new learning map guides you through planning, working with your DNS and service providers, setting up your domain and custom URLs, and maintaining your domain.

#### [Set Up a Custom Domain with Confidence with Improved In-App Guidance](#)

To help you configure DNS and any third-party services for your custom domain that serves your Experience Cloud sites, the Domains Setup page includes improved guidance with links to the updated documentation. Because HTTPS is required, the labels for the HTTPS options are updated. To help prevent disruption, you see a warning if the domain name already serves a site in another org. And to help you troubleshoot potential DNS issues, when you view your domain details, Salesforce validates that the domain points to your org.

#### [Get Improved Component Caching in Aura Sites](#)

To improve performance, Experience Cloud now uses the same loading and caching mechanism for Aura sites that Lightning Experience uses. This mechanism allows caching static content for the Lightning Component framework on content delivery networks (CDN), in addition to client-side browser caching.

#### [Use Dynamic Redirect Rules in LWR Sites \(Beta\)](#)

With dynamic rules, you can redirect users from your site to an LWR site URL—without any coding. Configure dynamic URL redirect rules that use a pattern to identify a URL from your site and redirect it to an LWR site. Use mapping rules for large numbers of similar URLs to redirect, such as URLs in a specific category.

#### [Get Notified When You Approach Your Portal Role Limit](#)

Hitting your portal role limit can affect the availability of your site, but you can take steps to avoid this issue. Now Salesforce emails you when you reach 95% of your limit, so you have time to make adjustments before you run out of roles. When you reach your portal role limit, you can't create more users. To increase the number of roles, enable Account Role Optimization.

#### [Review Changes to Network Memberships in the Setup Audit Trail](#)

It's now easier to track site membership activity. Activating or deactivating a site, updating welcome email preferences, or adding or removing a member group are now tracked in the Setup Audit Trail.

#### [Get Notified About Membership Processing Status](#)

When a membership request finishes processing, Salesforce sends you an email notification and confirms whether processing was successful. Previously, you ran a query to determine if a membership request was processed successfully.

#### [Improve Authorization Flow Performance with JSON Web Token \(JWT\)-Based Access Tokens \(Beta\)](#)

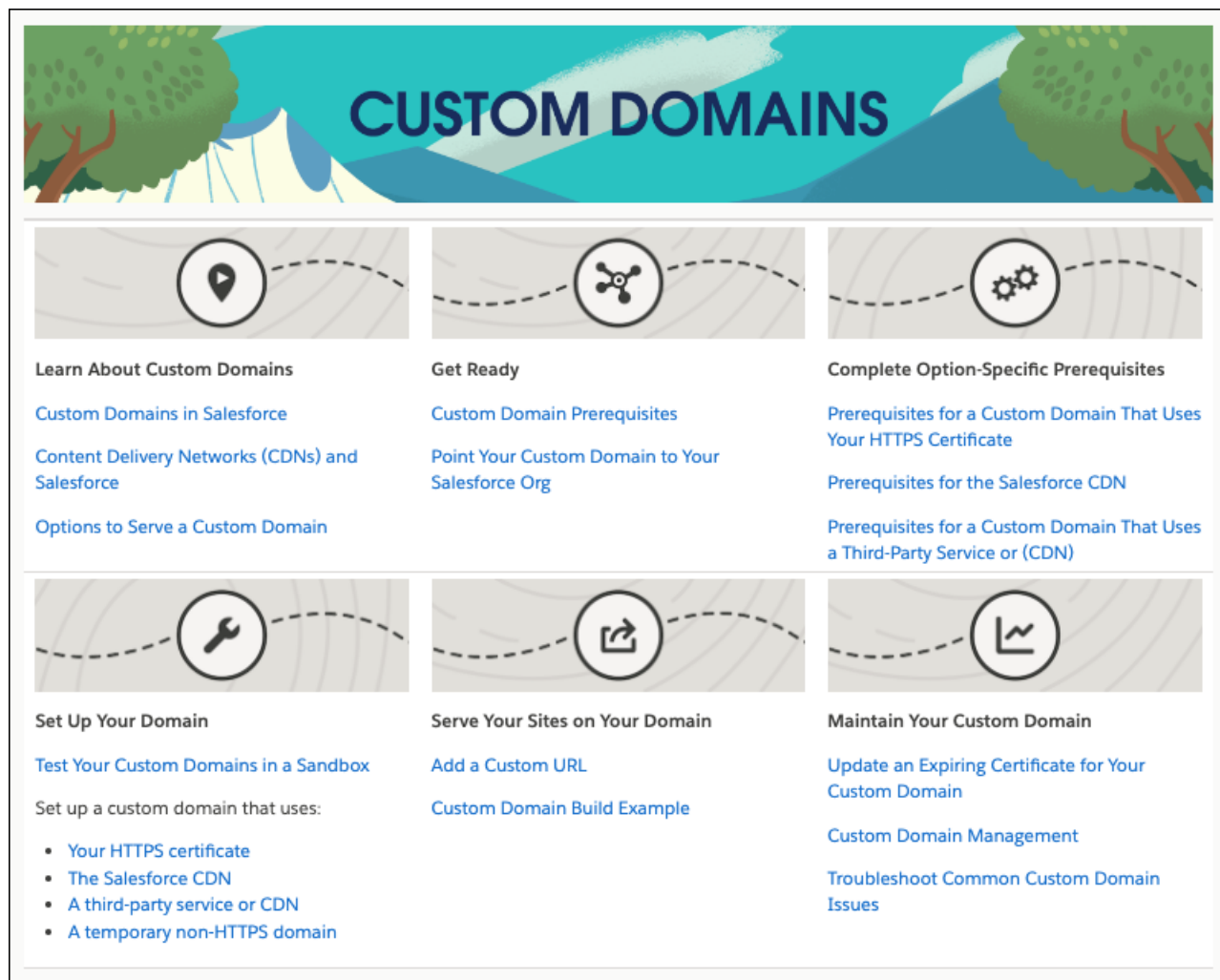
Up your authorization flow game by enabling your connected apps to issue JSON Web Token (JWT)-based access tokens. Unlike our opaque access tokens, you can locally introspect JWT-based access tokens without calling a Salesforce endpoint, making your authorization flows more efficient. Currently, JWT-based access tokens aren't supported for any Salesforce APIs.

## Learn More About Custom Domain Setup and Maintenance with Expanded Content

With a custom domain, you provide your users a branded experience by serving your Experience Cloud sites on a custom domain that you own, such as <https://www.example.com>. Whether you're new to custom domains or a seasoned pro, check out the expanded documentation for this recommended feature. The new learning map guides you through planning, working with your DNS and service providers, setting up your domain and custom URLs, and maintaining your domain.

**Where:** This change applies to [Aura](#), [LWR](#), and [Visualforce sites](#) accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, and Unlimited editions. Also available in Professional edition with Marketing Cloud Account Engagement (Pardot).

**How:** Start your journey with [Custom Domains](#) in Salesforce Help (can be outdated or unavailable during release preview).



## Set Up a Custom Domain with Confidence with Improved In-App Guidance

To help you configure DNS and any third-party services for your custom domain that serves your Experience Cloud sites, the Domains Setup page includes improved guidance with links to the updated documentation. Because HTTPS is required, the labels for the HTTPS options are updated. To help prevent disruption, you see a warning if the domain name already serves a site in another org. And to help you troubleshoot potential DNS issues, when you view your domain details, Salesforce validates that the domain points to your org.

**Where:** This change applies to [Aura](#), [LWR](#), and [Visualforce sites](#) accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, and Unlimited editions. Also available in Professional edition with Marketing Cloud Account Engagement (Pardot).

Domain

Help for this Page ?

To serve your Experience Cloud sites or Salesforce Sites on a domain that you own, add and activate the domain. Then add at least one custom URL.

Before you add or rename a domain, point your domain to [domain].00d00000000000maq.live.salesforce.com in DNS. For example, if your domain name is www.example.com, add a CNAME record in DNS for www.example.com that points to www.example.com.00d0000000000000maq.live.salesforce.com. To learn about how to verify ownership of the domain by pointing your domain to your org, see [Salesforce Help](#).

Note: The unique API Identifier for this org is 00d0000000000000maq in lowercase characters.

Domain Edit

SaveSave & NewCancel

Domain Name

HTTPS Option ⓘ

☐ Serve the domain with your HTTPS certificate on Salesforce servers

☒ Serve the domain with the Salesforce Content Delivery Network (CDN) ⓘ

This is the recommended option for custom domains that serve Digital Experiences, including those built with [Experience Cloud](#), [Commerce](#), and [Industries](#) licenses.

With this option, your domain uses a CDN partner service (Akamai) to optimize content delivery. All information that's sent to or returned by this domain is stored and transmitted through the CDN service. Visit [Salesforce Help](#) for more information, including technical limitations.

To use this option, ensure that:

- The public DNS record of the domain name points directly to [domain].00d0000000000000maq.live.salesforce.com.
- The public DNS record of the domain name includes a CNAME entry with hostname \_acme-challenge.[domain] and target \_acme-challenge.\_acme-challenge.[domain].00d0000000000000maq.live.salesforce.com.

For additional prerequisites, see [Salesforce Help](#).

☐ Use a third-party service or CDN to serve the domain  
Enter your external hostname  
☐ Use a temporary non-HTTPS domain ⓘ

Allow HSTS preloading registration ⓘ

☒ Allow HSTS preloading registration

Associated Org ⓘ

Production ▼

ⓘ After saving, you will need to activate your domain for your changes to take effect.

SaveSave & NewCancel

Domain
www.example.com
Help for this Page

### Domain Detail

An issue with the external hostname, cdn.example.com, prevents the hostname from serving this domain, www.example.com. To correct this, Click **Edit** and update the external hostname field.

Domain Name	www.example.com	Current HTTPS Option	Domain is served by an external host
Allow HSTS preloading	<input checked="" type="checkbox"/>	External Hostname	cdn.example.com
Target Hostname	MyDomainName.my.salesforce.com	Provisioning Status	Completed
Target Hostname for Salesforce	usa12.sfdc-ypmv18.salesforce.com	Associated Org	Production
Edge Network			
Created By	Admin User, 3/3/2021, 11:09 AM	Modified By	Admin User, 3/3/2021, 11:09 AM

Edit
Activate

### Custom URLs

New Custom URL

Action	Path	Status	Site Label	Site Type
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">View</a>	/vforcesite	Published	<a href="#">Site</a>	Community

If that validation returns an error, an informational message provides next steps (1). And to help you configure a domain that uses a third-party service, the Domain Detail page includes the target hostname for forwarded requests from your proxy or CDN (2). If Salesforce Edge Network isn't enabled, this page also lists the target hostname to use when your org moves to that service (2).

SEE ALSO:

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

[Knowledge Article: Review the Updated Labels for Domain HTTPS Options in Summer '23](#)

## Get Improved Component Caching in Aura Sites

To improve performance, Experience Cloud now uses the same loading and caching mechanism for Aura sites that Lightning Experience uses. This mechanism allows caching static content for the Lightning Component framework on content delivery networks (CDN), in addition to client-side browser caching.

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

**How:** Test your Aura sites in a sandbox to ensure that they perform as expected. Contact Salesforce Customer Support if the Aura sites behave unexpectedly.

## Use Dynamic Redirect Rules in LWR Sites (Beta)

With dynamic rules, you can redirect users from your site to an LWR site URL—without any coding. Configure dynamic URL redirect rules that use a pattern to identify a URL from your site and redirect it to an LWR site. Use mapping rules for large numbers of similar URLs to redirect, such as URLs in a specific category.

**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:

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

## Get Notified When You Approach Your Portal Role Limit

Hitting your portal role limit can affect the availability of your site, but you can take steps to avoid this issue. Now Salesforce emails you when you reach 95% of your limit, so you have time to make adjustments before you run out of roles. When you reach your portal role limit, you can't create more users. To increase the number of roles, enable Account Role Optimization.

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

SEE ALSO:

[Salesforce Help: Experience Cloud User Licenses \(can be outdated or unavailable during release preview\)](#)

## Review Changes to Network Memberships in the Setup Audit Trail

It's now easier to track site membership activity. Activating or deactivating a site, updating welcome email preferences, or adding or removing a member group are now tracked in the Setup Audit Trail.

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

## Get Notified About Membership Processing Status

When a membership request finishes processing, Salesforce sends you an email notification and confirms whether processing was successful. Previously, you ran a query to determine if a membership request was processed successfully.

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

## Improve Authorization Flow Performance with JSON Web Token (JWT)-Based Access Tokens (Beta)

Up your authorization flow game by enabling your connected apps to issue JSON Web Token (JWT)-based access tokens. Unlike our opaque access tokens, you can locally introspect JWT-based access tokens without calling a Salesforce endpoint, making your authorization flows more efficient. Currently, JWT-based access tokens aren't supported for any Salesforce APIs.

**Where:** This change applies to [LWR](#), [Aura](#), and [Visualforce 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:

[Enhance Your Authorization Flow Efficiency with JSON Web Token \(JWT\)-Based Access Tokens \(Beta\)](#)

## Security and Sharing

For enhanced security, block your organization from sending emails from an unverified guest user email address. Take control of the self-registration process by disabling the standard components for self-registration on Aura and LWR sites. Get your Experience Cloud site ready for the move to Salesforce Edge Network.

IN THIS SECTION:

[Review Guest User Object, Record, and Field Access for Sites](#)

When you allow public access to your Experience Cloud sites, make sure that unauthenticated guest users are only able to access what you want them to access. Use the Guest User Sharing Rule Access Report page in Setup to quickly see what records are at risk of exposure, so you can quickly adjust access to important data.

[Restrict Emails Sent from Unverified Email Addresses by the Guest User \(Release Update\)](#)

To improve security standards, Salesforce is blocking any emails sent from an unverified email address in the guest user record. This update is enforced with the Summer '23 release. When this update is enforced, emails sent from the org using a guest user's unverified email address are blocked.

[Require Sender Name and Email Address to Send Chatter Email Notifications \(Release Update\)](#)

Salesforce enforces this update in Winter '24 to follow the latest security recommendations. Administrators must provide a Chatter email From Name and Email Address for Chatter email notifications to continue being sent.

[Get More Control over Self-Registration](#)

For better control over your self-registration process, you can now disable the standard Aura and Lightning Web Runtime (LWR) self-registration components.

[Prepare Your Experience Cloud Site for the Move to Salesforce Edge Network](#)

Salesforce Edge Network is enabled on a rolling basis between Summer '23 and Winter '24. If you're not already on Salesforce Edge Network, to prepare for this move, review the new routing settings on the My Domain Setup page. In certain cases, you can defer the enablement and disable Salesforce Edge Network from the My Domain Setup page.

[Get Content Security Policies for the Service Not Available and Too Many Request Pages](#)

To mitigate attacks that result from malicious content such as cross-site scripting (XSS) executing in trusted web page context, Salesforce uses a content security policy (CSP). And CSPs are now included on the Service Not Available (SNA) and Too Many Requests (TMR) pages.

## Review Guest User Object, Record, and Field Access for Sites

When you allow public access to your Experience Cloud sites, make sure that unauthenticated guest users are only able to access what you want them to access. Use the Guest User Sharing Rule Access Report page in Setup to quickly see what records are at risk of exposure, so you can quickly adjust access to important data.

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

**How:** Review results in the new Guest User Sharing Rule Access Report in Setup, and change record access levels as needed in your guest user sharing rules.

## Restrict Emails Sent from Unverified Email Addresses by the Guest User (Release Update)

To improve security standards, Salesforce is blocking any emails sent from an unverified email address in the guest user record. This update is enforced with the Summer '23 release. When this update is enforced, emails sent from the org using a guest user's unverified email address are blocked.

**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:** If you have any custom implementations with Apex or flows that use emails sent from guest user records, you may need to change the guest user record to continue sending emails.

To continue sending emails from the guest user record, follow these steps:

- Create an organization-wide email address and verify it.
- Add the organization-wide email address in the Email field of the guest user record.

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.

One example of an area that can be affected by this update is flows. When a flow has a Send Email action, the Sender Type and Sender Email Address must be populated with the verified org-wide email address. Another example is Email Alerts. Make sure the **From** address of email alerts is set to the verified org-wide email address when the default workflow user is the guest user.

SEE ALSO:

[Release Updates](#)

[Control Who Can Use Organization-Wide Email Addresses](#)

[Salesforce Help: Organization-Wide Email Addresses \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Flow Core Action: Send Email \(can be outdated or unavailable during release preview\)](#)

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

[Salesforce Help: Configure the Site Guest User Record \(can be outdated or unavailable during release preview\)](#)

## Require Sender Name and Email Address to Send Chatter Email Notifications (Release Update)

Salesforce enforces this update in Winter '24 to follow the latest security recommendations. Administrators must provide a Chatter email From Name and Email Address for Chatter email notifications to continue being sent.

**Where:** This change applies to orgs using Lightning Experience or Salesforce Classic.

**When:** Salesforce enforces this update in Winter '24.

**How:** When this update is enforced, Chatter emails are no longer sent from orgs where the From Name and Email Address fields in Chatter Email Settings are blank.

To review this update, from Setup, in the Quick Find box, enter *Release Updates*, and then select **Release Updates**. Follow the steps for Require Sender Name and Email Address to Send Chatter Email Notifications.

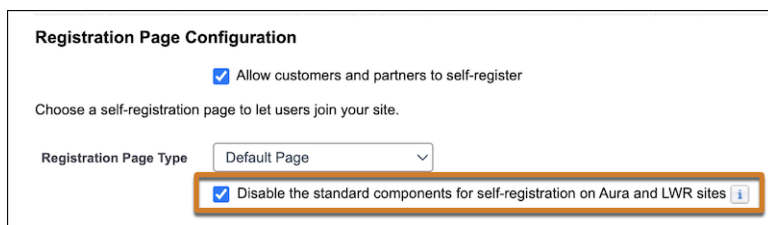
## Get More Control over Self-Registration

For better control over your self-registration process, you can now disable the standard Aura and Lightning Web Runtime (LWR) self-registration components.

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

**Why:** For new and existing sites, disable the standard self-registration components in these scenarios.

- You selected the Default, Visualforce, or Configurable Self-Reg page types.
- You selected the Experience Builder page type and you want full control over the user information that your self-registration Apex controller can collect.
- You selected the Experience Builder page type and you aren't using the standard Aura or LWR component that comes with your site.



The screenshot shows the 'Registration Page Configuration' settings. At the top, there is a checkbox labeled 'Allow customers and partners to self-register' which is checked. Below this, a text label says 'Choose a self-registration page to let users join your site.' Underneath, there is a 'Registration Page Type' dropdown menu currently set to 'Default Page'. At the bottom, there is a checkbox labeled 'Disable the standard components for self-registration on Aura and LWR sites' which is checked. This checkbox is highlighted with a red rectangular border.

## Prepare Your Experience Cloud Site for the Move to Salesforce Edge Network

Salesforce Edge Network is enabled on a rolling basis between Summer '23 and Winter '24. If you're not already on Salesforce Edge Network, to prepare for this move, review the new routing settings on the My Domain Setup page. In certain cases, you can defer the enablement and disable Salesforce Edge Network from the My Domain Setup page.

**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:

[Prepare for the Move to Salesforce Edge Network](#)

## Get Content Security Policies for the Service Not Available and Too Many Request Pages

To mitigate attacks that result from malicious content such as cross-site scripting (XSS) executing in trusted web page context, Salesforce uses a content security policy (CSP). And CSPs are now included on the Service Not Available (SNA) and Too Many Requests (TMR) pages.

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

## Other Changes

Learn about smaller changes that improve Experience Cloud.

IN THIS SECTION:

[Remove the Mobile Publisher App Update Component from Your Sites](#)

The AppExchange package that provides the Mobile Publisher App Update component will be delisted from AppExchange on October 1, 2023. You can now use the Minimum App Version settings in Experience Builder to urge or force users to upgrade their apps. To prevent your users from receiving duplicate prompts to update their app, remove the Mobile Publisher App update component.

## Remove the Mobile Publisher App Update Component from Your Sites

The AppExchange package that provides the Mobile Publisher App Update component will be delisted from AppExchange on October 1, 2023. You can now use the Minimum App Version settings in Experience Builder to urge or force users to upgrade their apps. To prevent your users from receiving duplicate prompts to update their app, remove the Mobile Publisher App update 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:** Remove the Mobile Publisher App Update component from your sites and uninstall the AppExchange package. To adjust the Minimum App Version settings in Experience Builder, from Settings, go to Mobile Publisher, and then App Settings.

SEE ALSO:

[Salesforce Help: Urge or Require Users to Update to the Latest Mobile Publisher App Version \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Uninstall a Managed Package \(can be outdated or unavailable during release preview\)](#)



## Field Service

---

Create schedules using robust features with the Enhanced Scheduling and Optimization Engine, available for new users by default. Or, easily switch to the new engine for all service territories for improved scalability, performance, and scheduling quality. Save time by letting mobile workers set follow-up appointments in the app. Expand how mobile users get work done, with custom dashboards and images that can be annotated and uploaded even when offline. Supercharge workflows with the reimagined tablet experience and updated related list UI. Enable customers to track service outcomes to easily assess the compliance of service contracts. Ensure timely maintenance by planning ahead for potential blockers. Route work to the best agent for the job. Enhance the customer experience by enabling customer-driven live sessions and messaging with Visual Remote Assistant.

### IN THIS SECTION:

#### [Field Service Resource Management](#)

Get more capabilities and improved scheduling with Enhanced Scheduling and Optimization, now available by default in new Salesforce orgs. Existing orgs can switch easily to use the enhanced engine for all service territories. Flag service appointments as offsite for remote jobs, and enable scrolling horizontally on the Gantt to view schedule details. And, grant access to contractors and seasonal workers by issuing Contractor and Contractor Plus login-based licenses.

#### [Field Service Asset Management](#)

Track service outcomes to evaluate the compliance of service contracts. Use lead time on usage-based preventive maintenance to account for anticipated related tasks. Distribute work items efficiently with Omni-Channel. Run a report to see the change history for a field. Price assets accurately with added decimal support. Add notes and files as related lists to your Product Service Campaign and Product Service Campaign Item records. Get maintenance recommendations for your assets based on WorkType. Make sure that your work orders are prepared for the migration to maintenance work rules.

#### [Field Service Customer Engagement](#)

Use Messaging for In-App and Web to communicate with Visual Remote Assistant customers and set up preferences for your sessions.

#### [Field Service Mobile](#)

Use Lightning web components to shape the mobile app so that it works best for your business. Get your mobile workers to use the Field Service mobile widget so that they can keep on track for appointments. Easily view list items with the related list redesign. Use deep links to give contractors instant access to login servers. And, set up location-based actions to view the service appointment record, open a Lightning web component, or initiate a mobile flow.

## Field Service Resource Management

Get more capabilities and improved scheduling with Enhanced Scheduling and Optimization, now available by default in new Salesforce orgs. Existing orgs can switch easily to use the enhanced engine for all service territories. Flag service appointments as offsite for remote jobs, and enable scrolling horizontally on the Gantt to view schedule details. And, grant access to contractors and seasonal workers by issuing Contractor and Contractor Plus login-based licenses.

### IN THIS SECTION:

#### [Enhanced Scheduling and Optimization](#)

Benefit from advanced features and better schedule quality with Enhanced Scheduling and Optimization. The enhanced engine is now available by default for new Salesforce orgs, and easily transitioned to by existing orgs, for all territories. Mark service appointments as offsite when mobile workers can do the job remotely.

#### [Show All the Availability Information on the Gantt](#)

Show dispatchers detailed information for available resource hours on the Gantt when in the 3 Days, Weekly, and 2 Weeks date resolutions by scrolling horizontally. Previously, only a limited amount of information could be displayed.

### [Expand Access to More Contractors with Login-Based SKUs](#)

Provide contractors and seasonal employees the access they need with Contractor and Contractor Plus login-based SKUs. With up to 20 users per login, each valid until midnight in most time zones, workers can get multiple jobs done using one login. The updated guidelines for setting operating hours ensure login-based users are scheduled only when they're available.

## Enhanced Scheduling and Optimization

Benefit from advanced features and better schedule quality with Enhanced Scheduling and Optimization. The enhanced engine is now available by default for new Salesforce orgs, and easily transitioned to by existing orgs, for all territories. Mark service appointments as offsite when mobile workers can do the job remotely.

### IN THIS SECTION:

#### [Create Optimal Schedules and Benefit from Innovative Capabilities with the Default Enhanced Scheduling and Optimization Engine](#)

As of Summer '23, new Salesforce orgs have Enhanced Scheduling and Optimization enabled by default for all service territories. Existing orgs can opt in and enable the enhanced engine for all or selected service territories. The enhanced engine is an improvement of the existing optimization functionality and associated manual and semiautomatic scheduling services. The new architecture and services are more efficient and improve scalability, performance, and schedule quality. Additionally, take advantage of new features such as Travel Modes, Service Appointment Sliding, Multiple Flexible Breaks, Scheduled Jobs enhancements, Holiday Management, Offsite Appointments, and Optimization Hub.

#### [Switch Easily to Enhanced Scheduling and Optimization for Existing Orgs](#)

As of Summer '23, new Salesforce orgs have Enhanced Scheduling and Optimization enabled by default for all service territories. Existing orgs can now smoothly transition to the enhanced engine and enable it for all service territories to get the benefits of the new engine. Additionally, use Enhanced Scheduling and Optimization when service appointments or service resources don't have an associated service territory.

#### [Get Additional Supported Features with Enhanced Scheduling and Optimization](#)

Efficiently schedule work for service crews based on team member allocations during different periods of time. For example, assign a service crew with a lead solar technician and an electrician to install a solar panel array for a residential customer. Create specific time slots or shifts dedicated to service appointments that meet your criteria. For example, reserve a time slot in the morning for installation appointments only, so that resources aren't filled up with repair or maintenance appointments. Allow customers to define their availability to receive services, respecting their preferences for business operating hours. For example, schedule work during a customer's available hours, avoiding customer no-shows. And, quickly schedule, dispatch, and track emergency work. For example, view your closest mobile workers so that you quickly dispatch work as needed.

#### [Improve Your Mobile Workers' Efficiency by Defining Offsite Service Appointments](#)

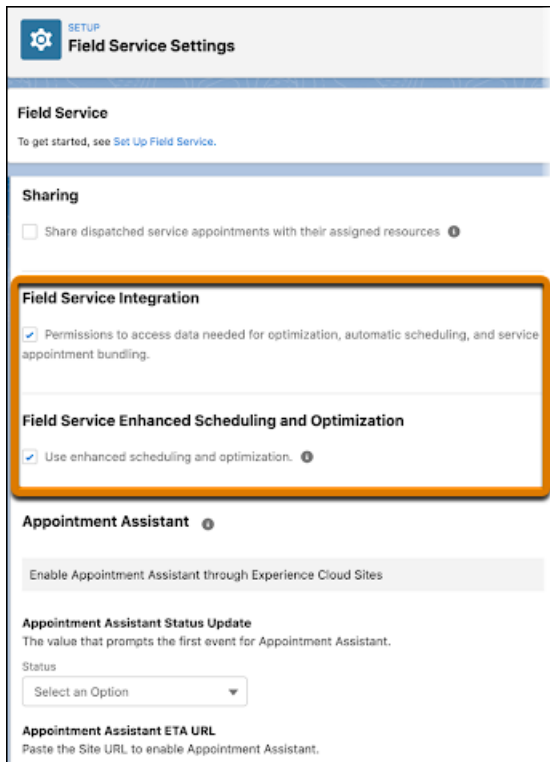
Optimize your mobile workers' schedules for increased productivity by marking service appointments as offsite when jobs can be done remotely, even if an address is specified. No travel time is added to the schedule. For example, remote technical assistance, filling out reports, or renewing health and safety certifications can be done from anywhere.

## Create Optimal Schedules and Benefit from Innovative Capabilities with the Default Enhanced Scheduling and Optimization Engine

As of Summer '23, new Salesforce orgs have Enhanced Scheduling and Optimization enabled by default for all service territories. Existing orgs can opt in and enable the enhanced engine for all or selected service territories. The enhanced engine is an improvement of the existing optimization functionality and associated manual and semiautomatic scheduling services. The new architecture and services are more efficient and improve scalability, performance, and schedule quality. Additionally, take advantage of new features such as Travel Modes, Service Appointment Sliding, Multiple Flexible Breaks, Scheduled Jobs enhancements, Holiday Management, Offsite Appointments, and Optimization Hub.

**Where:** This change applies to Lightning Experience and Salesforce Classic in Enterprise, Unlimited, and Developer editions with the Field Service managed package installed.

**How:** In Setup, go to Field Service Settings and verify that **Field Service Enhanced Scheduling and Optimization** is enabled.



SEE ALSO:

[Salesforce Help: Get Ready for Scheduling and Optimization](#) (can be outdated or unavailable during release preview)

[Salesforce Video: Enhanced Scheduling and Optimization](#) (can be outdated or unavailable during release preview)

## Switch Easily to Enhanced Scheduling and Optimization for Existing Orgs

As of Summer '23, new Salesforce orgs have Enhanced Scheduling and Optimization enabled by default for all service territories. Existing orgs can now smoothly transition to the enhanced engine and enable it for all service territories to get the benefits of the new engine. Additionally, use Enhanced Scheduling and Optimization when service appointments or service resources don't have an associated service territory.

**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:** To enable Enhanced Scheduling and Optimization, go to Field Service Settings in Setup and select **Field Service Enhanced Scheduling and Optimization**. In the Field Service Admin app, select **Field Service Settings**, and then select **Scheduling > General Logic**. Turn on **Use enhanced scheduling and optimization for all service territories** and **Use enhanced scheduling and optimization when there isn't an associated service territory**.

Field Service Settings Service Territories Operating Hours Work Types Service Resources More

## Scheduling

GENERAL LOGIC SCHEDULING POLICIES DYNAMIC GANTT ROUTING BUNDLING

Multiday service appointment field [?](#) Is MultiDay

Set the hour that starts a new day based on the Availability rule(s) [?](#) ☐

Maximum days to get candidates or to book an appointment [?](#) 10

Delay auto-scheduling until appointments are geocoded [?](#) ☒

Activate Approval confirmation on resource absences ☐

Enable resource crew skill grouping ☐

Avoid aerial calculation upon callout DML exception ☒

Respect secondary STM operating hours ☒

Enable service appointment sliding [Learn More in Help](#) [?](#) ☒

Use enhanced scheduling and optimization for all service territories [Learn More in Help](#) ☒

Use enhanced scheduling and optimization when there isn't an associated service territory [Learn More in Help](#) [?](#) ☒

Select which statuses are considered as pinned, or unmovable, for scheduling

## SEE ALSO:

[Salesforce Help: Get Ready for Scheduling and Optimization](#) (can be outdated or unavailable during release preview)

[Salesforce Help: Set Up Enhanced Optimization for Field Service Territories](#) (can be outdated or unavailable during release preview)

[Salesforce Video: Enhanced Scheduling and Optimization](#) (can be outdated or unavailable during release preview)

## Get Additional Supported Features with Enhanced Scheduling and Optimization

Efficiently schedule work for service crews based on team member allocations during different periods of time. For example, assign a service crew with a lead solar technician and an electrician to install a solar panel array for a residential customer. Create specific time slots or shifts dedicated to service appointments that meet your criteria. For example, reserve a time slot in the morning for installation appointments only, so that resources aren't filled up with repair or maintenance appointments. Allow customers to define their availability to receive services, respecting their preferences for business operating hours. For example, schedule work during a customer's available hours, avoiding customer no-shows. And, quickly schedule, dispatch, and track emergency work. For example, view your closest mobile workers so that you quickly dispatch work as needed.

**Where:** This change applies to Lightning Experience and Salesforce Classic in Enterprise, Unlimited, and Developer editions with the Field Service managed package installed.

**How:** In Setup, go to Field Service Settings and verify that **Field Service Enhanced Scheduling and Optimization** is enabled.

SEE ALSO:

[Salesforce Help: Get Ready for Scheduling and Optimization \(can be outdated or unavailable during release preview\)](#)

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

[Salesforce Help: Reserve Time Slots for Designated Types of Work \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Work Rule Type: Service Appointment Visiting Hours \(can be outdated or unavailable during release preview\)](#)

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

[Salesforce Video: Enhanced Scheduling and Optimization \(can be outdated or unavailable during release preview\)](#)

## Improve Your Mobile Workers' Efficiency by Defining Offsite Service Appointments

Optimize your mobile workers' schedules for increased productivity by marking service appointments as offsite when jobs can be done remotely, even if an address is specified. No travel time is added to the schedule. For example, remote technical assistance, filling out reports, or renewing health and safety certifications can be done from anywhere.

**Where:** This feature is available in Lightning Experience and Salesforce Classic in Enterprise, Unlimited, and Developer editions with the Field Service managed package installed.

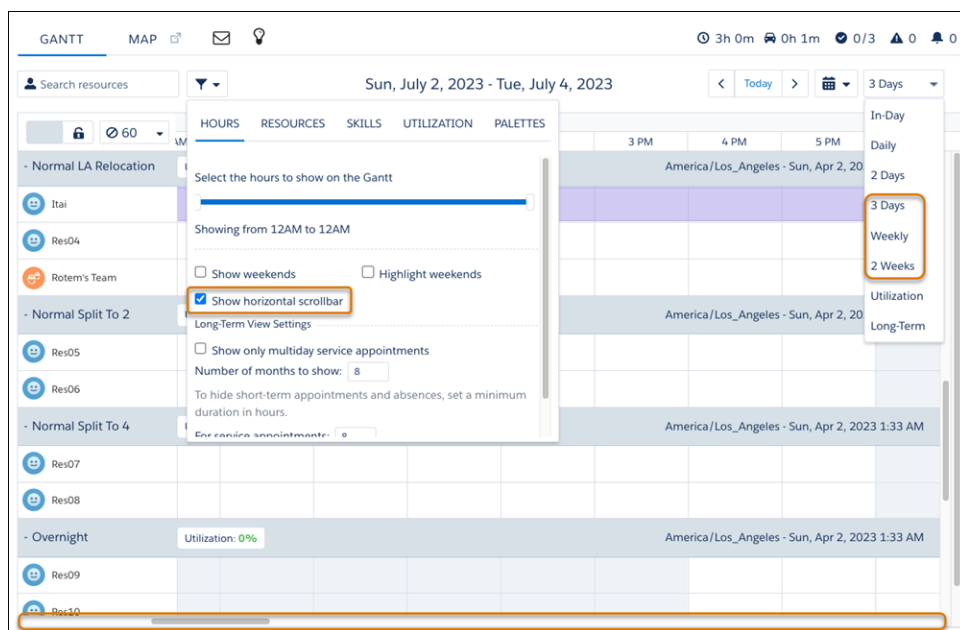
**How:** In Setup, go to Field Service Settings and make sure that **Field Service Enhanced Scheduling and Optimization** is enabled. Select **Offsite Appointment** on the service appointment record. Existing orgs must add the **Offsite Appointment** field to the Service Appointment page layout. New orgs have this field available by default.

## Show All the Availability Information on the Gantt

Show dispatchers detailed information for available resource hours on the Gantt when in the 3 Days, Weekly, and 2 Weeks date resolutions by scrolling horizontally. Previously, only a limited amount of information could be displayed.

**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:** Click the filter icon on the Gantt, and then select **Show horizontal scrollbar** on the Hours tab to display the scrollbar.



SEE ALSO:

[Salesforce Help: Filter the Gantt in Field Service \(can be outdated or unavailable during release preview\)](#)

## Expand Access to More Contractors with Login-Based SKUs

Provide contractors and seasonal employees the access they need with Contractor and Contractor Plus login-based SKUs. With up to 20 users per login, each valid until midnight in most time zones, workers can get multiple jobs done using one login. The updated guidelines for setting operating hours ensure login-based users are scheduled only when they're available.

**Where:** This feature is available in Lightning Experience and Salesforce Classic in Enterprise, Unlimited, and Developer editions with the Field Service managed package installed.

**How:** The Contractor Login-Based license assigns the Customer Community Plus license, and the Contractor Plus Login-Based license assigns the Partner Community license.

SEE ALSO:

[Salesforce Help: Field Service Permission Set Licenses \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Guidelines for Setting Up Field Service Contractors \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Guidelines for Creating Operating Hours for Field Service \(can be outdated or unavailable during release preview\)](#)

## Field Service Asset Management

Track service outcomes to evaluate the compliance of service contracts. Use lead time on usage-based preventive maintenance to account for anticipated related tasks. Distribute work items efficiently with Omni-Channel. Run a report to see the change history for a field. Price assets accurately with added decimal support. Add notes and files as related lists to your Product Service Campaign and Product Service Campaign Item records. Get maintenance recommendations for your assets based on WorkType. Make sure that your work orders are prepared for the migration to maintenance work rules.

## IN THIS SECTION:

[Ensure High Quality of Service with Outcome-Based Contracts](#)

Give customers an easy way to assess the compliance of a service contract by letting them track and measure service outcomes. For example, track the temperature of an asset to provide on-time maintenance so that a customer never experiences downtime.

[Build In Lead Time on Usage-Based Work Orders](#)

Factor lead time into anticipated usage-based preventive maintenance to complete work orders more efficiently. With lead time, you can accommodate prerequisite tasks, such as notifying customers early, gaining site access, or coordinating the necessary resources.

[Route Important Work Items Quickly with Omni-Channel](#)

Use Omni-Channel to route work orders to the most available and qualified support agents based on employee skills, availability, and workload. Supervisors can also use Omni Supervisor for real-time, operational intelligence. With the support for work orders, you can now turbocharge agent productivity by pushing field service work alongside cases, chats, leads, and other work items.

[View the Change History for a Field](#)

See who made a change to a field and when the change was made to resolve any subsequent questions quickly. You can run this report for these objects: Asset, Return Order, Return Order Line Items, Service Appointment, Service Contract, Service Resources, Service Territory, Service Territory Member, Work Order, and Work Order Line Item.

[Price Your Assets with More Precision](#)

Add up to two digits to the price of an asset after the decimal point. Previously, you could define only whole numbers for the asset's price.

[Improve Asset Care with Asset Attributes](#)

Continue the shift to proactive and ultimately predictive maintenance. Create criteria-based maintenance rules by using asset attributes that represent asset health and performance. For example, define maintenance conditions based on an asset attribute value such as engine temperature and engine RPM. You can then create maintenance work for the engine by monitoring these conditions.

[Find Notes and Files Easily for Product Service Campaigns](#)

Add notes and files as related lists to your Product Service Campaign and Product Service Campaign Item records. These related lists are available by default on the record layout. Previously, you could access files only from the App Launcher, and you couldn't access notes at all.

[Build Service Recommendations for Your Assets](#)

Keep assets running at optimal health by suggesting maintenance based on WorkType in Einstein Recommendation Builder.

[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.

## Ensure High Quality of Service with Outcome-Based Contracts

Give customers an easy way to assess the compliance of a service contract by letting them track and measure service outcomes. For example, track the temperature of an asset to provide on-time maintenance so that a customer never experiences downtime.

**Where:** This feature is available in Lightning Experience and Salesforce Classic in Enterprise, Unlimited, and Developer editions.

## SEE ALSO:

[Salesforce Help: Manage Outcome-Based Contract \(can be outdated or unavailable during release preview\)](#)

## Build In Lead Time on Usage-Based Work Orders

Factor lead time into anticipated usage-based preventive maintenance to complete work orders more efficiently. With lead time, you can accommodate prerequisite tasks, such as notifying customers early, gaining site access, or coordinating the necessary resources.

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

**How:** Create a maintenance plan and add the covered assets. On Recordset Filter Criteria, select **Add lead time to usage-based work rules**.

SEE ALSO:

[Salesforce Help: Create Usage-Based Maintenance \(can be outdated or unavailable during release preview\)](#)

## Route Important Work Items Quickly with Omni-Channel

Use Omni-Channel to route work orders to the most available and qualified support agents based on employee skills, availability, and workload. Supervisors can also use Omni Supervisor for real-time, operational intelligence. With the support for work orders, you can now turbocharge agent productivity by pushing field service work alongside cases, chats, leads, and other work items.

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

**How:** From Setup, in the Quick Find box, enter Service Channels. Select the Salesforce object **Work Orders** for a new or existing service channel.

SEE ALSO:

[Salesforce Help: Route Work with Omni-Channel \(can be outdated or unavailable during release preview\)](#)

## View the Change History for a Field

See who made a change to a field and when the change was made to resolve any subsequent questions quickly. You can run this report for these objects: Asset, Return Order, Return Order Line Items, Service Appointment, Service Contract, Service Resources, Service Territory, Service Territory Member, Work Order, and Work Order Line Item.



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

**How:** Create a new report, and select **Field History Reporting**.

SEE ALSO:

[Salesforce Help: Report on Field Service \(can be outdated or unavailable during release preview\)](#)

## Price Your Assets with More Precision

Add up to two digits to the price of an asset after the decimal point. Previously, you could define only whole numbers for the asset's price.

**Where:** This change applies to Lightning Experience, Salesforce Classic, and all versions of the mobile app in Enterprise, Unlimited, and Developer editions.

**How:** From Assets in the Object Manager, add the Price field to the Asset page layout.

## Improve Asset Care with Asset Attributes

Continue the shift to proactive and ultimately predictive maintenance. Create criteria-based maintenance rules by using asset attributes that represent asset health and performance. For example, define maintenance conditions based on an asset attribute value such as engine temperature and engine RPM. You can then create maintenance work for the engine by monitoring these conditions.

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

SEE ALSO:

[Salesforce Help: Create Criteria-Based Maintenance \(can be outdated or unavailable during release preview\)](#)

## Find Notes and Files Easily for Product Service Campaigns

Add notes and files as related lists to your Product Service Campaign and Product Service Campaign Item records. These related lists are available by default on the record layout. Previously, you could access files only from the App Launcher, and you couldn't access notes at all.

**Where:** This change applies to Lightning Experience, Salesforce Classic, and all versions of the mobile app in Enterprise, Unlimited, and Developer editions.

## Build Service Recommendations for Your Assets

Keep assets running at optimal health by suggesting maintenance based on WorkType in Einstein Recommendation Builder.

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

SEE ALSO:

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

[Salesforce Help: Set Up Work Order Management for Field Service \(can be outdated or unavailable during release preview\)](#)

## Migrate from Maintenance Plan Frequency Fields to Maintenance Work Rules (Release Update)

The Frequency and Frequency Type fields on 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**. To hide the frequency fields after the migration, go to Setup, turn off Field Service, and then turn it on again.

### SEE ALSO:

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

[Salesforce Knowledge Article: Migration Retirement Migration Retirement Tips and Tricks \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Get Excited about Using Maintenance Work Rules \(can be outdated or unavailable during release preview\)](#)

[Salesforce Video: Spotlight on Implementing Preventative Maintenance \(can be outdated or unavailable during release preview\)](#)

## Field Service Customer Engagement

Use Messaging for In-App and Web to communicate with Visual Remote Assistant customers and set up preferences for your sessions.

### IN THIS SECTION:

[Visual Remote Assistant](#)

Connect with customers by using Messaging for In-App and Web. And, tailor your Visual Remote Assistant session preferences to suit your business needs.

## Visual Remote Assistant

Connect with customers by using Messaging for In-App and Web. And, tailor your Visual Remote Assistant session preferences to suit your business needs.

### IN THIS SECTION:

[Engage More with Customers by Using Messaging for In-App and Web](#)

Improve customer service by allowing customers to connect to a live session with a support agent via chats. Customers can request a Visual Remote Assistant call using messaging and save time by providing contact information and other details before the remote session.

### [Customize the Visual Remote Assistant Session's Invite Flow Preferences](#)

Start a Visual Remote Assistant session using a business flow with customization options to meet your business needs. For example, start a session with audio enabled and with a virtual background effect showing your company logo. Or start a two-way video session without a video and enable the video during the sessions. To customize, use a screen element that allows selecting a checkbox to enable audio, another checkbox to start without a video, and a dropdown menu to select different options for virtual background. Previously no customizations were available.

## Engage More with Customers by Using Messaging for In-App and Web

Improve customer service by allowing customers to connect to a live session with a support agent via chats. Customers can request a Visual Remote Assistant call using messaging and save time by providing contact information and other details before the remote session.

**Where:** This feature is available in Lightning Experience in Enterprise, Unlimited, and Developer editions.

SEE ALSO:

[Salesforce Help: Implement Visual Remote Assistant for Field Service \(can be outdated or unavailable during release preview\)](#)

### Customize the Visual Remote Assistant Session's Invite Flow Preferences

Start a Visual Remote Assistant session using a business flow with customization options to meet your business needs. For example, start a session with audio enabled and with a virtual background effect showing your company logo. Or start a two-way video session without a video and enable the video during the sessions. To customize, use a screen element that allows selecting a checkbox to enable audio, another checkbox to start without a video, and a dropdown menu to select different options for virtual background. Previously no customizations were available.

**Where:** This feature is available in Lightning Experience in Enterprise, Unlimited, and Developer editions.

SEE ALSO:

[Salesforce Help: Implement Visual Remote Assistant for Field Service \(can be outdated or unavailable during release preview\)](#)

## Field Service Mobile

Use Lightning web components to shape the mobile app so that it works best for your business. Get your mobile workers to use the Field Service mobile widget so that they can keep on track for appointments. Easily view list items with the related list redesign. Use deep links to give contractors instant access to login servers. And, set up location-based actions to view the service appointment record, open a Lightning web component, or initiate a mobile flow.

IN THIS SECTION:

### [Lightning Web Components](#)

Save time by letting mobile workers set follow-up appointments right in the app. Create a dashboard to help mobile workers keep track of data. And, mobile workers can now upload images offline and convey details by adding text and descriptions.

### [Stay on Track with the Field Service Widget \(Beta\)](#)

Show mobile workers their next appointment in a widget on their home screen. Workers can see the appointment details and check when they must head out to the appointment to make sure that they're on time. And, workers can update the appointment status and navigate to the location.

### [Get Information at a Glance with Redesigned Related Lists](#)

The related lists features that mobile workers rely on are still in place, but with labeled and stacked rows in an easy-to-read format for an optimal user experience. Previously, related lists didn't include labels, making it more difficult for users to understand list items.

### [Guide Your Mobile Workers at the Right Place and the Right Time \(Pilot\)](#)

Give your mobile workers the personalized information that they need, when they need it. Set up actions that let mobile workers view the service appointment record, open a Lightning web component (LWC), or initiate a mobile flow. For example, when the worker arrives to fix a leaking pipe, show them an action that opens the service appointment in the Field Service app so that they can see the details. Or, show an action that opens an LWC to let the worker upload an image of the leak for the site survey. Then, when the worker is leaving the appointment, show an action that takes the worker through a mobile flow for the completion checklist to make sure that nothing is overlooked.

### [Access Login Servers with One Click](#)

Get contractors connected faster with login-server deep links, which save time by eliminating mistakes and repeated log in attempts. Users click the deep link, enter their login credentials, and the server is saved to the Change Server list.

### [Customize the Calendar View for iPhone](#)

The Field Service mobile app now uses the iOS standard calendar view, eliminating the need for custom code. The design uses standard the Salesforce standard list selector for the component library, and mobile workers can access the list-picker from the navigation bar. Customize decorations on the calendar to let mobile workers know about special information they need for different dates, such as holidays or work events.

### [Launch Lightning Web Components from Work Steps](#)

Help mobile workers fulfill work plans more easily and effectively by adding Lightning web components (LWCs) as quick actions to work steps. Mobile workers can do things such as add images or send files straight from a work step.

## Lightning Web Components

Save time by letting mobile workers set follow-up appointments right in the app. Create a dashboard to help mobile workers keep track of data. And, mobile workers can now upload images offline and convey details by adding text and descriptions.

### IN THIS SECTION:

#### [Manage Follow-Up Appointments from the Field](#)

Set up the Follow-Up Appointment Lightning web component (LWC) to let your mobile workers create and schedule follow-up appointments for customers directly from the mobile app, without contacting customer services.

#### [Show Important Information on a Dashboard](#)

Set up the Mobile Dashboard Lightning web component (LWC) to let your mobile workers easily see an overview of their data. For example, show a dashboard that lets workers know where they stand with the company's KPIs. That way, they always know what they need to work on.

#### [Avoid Delays with Offline Image Uploading](#)

Configure the Upload and Annotate Images Lightning web component (LWC) to let mobile workers add images to their work orders or service appointments even when offline. And, mobile workers can now add text, change the file name, and add a description. Previously, they could only crop or draw on an image.

## Manage Follow-Up Appointments from the Field

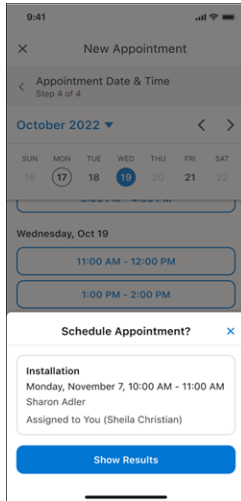
Set up the Follow-Up Appointment Lightning web component (LWC) to let your mobile workers create and schedule follow-up appointments for customers directly from the mobile app, without contacting customer services.

**Where:** This feature is available in the Field Service mobile app for Android and iOS.

**When:** The Follow-Up Appointment LWC is available later in the Summer '23 release.

 **Note:** Follow-Up Appointment LWC is an open-source component and isn't supported by Salesforce Customer Support.

**How:** Install the Follow-Up Appointment package. From the App Launcher, find and select **Follow-Up Appointment Settings**, and configure the LWC. Then, connect the LWC to a quick action.



SEE ALSO:


[Salesforce Help: Customize and Extend the Field Service Mobile App with Lightning Web Components \(can be outdated or unavailable during release preview\)](#)

[GitHub: LWC-Mobile-Samples \(can be outdated or unavailable during release preview\)](#)

## Show Important Information on a Dashboard

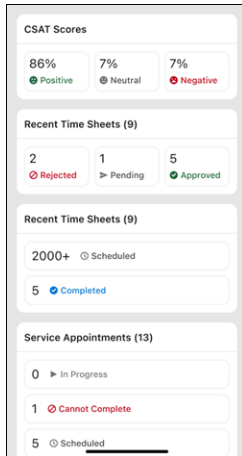
Set up the Mobile Dashboard Lightning web component (LWC) to let your mobile workers easily see an overview of their data. For example, show a dashboard that lets workers know where they stand with the company's KPIs. That way, they always know what they need to work on.

**Where:** This feature is available in the Field Service mobile app for Android and iOS.

 **Note:** Mobile Dashboard LWC is an open-source component and isn't supported by Salesforce Customer Support.

**When:** The Mobile Dashboard LWC is available later in the Summer '23 release.

**How:** Install the Mobile Dashboard package. From the App Launcher, find and select **Mobile Dashboard Settings**, and configure the LWC. Then, connect the LWC to a quick action.

**SEE ALSO:**

[Salesforce Help: Customize and Extend the Field Service Mobile App with Lightning Web Components](#) (can be outdated or unavailable during release preview)

[GitHub: LWC-Mobile-Samples](#) (can be outdated or unavailable during release preview)

## Avoid Delays with Offline Image Uploading

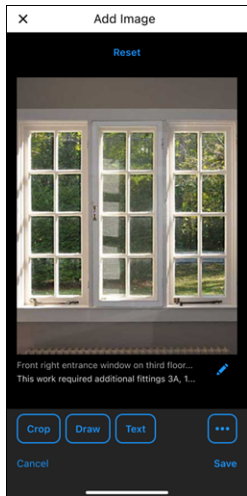
Configure the Upload and Annotate Images Lightning web component (LWC) to let mobile workers add images to their work orders or service appointments even when offline. And, mobile workers can now add text, change the file name, and add a description. Previously, they could only crop or draw on an image.

**Where:** This change applies to the Field Service mobile app for Android and iOS.



**Note:** Upload and Annotate Images LWC is an open-source component and isn't supported by Salesforce Customer Support.

**How:** Customize the provided code as needed and deploy the Upload and Annotate Images LWC to your org. Then, create a quick action using the LWC.

**SEE ALSO:**

[Salesforce Help: Customize and Extend the Field Service Mobile App with Lightning Web Components](#) (can be outdated or unavailable during release preview)

[GitHub: LWC-Mobile-Samples](#) (can be outdated or unavailable during release preview)

## Stay on Track with the Field Service Widget (Beta)

Show mobile workers their next appointment in a widget on their home screen. Workers can see the appointment details and check when they must head out to the appointment to make sure that they're on time. And, workers can update the appointment status and navigate to the location.

**Where:** This feature is available in the Field Service mobile app for iOS.



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

**When:** The Field Service widget is available later in the Summer '23 release.

**How:** Encourage your mobile workers to add the Field Service widget to their iPhone home screen.



SEE ALSO:

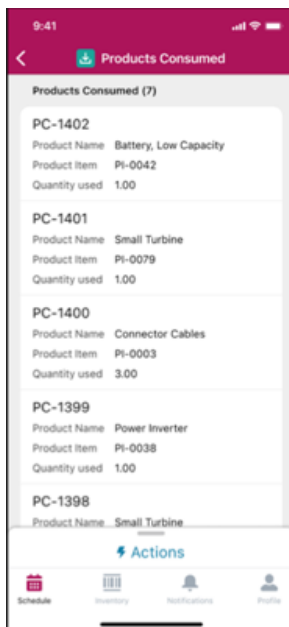
[Salesforce Help: Get the Field Service Mobile App \(can be outdated or unavailable during release preview\)](#)

## Get Information at a Glance with Redesigned Related Lists

The related lists features that mobile workers rely on are still in place, but with labeled and stacked rows in an easy-to-read format for an optimal user experience. Previously, related lists didn't include labels, making it more difficult for users to understand list items.

**Where:** This change applies to the Field Service mobile app for Android and iOS.

**How:** The fields and labels mobile workers see are based on the layout you choose, as in the example. Specialized related lists, such as work order line items, service reports, knowledge articles, and files, retain their usual format instead of the redesigned UI.






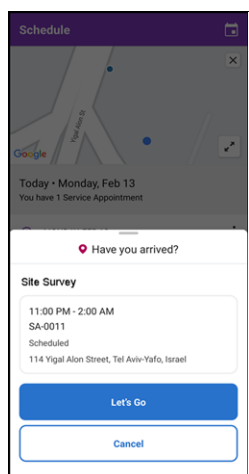
## Guide Your Mobile Workers at the Right Place and the Right Time (Pilot)

Give your mobile workers the personalized information that they need, when they need it. Set up actions that let mobile workers view the service appointment record, open a Lightning web component (LWC), or initiate a mobile flow. For example, when the worker arrives to fix a leaking pipe, show them an action that opens the service appointment in the Field Service app so that they can see the details. Or, show an action that opens an LWC to let the worker upload an image of the leak for the site survey. Then, when the worker is leaving the appointment, show an action that takes the worker through a mobile flow for the completion checklist to make sure that nothing is overlooked.

**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 \(Pilot\) \(can be outdated or unavailable during release preview\)](#)

## Access Login Servers with One Click

Get contractors connected faster with login-server deep links, which save time by eliminating mistakes and repeated log in attempts. Users click the deep link, enter their login credentials, and the server is saved to the Change Server list.

**Where:** This change applies to the Field Service mobile app for Android and iOS.

SEE ALSO:

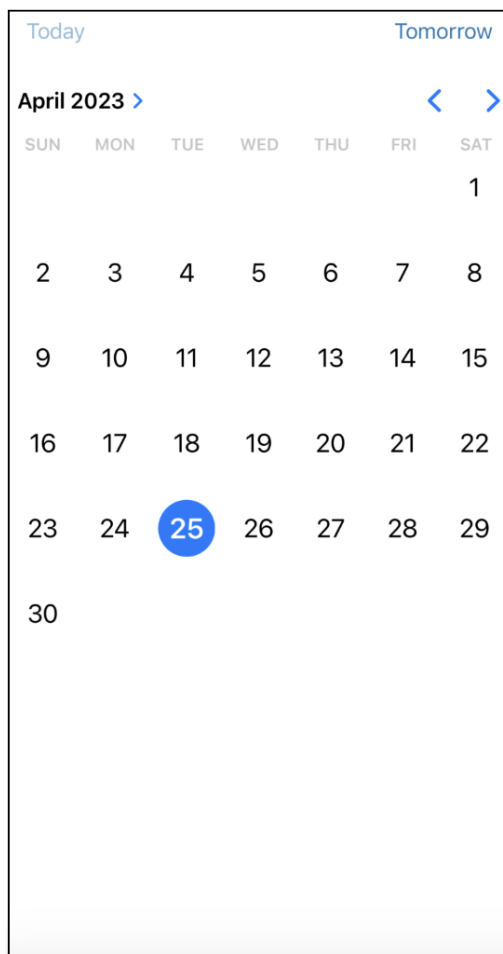
[Salesforce Help: Deep Linking Schema for the Field Service Mobile App \(can be outdated or unavailable during release preview\)](#)

## Customize the Calendar View for iPhone

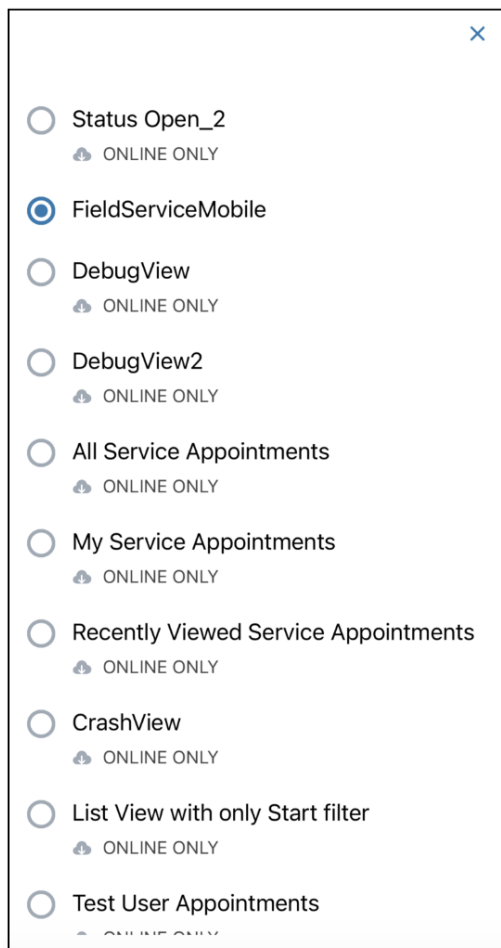
The Field Service mobile app now uses the iOS standard calendar view, eliminating the need for custom code. The design uses standard the Salesforce standard list selector for the component library, and mobile workers can access the list-picker from the navigation bar. Customize decorations on the calendar to let mobile workers know about special information they need for different dates, such as holidays or work events.

**Where:** This change applies to the Field Service mobile app for iPhone iOS in Developer, Enterprise, and Unlimited editions.

**Why:** Get a streamlined calendar view for iOS.



Open the list picker from the navigation bar and get a standard view of the related list.



## Launch Lightning Web Components from Work Steps

Help mobile workers fulfill work plans more easily and effectively by adding Lightning web components (LWCs) as quick actions to work steps. Mobile workers can do things such as add images or send files straight from a work step.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions with the Field Service Managed Package installed.

**How:** After you create the LWC, set the LWC on the Action Definition field for the work step. Mobile workers launch the LWC as a quick action from the work step by tapping the action from the action launcher. The status of the work step doesn't automatically change unless the LWC is built to update the status for the work step.

## Hyperforce

---

Hyperforce is the next-generation Salesforce infrastructure architecture, built for the public cloud. It enhances Salesforce applications' compliance, security, privacy, agility and scalability, and gives customers more choice over data residency.

## IN THIS SECTION:

[Tackle Data Privacy Concerns with Hyperforce European Union \(EU\) Operating Zone](#)

The Hyperforce European Union (EU) Operating Zone builds on the benefits of Hyperforce by combining our industry-leading products with best-in-class, 24/7 EU-based customer and engineering support.

[Migrate to Hyperforce with Hyperforce Assistant](#)

You can now upgrade to Hyperforce with help from Hyperforce Assistant. The updated assistant has the latest approved Hyperforce messaging. And the hard-coded references check in the Prepare phase now supports Salesforce Orgs with a large number of Apex classes.

## Tackle Data Privacy Concerns with Hyperforce European Union (EU) Operating Zone

The Hyperforce European Union (EU) Operating Zone builds on the benefits of Hyperforce by combining our industry-leading products with best-in-class, 24/7 EU-based customer and engineering support.

**Why:** Within the EU Operating Zone, leaders and organizations everywhere can:

- **Receive 24/7 EU-based support.** Get round-the-clock customer and technical support by EU-based personnel.
- **Keep customer data in the EU.** Gain enhanced customer choice and control over data residency.
- **Expand your business to the EU.** Contribute to data governance and digital transformation goals as your company scales.
- **Stay ahead of regulatory requirements.** Adapt to privacy and security regulations as they evolve.

## Migrate to Hyperforce with Hyperforce Assistant

You can now upgrade to Hyperforce with help from Hyperforce Assistant. The updated assistant has the latest approved Hyperforce messaging. And the hard-coded references check in the Prepare phase now supports Salesforce Orgs with a large number of Apex classes.

**Where:** Hyperforce Assistant is available in Lightning Experience and Salesforce Classic in all editions.

**How:** From Setup, in the Quick Find Box, enter *Hyperforce Assistant* and then select **Hyperforce Assistant**.

## Industries

---

Industries solutions shape Salesforce to the needs of your business, reducing the need for you to customize things yourself. Schedule test drives and service appointments with Automotive Cloud. Calculate order prices online and plan store visits with Consumer Goods Cloud. Actionable Segmentation is now generally available in Financial Services Cloud. Schedule home healthcare visits with Health Cloud. Manage lifecycles of awarded grants with Grantmaking for Public Sector Solutions and Nonprofit Cloud. Use CSV files to upload data to Net Zero Cloud. Automate selection of members for tier change and tier upgrade assessments with Loyalty Cloud. Orchestrate end-to-end warranty lifecycles with Manufacturing Cloud. Build ship and debit programs with Rebate Management. We also have plenty of changes for Education Cloud, Nonprofit Cloud, Media Cloud, Industries common features, and many more.

## IN THIS SECTION:

[Automotive Cloud](#)

Use Salesforce Scheduler in Automotive Cloud to schedule test drive appointments and vehicle service appointments easily. Improve inventory visibility using enhanced search and filter capabilities. Find vehicles across locations by criteria such as model, color, transmission, type, and dealer name. Streamline the end-to-end warranty lifecycle from establishing service standards to processing and settling claims submitted by dealers.

[Consumer Goods Cloud](#)

Empower your service reps to provide world-class customer service with the new Consumer Goods Cloud—Service app. Efficiently calculate order prices online with Penny Perfect Pricing and plan store visits using the mobile app. Embed interactive dashboards and leverage CRM analytics to monitor the effectiveness of your trade promotions. Additionally, with Copy promotion, you can let your users reuse all successful promotions.

[Financial Services Cloud](#)

Actionable Segmentation is now generally available and has new features that help design timely and personalized client outreach programs. You can get helpful predictions about customers to prioritize using Scoring Framework. Enable your Customer Community users to quickly update their addresses or request a fee reversal on Financial Services Client Portal. Do more with the enhancements to Service Process Studio and Discovery Framework. Use the new guided setup for Revenue Management to speed up the CRM analytics app creation for Revenue Management.

[Grantmaking](#)

Discover Grantmaking! Available in Public Sector Solutions or as a standalone product that includes Nonprofit Cloud, manage the whole lifecycle of the grants you award. Add details about the funding opportunities people or organizations can apply for. Provide an easy way to enter details of a budget down to the values for each category and period. Capture all the information related to a grant application. Track the applicant's requirements after a grant is awarded. Provide a Grantmaking Experience Cloud site for your applicants, grantees, and external reviewers to enter details directly in your grant records.

[Health Cloud](#)

Schedule home healthcare visits with Home Health. Use the new Bed Search component in Crisis Support Center Management to search for beds across healthcare facilities. Utilization Management's new guided workflows help providers to submit authorization requests and follow up on them. Advanced Therapy Management has a new Therapy Orchestration solution. Enhancements in Integrated Care Management introduce support for Social Determinants of Health. New OmniScripts simplify provider enrollment in Provider Network Management. We also have enhancements in CRM Analytics, Health Cloud Contact Center, Assessments, and much more.

[Insurance](#)

Insurance connects frontline agents, back-office teams, and customers with flexible components that support policy administration, benefit administration, claims, and billing.

[Loyalty Management](#)

Easily scan your loyalty program's promotions and events on the Promotion Calendar. Automate the selection of members for tier upgrade assessment and tier change for eligible members. Consolidate members' fixed non-qualifying points in real time. Automate the processes to filter ineligible transactions, redeem vouchers, and allow members to opt out of promotions. Provide partners permissions to add their program data from an Experience Cloud site.

[Manufacturing Cloud](#)

Maximize customer and asset lifetime value, drive servitization, and nurture deep relationships with your partners. Cultivate deeper customer loyalty by building a nuanced, scalable warranty management process by using Warranty Lifecycle Management. Gain a comprehensive understanding of every aspect of an asset's lifecycle by using Asset Service Console for Manufacturing. Service technicians in the field can promptly generate estimates for products and services by using the Pre-Work Estimation app. Get deeper insights on your sales and team performance with the new CRM Analytics-powered dashboards in the Analytics for Manufacturing app.

### Net Zero Cloud

Use CSV files to upload data to Net Zero Cloud. Allocate a portion of emissions from your subsidiaries and partner users by extending carbon accounting in your Net Zero Cloud org. Use electricity as a fuel type to calculate emissions from electric vehicles. Consolidate social and governance data for extended organizational boundaries, such as subsidiaries of the parent company or external partners within your Net Zero Cloud org.

### Public Sector Solutions

Use dynamic assessments with more objects, manage benefits with schedules and sessions, create referral intake flows with out-of-the-box components, and more.

### Rebate Management

Build flexible and scalable ship and debit programs using Ship and Debit Process Management. A ship and debit process helps you promptly react to market conditions and protect your partner's margins.

### Communications Cloud

Salesforce Industries Communications cloud extends the digital omni-channel capabilities of Salesforce. The Communications cloud includes Configure, Price, Quote (Industries CPQ), Enterprise Product Catalog (EPC), order capture, Digital Commerce, Industries Order Management, and Contract Lifecycle Management cloud solutions. The Communications cloud also includes cloud-specific application suites.

### Energy and Utilities Cloud

Energy & Utilities Cloud (E&U Cloud) combines and extends the full power of Salesforce Sales and Service Cloud and the Salesforce Platform into an industry-specific solution for utilities, retail energy, and modern energy services companies.

### Industries Order Management

Industries Order Management (also called Order Management, IOM or just OM) is a product module that delivers best-in-class, next-generation order management capabilities to communications, media and energy companies.

### Media Cloud

Salesforce Industries enables you to attract, engage, and support customers from anywhere, maximize lifetime value, and improve operational efficiency across the media value chain.

### Salesforce Contracts

The Salesforce Contracts app allows customers to manage the end-to-end lifecycle of Contracts. Contracts can be associated with opportunities, orders, quotes, standard Salesforce objects, and custom objects. A contract lifecycle management is crucial to the overall health of the sales processes in an organization. The Salesforce Contracts app gives you complete control over the sales process integration, contract management process, and contract lifecycle that starts from contract authoring to activation.

### 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 Features

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 Action Plans, Data Processing Engine, Discovery Framework, Identity Verification, and much more.

## Automotive Cloud

Use Salesforce Scheduler in Automotive Cloud to schedule test drive appointments and vehicle service appointments easily. Improve inventory visibility using enhanced search and filter capabilities. Find vehicles across locations by criteria such as model, color, transmission, type, and dealer name. Streamline the end-to-end warranty lifecycle from establishing service standards to processing and settling claims submitted by dealers.

### IN THIS SECTION:

#### [Salesforce Scheduler for Automotive Cloud](#)

Users, dealers, and customers can schedule appointments for service and maintenance jobs directly from a Vehicle record. Users and dealers can also schedule test drive appointments for a lead or an opportunity. The appointment scheduling process is made simple with an intuitive, guided OmniScript-based flow that helps you select the customer or prospect's preferences for the location, service resources, and the time slot.

#### [Inventory Visibility for Automotive Cloud](#)

Improve traceability of your vehicle inventory across users in your company by using the Criteria-Based Search and Filter search experience. Set up search criteria configurations to determine how users search for records and view the results. You can also customize the searchable object and its field mappings to improve the user experience. Users get near real-time visibility into the available vehicle stock at different locations and can make faster decisions around transferring inventory and meeting customer demands.

#### [Warranty Lifecycle Management for Vehicles and Parts](#)

Develop rules on warranty eligibility and entitlements for product families, products, and parts. Standardize the types of defects that the warranties cover and the labor services you provide. Help dealers submit descriptive warranty claims from an Experience Cloud site to share details on defective vehicles or spare parts, existing coverages, and claimed expenses. Set up an automated process to efficiently validate and adjudicate claims, or manually scrutinize selected claims from a single page.

#### [Vehicle and Asset Console Enhancements](#)

View claims and service appointments directly in the Vehicle Console. Get a 360-degree view of an asset in the all new Asset Console.

#### [Service Experience Enhancements in Automotive Cloud](#)

Nurture deeper customer relationships and empower customer service representative to be more productive with enhancements to the service console components in Manufacturing Cloud.

#### [Actionable Segmentation in Automotive Cloud \(Generally Available\)](#)

Segment and curate similar client profiles, and design timely and personalized client outreach programs with Actionable Segmentation.

#### [Actionable Relationship Center Enhancements](#)

Enhancements to the ARC graph give your users the ability to zoom in and out, show or hide card fields, and identify cards with child cards.

#### [Enhance Visits and Appointments with Virtual Calls and Video Visits](#)

Use Virtual Calls with Partner Visit Management and Automotive Scheduler capabilities so that you can set up video calls for visits and service appointments. Virtual Calls integrates with Amazon Web Services (AWS) Chime SDK to offer your users an easy-to-use, feature-rich video platform.

#### [Groups and Households Enhancements](#)

Group household members in a party relationship group and specify member roles and relationships using the New Group workflow. Add related contacts, groups, and business accounts, and specify their relationships with the group and its members. Combine two party relationship groups, modify member roles and relationships, and the relationships of related contacts, groups, and business accounts using the Merge workflow. Review related information such as cases and complaints that merge along with the groups and create tasks to check these records later.

### [Data Processing Engine Enhancements](#)

Orchestrate the calculation of advanced account forecasts and program-based business forecasts in Manufacturing Cloud using Data Processing Engine. Use a forecast node in a Data Processing Engine definition to generate forecasts based on today's data to make informed business decisions. Use variables of type expression in a formula node when you don't know the exact evaluation or calculation logic when creating a definition.

### [Maximize Your Revenue from Leads and Opportunities](#)

Get predictions about leads that are likely to convert to opportunities or accounts and about opportunities that are likely to convert to accounts. Focus on these leads and opportunities to maximize your revenue.

### [New and Changed Objects in Automotive Cloud](#)

Automotive Cloud includes these new and changed objects.

### [New and Changed Automotive Cloud Metadata Types](#)

Make the most of the new and changed metadata types that you can use with Automotive Cloud.

### [New and Changed Tooling Objects in Automotive Cloud](#)

Configure criteria-based search and filter in Automotive Cloud to improve inventory visibility of vehicles across locations.

### [New and Changed Connect REST API Resources](#)

These resources are new or have changes.

## Salesforce Scheduler for Automotive Cloud

Users, dealers, and customers can schedule appointments for service and maintenance jobs directly from a Vehicle record. Users and dealers can also schedule test drive appointments for a lead or an opportunity. The appointment scheduling process is made simple with an intuitive, guided OmniScript-based flow that helps you select the customer or prospect's preferences for the location, service resources, and the time slot.

### IN THIS SECTION:

#### [Salesforce Scheduler License Requirements in Automotive Cloud](#)

Starting with Summer '23, Salesforce Scheduler can be used to schedule appointments in Automotive Cloud. Get Salesforce Scheduler and Asset Scheduling capabilities to schedule vehicle service appointments and test drive appointments. With the Salesforce Scheduler add-on license users are entitled to 12,000 appointments per org per year. In addition to the entitlement per org, 300 appointments are available per user license per year for the Enterprise Edition licenses. For Unlimited Edition licenses, the limit increases to 600 appointments per user license per year. Accommodate more appointments with Salesforce Scheduler's add-on license. Salesforce Scheduler Additional Appointments AddOn license offers an added capacity of 12,000 appointments per pack.

#### [Delight and Engage Your Prospects by Scheduling Test Drives](#)

Schedule test drive appointments for prospective customers by using a guided flow directly from a Lead or an Opportunity record. Internal users such as sales agents, and partner users such as dealer representatives using the Experience Cloud sites can schedule test drives. Users can select the prospect's preferred vehicle model, the location that's nearest to them, and the time slot when a preferred service representative is available.

#### [Guarantee Timely Vehicle Maintenance by Scheduling Service Appointments](#)

Schedule vehicle service appointments by using a guided flow directly from a Vehicle record. Internal users such as service technicians for an original equipment manufacturer (OEM), partner users such as dealer service executives, and even customers can schedule vehicle service appointments. Users can select a service location, a vehicle, a service technician who assists with the repair or maintenance, and the preferred time slot for the appointment.



### [Customize Appointment Scheduling Processes Using OmniStudio](#)

The user interfaces, business flows, and processes for Automotive Scheduler are built using OmniStudio. Extend the predefined OmniScripts, FlexCards, DataRaptors, and Integration Procedures that are used in the test drive and vehicle service appointment scheduling flows. You can customize the appointment scheduling flow, its individual pages, components, and processes to meet your company's needs.

## Salesforce Scheduler License Requirements in Automotive Cloud

Starting with Summer '23, Salesforce Scheduler can be used to schedule appointments in Automotive Cloud. Get Salesforce Scheduler and Asset Scheduling capabilities to schedule vehicle service appointments and test drive appointments. With the Salesforce Scheduler add-on license users are entitled to 12,000 appointments per org per year. In addition to the entitlement per org, 300 appointments are available per user license per year for the Enterprise Edition licenses. For Unlimited Edition licenses, the limit increases to 600 appointments per user license per year. Accommodate more appointments with Salesforce Scheduler's add-on license. Salesforce Scheduler Additional Appointments AddOn license offers an added capacity of 12,000 appointments per pack.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions where Automotive Cloud and Automotive Scheduler are enabled.

**How:** Contact your Salesforce representative to learn about purchasing the Salesforce Scheduler Additional Appointments AddOn license.

## Delight and Engage Your Prospects by Scheduling Test Drives

Schedule test drive appointments for prospective customers by using a guided flow directly from a Lead or an Opportunity record. Internal users such as sales agents, and partner users such as dealer representatives using the Experience Cloud sites can schedule test drives. Users can select the prospect's preferred vehicle model, the location that's nearest to them, and the time slot when a preferred service representative is available.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Automotive Cloud, Automotive Scheduler, and OmniStudio Runtime are enabled.

**Who:** Internal users must have the Automotive Foundation User, Automotive Scheduler, and OmniStudio User permission sets assigned to them. Partner users must have the Automotive Foundation for Experience Cloud, Automotive Scheduler for Experience Cloud and OmniStudio Runtime for Communities permission sets assigned to them.

**Why:** Long waiting times often lead to a lost opportunity for revenue, especially when customers don't find the right vehicle, right location, or right slot for a test drive appointment. To ensure a smooth and quick appointment booking experience, sales agents and dealer reps can schedule a test drive based on a prospect's preference.

**How:** Click **Schedule Test Drive** on a Lead or Opportunity record. Select a dealer location, a vehicle, a service representative, and a time slot, and confirm the booking. For dealer users scheduling from an Experience Cloud site, the location is autoselected based on the dealer account's service territory.

## Guarantee Timely Vehicle Maintenance by Scheduling Service Appointments

Schedule vehicle service appointments by using a guided flow directly from a Vehicle record. Internal users such as service technicians for an original equipment manufacturer (OEM), partner users such as dealer service executives, and even customers can schedule vehicle service appointments. Users can select a service location, a vehicle, a service technician who assists with the repair or maintenance, and the preferred time slot for the appointment.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Automotive Cloud, Automotive Scheduler, and OmniStudio Runtime are enabled.

**Who:** Internal users must have the Automotive Foundation User, Automotive Scheduler, and OmniStudio User permission sets assigned to them. Partner and customer users must have the Automotive Foundation for Experience Cloud, Automotive Scheduler for Experience Cloud and OmniStudio Runtime for Communities permission sets assigned to them.

**Why:** A major factor contributing to an effective post-sales experience is the timely repair and maintenance of a vehicle. Customers, dealers, and the OEM service center agents must book vehicle service appointments for wheel and tire alignment, periodic checkups, and body and paint work on an appropriate schedule. By using the flow, users can select the service work type, the preferred service location, and the time slot when a preferred service technician is available.

**How:** Click **Schedule Service Appointment** on a Vehicle record. For dealer users scheduling from an Experience Cloud site, the location is autoselected based on the dealer account's service territory.

## Customize Appointment Scheduling Processes Using OmniStudio

The user interfaces, business flows, and processes for Automotive Scheduler are built using OmniStudio. Extend the predefined OmniScripts, FlexCards, DataRaptors, and Integration Procedures that are used in the test drive and vehicle service appointment scheduling flows. You can customize the appointment scheduling flow, its individual pages, components, and processes to meet your company's needs.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Automotive Cloud, Automotive Scheduler, and OmniStudio Runtime are enabled.

**Who:** Users must have the OmniStudio Admin permission set assigned to them, and the latest version of the OmniStudio package must be installed in the org.

## Inventory Visibility for Automotive Cloud

Improve traceability of your vehicle inventory across users in your company by using the Criteria-Based Search and Filter search experience. Set up search criteria configurations to determine how users search for records and view the results. You can also customize the searchable object and its field mappings to improve the user experience. Users get near real-time visibility into the available vehicle stock at different locations and can make faster decisions around transferring inventory and meeting customer demands.

### IN THIS SECTION:

#### [Build Your Own Search Experience to Track Vehicle Inventory](#)

Set up a search criteria configuration to determine how a user in your company searches for serialized inventory such as vehicles at various dealer locations. Use the Vehicle Searchable Field object as the basis for your search. This object combines fields from multiple source objects such as Location, Product, Product Item, Account, Vehicle, and Vehicle Definition. You can configure which fields to use as the basis for search criteria, and which fields to use as the search result columns. You can also select fields for sorting and aggregating the search results, and configure how the relative distance of a vehicle is calculated to filter the search results.

#### [Help Users Quickly Search for Vehicles Across Dealer Locations](#)

To provide an improved search experience to your users, add the Criteria-Based Search and Filter component to the Home page of the Automotive app. Inventory managers, sales managers, and other users can quickly search for vehicles based on multiple criteria, and then further refine the search results by sorting and aggregating the records.

#### [Transform Vehicle Inventory Data Using a Data Processing Engine Definition](#)

Get visibility into a single source of truth for vehicle inventory data in your company, and refresh the information at scheduled intervals. The new Update Vehicle Searchable Field Values Data Processing Engine (DPE) definition transforms data from multiple objects to create and update Vehicle Searchable Field records. The transformed data is used as the basis for inventory search so that users can find the most accurate results when they search by vehicle attributes. You can run the DPE definition through a custom flow.

### [Eliminate Guesswork by Helping Users Select Picklist Values as Search Criteria](#)

Map picklist fields on source objects with text fields on Vehicle Searchable Field to convert the text fields into picklist fields. Users don't need to type in their desired value or have to know the exact value for a search criteria field. Users can simply select a predefined picklist value to refine their search results leading to more accurate results.

### [Simplify Search Navigation by Helping Users Click Hyperlinks for Record Names](#)

Change search result record names from plain text to hyperlinks by converting text fields into lookup fields on the Vehicle Searchable Field object. Users can click a record name hyperlink to open a record from the list of search results.

## Build Your Own Search Experience to Track Vehicle Inventory

Set up a search criteria configuration to determine how a user in your company searches for serialized inventory such as vehicles at various dealer locations. Use the Vehicle Searchable Field object as the basis for your search. This object combines fields from multiple source objects such as Location, Product, Product Item, Account, Vehicle, and Vehicle Definition. You can configure which fields to use as the basis for search criteria, and which fields to use as the search result columns. You can also select fields for sorting and aggregating the search results, and configure how the relative distance of a vehicle is calculated to filter the search results.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Automotive Cloud and Criteria-Based Search and Filter are enabled.

**Who:** Users must have the Automotive Foundation User and Criteria-Based Search and Filter permission sets assigned to them.

**Why:** Companies often need an extensible framework to support vehicle inventory search because the relevant search data is spread across multiple objects and multiple fields. For example, an inventory manager wants to search on specific criteria such as all vehicles of a specific make and model available within five kilometers of a dealer location. The manager also wants to see the vehicle identification number and location name for each result record, and wants to aggregate the records by the vehicle exterior color. To support this requirement, you can configure a search template for vehicle inventory search, and select the required fields and attributes that power the search.

**How:** On the Criteria-Based Search and Filter Settings page in Setup, click **New** on the Search Configuration tab.

## Help Users Quickly Search for Vehicles Across Dealer Locations

To provide an improved search experience to your users, add the Criteria-Based Search and Filter component to the Home page of the Automotive app. Inventory managers, sales managers, and other users can quickly search for vehicles based on multiple criteria, and then further refine the search results by sorting and aggregating the records.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Automotive Cloud and Criteria-Based Search and Filter are enabled.

**Who:** Users must have the Automotive Foundation User and Criteria-Based Search and Filter permission sets assigned to them.

**How:** On the Home page of the Automotive app, click **Edit Page**. Drag the **Criteria-Based Search and Filter** component onto the page layout, and select one or more active search criteria configurations. Save and activate the page layout.

## Transform Vehicle Inventory Data Using a Data Processing Engine Definition

Get visibility into a single source of truth for vehicle inventory data in your company, and refresh the information at scheduled intervals. The new Update Vehicle Searchable Field Values Data Processing Engine (DPE) definition transforms data from multiple objects to create and update Vehicle Searchable Field records. The transformed data is used as the basis for inventory search so that users can find the most accurate results when they search by vehicle attributes. You can run the DPE definition through a custom flow.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Automotive Cloud and Criteria-Based Search and Filter are enabled.

**Who:** Users must have the Automotive Foundation User and Criteria-Based Search and Filter permission sets assigned to them.

**How:** On the Criteria-Based Search and Filter Settings page in Setup, click **New** on the Searchable Object Configuration tab. For Searchable Object, select **Vehicle Searchable Field**. For Data Synchronization Job, select your activated copy of the **Update Vehicle Searchable Field Values** DPE definition.

## Eliminate Guesswork by Helping Users Select Picklist Values as Search Criteria

Map picklist fields on source objects with text fields on Vehicle Searchable Field to convert the text fields into picklist fields. Users don't need to type in their desired value or have to know the exact value for a search criteria field. Users can simply select a predefined picklist value to refine their search results leading to more accurate results.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Automotive Cloud and Criteria-Based Search and Filter are enabled.

**Who:** Users must have the Automotive Foundation User and Criteria-Based Search and Filter permission sets assigned to them.

**Why:** The Vehicle Searchable Field object combines fields from multiple source objects, such as Product, Product Item, Asset, Vehicle, Location, and Vehicle Definition. For example, Door Style Type is a picklist type field on the Vehicle Definition object and it's also a text field on the Vehicle Searchable Field object. If you map the fields on both objects, the user doesn't need to type in Gull Wing as a search criteria to find vehicles that match this door type. The user can simply select a value from the predefined picklist already available on Vehicle Definition.

**How:** On the Criteria-Based Search and Filter Settings page in Setup, open a Searchable Object Configuration record. Click  in the Criteria Field Mapping section.

## Simplify Search Navigation by Helping Users Click Hyperlinks for Record Names

Change search result record names from plain text to hyperlinks by converting text fields into lookup fields on the Vehicle Searchable Field object. Users can click a record name hyperlink to open a record from the list of search results.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Automotive Cloud and Criteria-Based Search and Filter are enabled.

**Who:** Users must have the Automotive Foundation User and Criteria-Based Search and Filter permission sets assigned to them.

**Why:** The Vehicle Searchable Field object combines fields from multiple source objects, such as Product, Product Item, Asset, Vehicle, Location, and Vehicle Definition. Vehicle Definition ID is a lookup type field on the Vehicle Definition object and Vehicle Definition is a field on the Vehicle Searchable Field object. If you map Vehicle Definition ID with Vehicle Definition Name, the user can see a specific Vehicle Definition record name in the search results as a hyperlink. For example, the user searches for blue vehicles in the San Francisco location, and gets NeoSport LXs 2019 as one of the results. If you have selected Vehicle Definition as a search result column, and mapped the fields, the user can click the Vehicle Definition record hyperlink for NeoSport LXs 2019 to open the record details.

**How:** On the Criteria-Based Search and Filter Settings page in Setup, open a Searchable Object Configuration record. Click  in the Result Field Mapping section.

## Warranty Lifecycle Management for Vehicles and Parts

Develop rules on warranty eligibility and entitlements for product families, products, and parts. Standardize the types of defects that the warranties cover and the labor services you provide. Help dealers submit descriptive warranty claims from an Experience Cloud site to share details on defective vehicles or spare parts, existing coverages, and claimed expenses. Set up an automated process to efficiently validate and adjudicate claims, or manually scrutinize selected claims from a single page.

## IN THIS SECTION:

[Define Warranty Eligibility Using Warranty Term Coverages](#)

Define conditions of eligibility for warranty terms by creating warranty term coverages. Specify the parts of a product, types of faults in a product, and types of labor services that are included or excluded in a warranty term.

[Minimize Claim Processing Time By Helping Your Dealers Submit More Detailed Claims](#)

Dealers can use claim items to record information about defective vehicles like fault date, repair date, and usage with claim items when they submit claims from an Experience Cloud site. They can specify parts of the vehicle that caused defect with details like the type of defect, claimed amount, and applied warranty terms with claim coverages. You can minimize follow-ups with dealer users for additional information and make the adjudication process less error-prone.

[Capture Labor and Product Fault Details to Standardize Service Processes](#)

Develop comprehensive standards and reusable code sets to ensure accurate claims adjudication. Create product fault codes to standardize the types of faults in products that are covered under warranties. Create product labor codes to record the type of labor services and associated hours of effort required. Warranty managers can associate the type of faults with the type of labor services required by creating code set relationships.

[Verify and Settle Claims for Vehicle and Part Issues with Increased Accuracy](#)

Swiftly investigate vehicle and part defects, verify warranty coverages, and determine claim expenses by adjudicating claims. Claim adjudicators can manually adjudicate claims by reviewing claim information, determining expenses for the repair or part replacement, and adding comments — all from a single page. Or, you can enhance the productivity of claim adjudicators and reduce processing time by setting up an automated claims adjudication process.

## Define Warranty Eligibility Using Warranty Term Coverages

Define conditions of eligibility for warranty terms by creating warranty term coverages. Specify the parts of a product, types of faults in a product, and types of labor services that are included or excluded in a warranty term.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Automotive Cloud and Warranty Lifecycle Management are enabled.

**Who:** This feature is available to users with the Automotive Foundation User and Warranty Lifecycle Management permission sets.

**How:** On the Warranty Term Coverages related list of a Warranty Term record, create a Warranty Term Coverage record, and then specify the details of the record.

## Minimize Claim Processing Time By Helping Your Dealers Submit More Detailed Claims

Dealers can use claim items to record information about defective vehicles like fault date, repair date, and usage with claim items when they submit claims from an Experience Cloud site. They can specify parts of the vehicle that caused defect with details like the type of defect, claimed amount, and applied warranty terms with claim coverages. You can minimize follow-ups with dealer users for additional information and make the adjudication process less error-prone.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Automotive and Warranty Lifecycle Management are enabled.

**Who:** This feature is available to users with the Automotive Foundation for Experience Cloud, Warranty Lifecycle Management for Experience Cloud, and Claims Management Foundation permission sets.

**How:** Log into an Experience Cloud site for Automotive, and create Claim and related Claim Item records.

## Capture Labor and Product Fault Details to Standardize Service Processes

Develop comprehensive standards and reusable code sets to ensure accurate claims adjudication. Create product fault codes to standardize the types of faults in products that are covered under warranties. Create product labor codes to record the type of labor services and associated hours of effort required. Warranty managers can associate the type of faults with the type of labor services required by creating code set relationships.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Automotive and Warranty Lifecycle Management are enabled.

**Who:** This feature is available to users with the Automotive Foundation, Warranty Lifecycle Management, and Claims Management Foundation permission sets.

**How:** From the App Launcher, find and select **Product Fault Codes**, **Product Labor Codes**, or **Codeset Relationships**, and then click **New**. Specify the details of the record.

## Verify and Settle Claims for Vehicle and Part Issues with Increased Accuracy

Swiftly investigate vehicle and part defects, verify warranty coverages, and determine claim expenses by adjudicating claims. Claim adjudicators can manually adjudicate claims by reviewing claim information, determining expenses for the repair or part replacement, and adding comments — all from a single page. Or, you can enhance the productivity of claim adjudicators and reduce processing time by setting up an automated claims adjudication process.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Automotive and Warranty Lifecycle Management are enabled.

**Who:** This feature is available to users with the Automotive Foundation User, Warranty Lifecycle Management, and Claims Management Foundation permission sets.

**How:** To manually adjudicate claims, from the App Launcher, search and select **Claims**, and open a Claim record. Click **Claim Details**. On the Payment Details card, enter the adjusted amount and review comments.

To set up a process to automatically adjudicate claims, use Flow Builder or Business Rules Engine.

## Vehicle and Asset Console Enhancements

View claims and service appointments directly in the Vehicle Console. Get a 360-degree view of an asset in the all new Asset Console.

### IN THIS SECTION:

#### [Get a Unified View of an Asset and Capture Details](#)

Manage each stage in an asset's lifecycle with a unified, powerful console. View all relevant alerts, key milestones, and a timeline of work orders related to the asset. Track warranties, cases, work orders, and claim items related to an asset. Service agents can find all information related to an asset on a single page that's further powered by versatile service console components and platform capabilities.

#### [View All Claims Related to a Vehicle in a Single List](#)

View a list of all claims related to a Vehicle record on a related list. You can view claim items related to the vehicle's parent asset and the claim items for its related assets. While the related list for internal users is automatically available, the related list on a Vehicle record for Experience Cloud sites can be added using a custom related list.

#### [View All Appointments Related to a Vehicle in a Single List](#)

View a list of all appointments related to a Vehicle record on a related list. You can view scheduled, ongoing, and completed appointments for vehicle services. You can also view a list of test drive appointments for vehicles that are used as service resources. While the related list for internal users is automatically available, the related list on a Vehicle record for Experience Cloud sites can be added using a custom related list.

## Get a Unified View of an Asset and Capture Details

Manage each stage in an asset's lifecycle with a unified, powerful console. View all relevant alerts, key milestones, and a timeline of work orders related to the asset. Track warranties, cases, work orders, and claim items related to an asset. Service agents can find all information related to an asset on a single page that's further powered by versatile service console components and platform capabilities.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Automotive Cloud is enabled.

## View All Claims Related to a Vehicle in a Single List

View a list of all claims related to a Vehicle record on a related list. You can view claim items related to the vehicle's parent asset and the claim items for its related assets. While the related list for internal users is automatically available, the related list on a Vehicle record for Experience Cloud sites can be added using a custom related list.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Automotive Cloud and Warranty Lifecycle Management are enabled.

**Who:** Internal users must have the Automotive Foundation User, Warranty Lifecycle Management, and Claims Management Foundation permission sets assigned to them. External users must have the Automotive Foundation for Experience Cloud, Warranty Lifecycle Management for Experience Cloud, and Claims Management Foundation permission sets assigned to them.

## View All Appointments Related to a Vehicle in a Single List

View a list of all appointments related to a Vehicle record on a related list. You can view scheduled, ongoing, and completed appointments for vehicle services. You can also view a list of test drive appointments for vehicles that are used as service resources. While the related list for internal users is automatically available, the related list on a Vehicle record for Experience Cloud sites can be added using a custom related list.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Automotive Cloud and Automotive Scheduler are enabled.

**Who:** Internal users must have the Automotive Foundation User and Automotive Scheduler permission sets assigned to them. External users must have the Automotive Foundation for Experience Cloud and Automotive Scheduler for Experience Cloud permission sets assigned to them.

## Service Experience Enhancements in Automotive Cloud

Nurture deeper customer relationships and empower customer service representative to be more productive with enhancements to the service console components in Manufacturing Cloud.

### IN THIS SECTION:

#### [Identity Verification](#)

Customer service representatives (CSRs) can now verify the identity of customers who contact through standard SMS, standard and enhanced Facebook Messenger, and enhanced WhatsApp and add customers' verification answers to form fields. Admins can configure whether a verification field is shown as a form or radio button to CSRs. In addition administrators can configure the record page that's shown to CSRs after identity verification is successful. The identity verification flows, which have new names, have been updated, and developers can use a new API for form-based identity verification.

### Engagement Interactions

Customer service representatives (CSRs) can now accept customer requests through standard SMS, standard and enhanced Facebook Messenger, and enhanced WhatsApp. CSRs can create list views to filter their Engagement Attendee, Engagement Interaction, and Engagement Topic records. In addition, CSRs can experience better user interface performance due to the migration of engagement-related user interface components from Aura to Lightning Web Component (LWC). Moreover, CSRs can benefit from improved accessibility due to compliance with the color contrast requirements of Web Content Accessibility Guidelines (WCAG) 2.1. Administrators can create LWC quick actions on Engagement Interaction, Engagement Attendee, and Engagement Topic objects.

### Audit Trail

Monitor and analyze customers' secondary identity verification audit records to detect potential cases of compliance fraud and identity breach. Access all filter options in a pop-up window. Filter audit records based on verification status and initiating attendee. View communication channel and verification type information. For audit records of secondary verification type, view primary and secondary verification details by clicking a hyperlink in the Initiating Attendee Type column. Export audit records in CSV format. Get email notification about the success or failure of the export request. Download or delete the exported file using the Audit Trail Export Dashboard.

### Service Process Studio

Admins can clone service process definitions, group the service process data attributes into sections and organize these sections, and define lookup-type extended data attributes. Customer service representatives can view all the service process data attributes on the Case Details Lightning component.

### Action Launcher

Customer service representatives (CSRs) can quickly resolve customer requests by launching out-of-the-box OmniScripts. CSRs can select an OmniScript, flow, or flow orchestration to navigate to the action's previously opened subtab without losing the information entered earlier. CSRs can open quick actions containing a Visualforce page. Furthermore, CSRs can benefit from improved accessibility due to compliance with the color contrast requirements of Web Content Accessibility Guidelines (WCAG) 2.1. Additionally, CSRs can see up to 10 recently used actions listed in Action Launcher. Administrators can enable self-service for customers through Experience Cloud. Also, admins can now select the Engagement Interaction object while creating a deployment.

### Record Alerts

Provide access to record alerts. Refine record alerts by using Business Rules Engine. Show alerts from your external systems using Data Consumption Framework.

## Identity Verification

Customer service representatives (CSRs) can now verify the identity of customers who contact through standard SMS, standard and enhanced Facebook Messenger, and enhanced WhatsApp and add customers' verification answers to form fields. Admins can configure whether a verification field is shown as a form or radio button to CSRs. In addition administrators can configure the record page that's shown to CSRs after identity verification is successful. The identity verification flows, which have new names, have been updated, and developers can use a new API for form-based identity verification.

SEE ALSO:

[Identity Verification](#)



## Engagement Interactions

Customer service representatives (CSRs) can now accept customer requests through standard SMS, standard and enhanced Facebook Messenger, and enhanced WhatsApp. CSRs can create list views to filter their Engagement Attendee, Engagement Interaction, and Engagement Topic records. In addition, CSRs can experience better user interface performance due to the migration of engagement-related user interface components from Aura to Lightning Web Component (LWC). Moreover, CSRs can benefit from improved accessibility due to compliance with the color contrast requirements of Web Content Accessibility Guidelines (WCAG) 2.1. Administrators can create LWC quick actions on Engagement Interaction, Engagement Attendee, and Engagement Topic objects.

SEE ALSO:

[Engagement](#)

## Audit Trail

Monitor and analyze customers' secondary identity verification audit records to detect potential cases of compliance fraud and identity breach. Access all filter options in a pop-up window. Filter audit records based on verification status and initiating attendee. View communication channel and verification type information. For audit records of secondary verification type, view primary and secondary verification details by clicking a hyperlink in the Initiating Attendee Type column. Export audit records in CSV format. Get email notification about the success or failure of the export request. Download or delete the exported file using the Audit Trail Export Dashboard.

SEE ALSO:

[Audit Trail](#)

## Service Process Studio

Admins can clone service process definitions, group the service process data attributes into sections and organize these sections, and define lookup-type extended data attributes. Customer service representatives can view all the service process data attributes on the Case Details Lightning component.

SEE ALSO:

[Service Process Studio](#)

## Action Launcher

Customer service representatives (CSRs) can quickly resolve customer requests by launching out-of-the-box OmniScripts. CSRs can select an OmniScript, flow, or flow orchestration to navigate to the action's previously opened subtab without losing the information entered earlier. CSRs can open quick actions containing a Visualforce page. Furthermore, CSRs can benefit from improved accessibility due to compliance with the color contrast requirements of Web Content Accessibility Guidelines (WCAG) 2.1. Additionally, CSRs can see up to 10 recently used actions listed in Action Launcher. Administrators can enable self-service for customers through Experience Cloud. Also, admins can now select the Engagement Interaction object while creating a deployment.

SEE ALSO:

[Action Launcher](#)

## Record Alerts

Provide access to record alerts. Refine record alerts by using Business Rules Engine. Show alerts from your external systems using Data Consumption Framework.

SEE ALSO:

[Record Alerts](#)

## Actionable Segmentation in Automotive Cloud (Generally Available)

Segment and curate similar client profiles, and design timely and personalized client outreach programs with Actionable Segmentation.

IN THIS SECTION:

[Actionable List Definitions](#)

You can now create actionable list definitions using Opportunity, Asset, and Vehicle records, in addition to Account, Contact, and Lead records. The dataset associated with an actionable list definition contains records that you can use as a data source to create actionable lists.

[Actionable List Members](#)

Large actionable lists are now configured asynchronously. List creators can update the engagement status of prospects, including existing customers. In addition, list creators can perform bulk actions on prospect records and configure the sort field and the order in which prospects are sorted in the Outreach List component.

[Outreach List](#)

Sales and service agents can now search for and select an actionable list to view the associated prospects, including existing customers. Actionable lists are grouped by their priority. Agents can now see the assigned prospects in accordion view. The field and value used to sort the prospects are also shown to agents, and prospects are grouped by their engagement status. In addition, agents can update the engagement status of prospects and call them. Developers can use two new APIs to get actionable list records and metadata.

SEE ALSO:

[Actionable Segmentation \(Generally Available\)](#)

## Actionable List Definitions

You can now create actionable list definitions using Opportunity, Asset, and Vehicle records, in addition to Account, Contact, and Lead records. The dataset associated with an actionable list definition contains records that you can use as a data source to create actionable lists.

## Actionable List Members

Large actionable lists are now configured asynchronously. List creators can update the engagement status of prospects, including existing customers. In addition, list creators can perform bulk actions on prospect records and configure the sort field and the order in which prospects are sorted in the Outreach List component.

SEE ALSO:

[Actionable List Members](#)

## Outreach List

Sales and service agents can now search for and select an actionable list to view the associated prospects, including existing customers. Actionable lists are grouped by their priority. Agents can now see the assigned prospects in accordion view. The field and value used to sort the prospects are also shown to agents, and prospects are grouped by their engagement status. In addition, agents can update the engagement status of prospects and call them. Developers can use two new APIs to get actionable list records and metadata.

SEE ALSO:

[Outreach List](#)

## Actionable Relationship Center Enhancements

Enhancements to the ARC graph give your users the ability to zoom in and out, show or hide card fields, and identify cards with child cards.

SEE ALSO:

[Actionable Relationship Center](#)

## Enhance Visits and Appointments with Virtual Calls and Video Visits

Use Virtual Calls with Partner Visit Management and Automotive Scheduler capabilities so that you can set up video calls for visits and service appointments. Virtual Calls integrates with Amazon Web Services (AWS) Chime SDK to offer your users an easy-to-use, feature-rich video platform.

SEE ALSO:

[https://help.salesforce.com/s/articleView?id=sf.video\\_call.htm&type=5](https://help.salesforce.com/s/articleView?id=sf.video_call.htm&type=5)

## Groups and Households Enhancements

Group household members in a party relationship group and specify member roles and relationships using the New Group workflow. Add related contacts, groups, and business accounts, and specify their relationships with the group and its members. Combine two party relationship groups, modify member roles and relationships, and the relationships of related contacts, groups, and business accounts using the Merge workflow. Review related information such as cases and complaints that merge along with the groups and create tasks to check these records later.

SEE ALSO:

[Create and Merge Party Relationship Groups Using Guided Workflows](#)

## Data Processing Engine Enhancements

Orchestrate the calculation of advanced account forecasts and program-based business forecasts in Manufacturing Cloud using Data Processing Engine. Use a forecast node in a Data Processing Engine definition to generate forecasts based on today's data to make informed business decisions. Use variables of type expression in a formula node when you don't know the exact evaluation or calculation logic when creating a definition.

SEE ALSO:

[Data Processing Engine](#)

## Maximize Your Revenue from Leads and Opportunities

Get predictions about leads that are likely to convert to opportunities or accounts and about opportunities that are likely to convert to accounts. Focus on these leads and opportunities to maximize your revenue.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions where Automotive Cloud, CRM Analytics for Automotive Cloud, AI Accelerator, and Scoring Framework are enabled.

**Who:** The Lead Conversion Score (Automotive Cloud) and Opportunity to Account Conversion Score (Automotive Cloud) template configuration types in Scoring Framework are available to users with the Revenue Intelligence for Automotive license.

**How:** To get predictions, on the new Scoring Framework page in Setup, create a CRM Analytics template configuration by using the relevant template configuration type.

SEE ALSO:

[Scoring Framework \(Generally Available\)](#)

[Salesforce Help: Lead and Opportunity Conversion Predictions by Using Scoring Framework \(can be outdated or unavailable during release preview\)](#)

## New and Changed Objects in Automotive Cloud

Automotive Cloud includes these new and changed objects.

### New Objects

Here are the new objects in Automotive Cloud.

#### Store details about a warranty claim

Use the new `Claim` object.

#### Store details about a defective product related to a warranty claim

Use the new `ClaimItem` object.

#### Store details about a causal part in a defective asset

Use the new `ClaimCoverage` object.

#### Store details about expenses, repairs, and labor services to rectify a causal part

Use the new `ClaimCoveragePaymentDetail` object.

#### Associate a claim with an account

Use the new `ClaimParticipant` object.

#### Store details about a code set on a standardized definition of a situation or an activity

Use the new `CodeSet` object.

**Associate a code set with a related code set**

Use the new `CodesetRelationship` object.

**Associate a code set on a product fault with a product or a product family**

Use the new `ProductFaultCode` object.

**Associate a code set on a labor code with a product or a product family**

Use the new `ProductLaborCode` object.

**Store details about labor, parts, expenses, and exchanges related to a product**

Use the new `Warranty Term` object.

**Associate a warranty term to a product or a product family**

Use the new `Product Warranty Term` object.

**Associate a warranty term to an asset to specify extensions or exclusions for the assigned warranty term.**

Use the new `Asset Warranty Term` object.

**Store details about extended or restricted coverage of a warranty term based on a code set or causal part**

Use the new `WarrantyTermCoverage` object.

## Changed Objects

Here is the changed object in Automotive Cloud.

**Store details about the product usage that's covered in a warranty term**

Use the new `Vehicle Sales Report` picklist value for the `Claim Type` field on the `RebateClaim` object.

## New and Changed Automotive Cloud Metadata Types

Make the most of the new and changed metadata types that you can use with Automotive Cloud.

### Settings

**Enable Salesforce Scheduler features in Automotive Cloud to schedule vehicle service and test drive appointments**

Use the new `enableAutomotiveScheduler` field on the `IndustriesAutomotiveSettings` metadata type.

**Enable criteria-based search and filter features in Automotive Cloud to help users search for vehicle inventory across locations**

Use the new `enableCriteriaBasedSearchAndFilter` field on the `IndustriesSettings` metadata type.

### Criteria-based search metadata types

**Retrieve, deploy, update, create, and view searchable object data sync information/search criteria configurations for criteria-based search and filter.**

Use the new `SearchableObjDataSyncInfo` and the `SearchCriteriaConfiguration` metadata type.

## New and Changed Tooling Objects in Automotive Cloud

Configure criteria-based search and filter in Automotive Cloud to improve inventory visibility of vehicles across locations.

**Define distance criteria for inventory search, and select fields for querying data, and for displaying, aggregating, and sorting search results**

Use the new `SearchCriteriaConfiguration` object.

**Define which object is used for inventory search, how frequently the data is synchronized, and which Data Processing Engine definition is used to synchronize data in the object**

Use the new `SearchableObjDataSyncInfo` object.

## New and Changed Connect REST API Resources

These resources are new or have changes.

### Automotive Cloud

**Get the unified object search configuration metadata**

Make a GET request to the new `/connect/criteria-based-search/configurations` resource.

New response body:

Unified Object Search Config Metadata Result

**SEE ALSO:**

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

## Consumer Goods Cloud

Empower your service reps to provide world-class customer service with the new Consumer Goods Cloud—Service app. Efficiently calculate order prices online with Penny Perfect Pricing and plan store visits using the mobile app. Embed interactive dashboards and leverage CRM analytics to monitor the effectiveness of your trade promotions. Additionally, with Copy promotion, you can let your users reuse all successful promotions.

**EDITIONS**

Available in: Enterprise, Performance, and Unlimited editions.

**IN THIS SECTION:**[Improve Customer Satisfaction with Consumer Goods Cloud for Service](#)

Give your service agents easy access to accounts, visits, orders, and engagement history records so that they have all the information necessary to plan and provide personalized customer service. Service agents can also drive revenue growth by placing orders over calls using Order Management and Penny Perfect Pricing.

[Stay Connected with Processing Services by Updating Your Certificate](#)

Processing service certificates are valid for one year. You receive an email 30 days before your certificate expires. Replace the outdated certificate in the connected app with a new certificate and never lose connectivity with your processing services. Download the latest certificate, upload it to your connected app, and then confirm that you replaced the certificate.

[Einstein Vision for Planogram Compliance Is Being Retired](#)

Einstein Vision for Planogram Compliance is scheduled for retirement in all Salesforce orgs on July 31, 2023. Sales representatives can continue to record the observations of a planogram task manually.

[Other Improvements in Consumer Goods Cloud](#)

Learn about other important improvements to the Consumer Goods Cloud.

[Retail Execution](#)

Use Penny Perfect Pricing on the Consumer Goods (desktop) app to accurately calculate order prices online and the Consumer Goods Offline Mobile app to efficiently plan store visits.

### New Retail Metadata Types

Make the most of the new metadata types of Consumer Goods.

### Trade Promotion Management

Embed interactive dashboards in promotions. Use CRM Analytics in dashboards to measure and monitor the effectiveness of your trade promotions. In a customer business plan (CBP), evaluate multiple scenarios and quickly calculate data for the account and related promotions.

### Consumer Goods Cloud Videos

New videos help you learn about the capabilities of Consumer Goods Cloud.

### Changed Objects in Consumer Goods Cloud

Do more with updated objects for Retail Execution in Consumer Goods Cloud.

## Improve Customer Satisfaction with Consumer Goods Cloud for Service

Give your service agents easy access to accounts, visits, orders, and engagement history records so that they have all the information necessary to plan and provide personalized customer service. Service agents can also drive revenue growth by placing orders over calls using Order Management and Penny Perfect Pricing.

**Where:** This change applies to Enterprise, Performance, and Unlimited editions where Consumer Goods Cloud—Service and Consumer Goods Cloud for Sales and Service is enabled.

**Who:** This feature is available to users with Consumer Goods Cloud Service license, Action Plans license, Industries Visit license, CGCloud Processing Services license, Industries Service Excellence license, Penny-Perfect Pricing license, and OmniStudio Runtime license.

The screenshot displays the Salesforce interface for a service agent named Peter Miller. The top navigation bar includes tabs for 'Service Excellence', 'Accounts', and a search bar. The main content area is divided into several sections:

- Left Sidebar:** Contains the account details for 'NTO Store #201' (235 Central Ave SW, Atlanta, GA 30303, US) and the agent's profile for Peter Miller (Store Manager, 416-234-1234).
- Timeline:** A vertical list of recent events including 'Engagement Interaction' (February 15, 2022 4:05 PM), 'Order O-00103' (January 31, 2022 9:23 AM), 'Visit' (January 11, 2022 2:55 PM), and another 'Engagement Interaction' (December 01, 2021 10:05 PM).
- Actions:** A section with buttons for 'Create Task' and 'Create Case', and a search bar for actions or flows.
- Notifications:** A list of notifications, including 'INV-388003 - Partially paid invoice due on 10/29/2023, Open amount 3500.00' and 'INV-388004 - Unpaid Invoice due on 10/29/2023, Open amount 6500.00'.
- Advanced Orders Table:** A table listing orders with columns for Name, Order ID, Responsible, Template, Date, Phase, and Value. The table shows multiple orders for various representatives (Joel Rep, Chantelle Rep, Lisa Rep) with different phases (Draft, Released, Return).
- Call Controls:** A section for managing calls, showing a 'Connected' status and a phone number '+1(987) 654-3210'.
- Knowledge:** A section for searching knowledge articles, showing 'Einstein Recommendations' and a list of articles with relevance scores.

The bottom status bar indicates 'Omni-Channel (Online)'.

## Stay Connected with Processing Services by Updating Your Certificate

Processing service certificates are valid for one year. You receive an email 30 days before your certificate expires. Replace the outdated certificate in the connected app with a new certificate and never lose connectivity with your processing services. Download the latest certificate, upload it to your connected app, and then confirm that you replaced the certificate.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions where either Consumer Goods Cloud or Consumer Goods Cloud Trade Promotion Management is enabled.

SEE ALSO:

[Salesforce Help: Replace a Processing Service Certificate](#)

## Einstein Vision for Planogram Compliance Is Being Retired

Einstein Vision for Planogram Compliance is scheduled for retirement in all Salesforce orgs on July 31, 2023. Sales representatives can continue to record the observations of a planogram task manually.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions that have the Consumer Goods Cloud license.

SEE ALSO:

[Knowledge Article: Einstein Vision for Planogram Compliance Retirement](#)

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

[Salesforce Help: Validate Planogram Compliance Information \(can be outdated or unavailable during release preview\)](#)

[Consumer Goods Cloud Developer Guide: Einstein Object Detection Standard Objects](#)

[Consumer Goods Cloud Developer Guide: Einstein Object Detection REST APIs](#)

## Other Improvements in Consumer Goods Cloud

Learn about other important improvements to the Consumer Goods Cloud.

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

**Who:** These features are available to sales supervisors and key account managers (KAM) who have the CGCloud Sales Support and the CGCloud KAM permission set respectively.

**Why:** Your users can now:

- Focus on cost-effective promotions, streamline promotion management, and improve user experience by removing obsolete promotions permanently using the Delete Promotion feature.
- Recreate sellable promotions quickly from successful promotions by copying the promotion header and components such as Tactics and Tactic Products of well-received promotions. You can copy promotions either from your account or a different account.

SEE ALSO:

[Salesforce Help: Assign a Child Promotion Template to a Promotion Template](#)

[Salesforce Help: Copy a Promotion](#)



## Retail Execution

Use Penny Perfect Pricing on the Consumer Goods (desktop) app to accurately calculate order prices online and the Consumer Goods Offline Mobile app to efficiently plan store visits.

### IN THIS SECTION:

#### [Get Accurate Order Prices Online with Penny Perfect Pricing](#)

Penny Perfect Pricing helps sales reps calculate order prices online based on the same pricing conditions and configuration that they use in the Offline Mobile app. Reps can calculate prices for orders with different scales, units of measure, and conditions such as discounts, amount per unit, and flat rates.

#### [Maintain Store Operating Hours Efficiently in Consumer Goods Cloud Offline Mobile App](#)

Your reps can now update a store's open hours and plan store visits efficiently using the Consumer Goods Cloud Offline Mobile App. Reps can edit and maintain Operating Hour records only if operating hours aren't reused across multiple accounts. To avoid overriding operating hours across linked accounts, enable editing only for operating hours that aren't used across multiple accounts.

#### [Improved User Experience with the Enhanced Product Filter](#)

By using the enhanced product filters in Consumer Goods Cloud Desktop app, users now see only the products associated with their sales org, which saves time and effort. Previously, product searches returned results from other sales orgs too.

#### [Boost Productivity with the New Order Lightning Web Component](#)

Give your sales reps a better advanced order creation and management experience by using the new Order Lightning Web Component (Order LWC). Reps can quickly navigate through the editable order fields, such as quantity, discount, and special price. The Order LWC experience is the default setting and supports both Simple Pricing and Penny Perfect Pricing.

#### [Analyze and Track Product Performance Easily](#)

Use the new Analytics for Consumer Goods—Advanced Data Model app to analyze your account performance and make informed decisions to increase revenue and compliance. Sales managers can gain insights into revenue by territory, assess sales executive performance, identify product whitespace opportunities in high-potential stores, and analyze the correlation between store visits, compliance, and revenue. Sales representatives get a quick view of their performance based on sales revenue, team average, most sold product categories, store visits, and compliance to identify areas that need attention.

## Get Accurate Order Prices Online with Penny Perfect Pricing

Penny Perfect Pricing helps sales reps calculate order prices online based on the same pricing conditions and configuration that they use in the Offline Mobile app. Reps can calculate prices for orders with different scales, units of measure, and conditions such as discounts, amount per unit, and flat rates.

**Where:** This change applies to Lightning Experience and all versions of the Salesforce app in Enterprise, Performance, and Unlimited editions that have Consumer Goods Cloud and the Consumer Goods Cloud enhanced data model enabled.

**Who:** Penny Perfect Pricing is available only to users with the Penny Perfect Pricing license and the Penny Perfect Pricing permission set.

**How:** Use pricing condition templates and calculation schemas to define how the penny-perfect calculation is initiated and run on Consumer Goods Desktop app and Consumer Goods Offline Mobile app.

### SEE ALSO:

[Salesforce Help: Penny Perfect Pricing](#)

## Maintain Store Operating Hours Efficiently in Consumer Goods Cloud Offline Mobile App

Your reps can now update a store's open hours and plan store visits efficiently using the Consumer Goods Cloud Offline Mobile App. Reps can edit and maintain Operating Hour records only if operating hours aren't reused across multiple accounts. To avoid overriding operating hours across linked accounts, enable editing only for operating hours that aren't used across multiple accounts.

**Where:** This change applies to Lightning Experience and all versions of the Salesforce app in Enterprise, Performance, and Unlimited editions that have Consumer Goods Cloud and the Consumer Goods Cloud enhanced data model enabled.

**How:** To edit the time slots for setting the store open hours, set the Account\_Operating\_Hour\_Enabled system setting in Custom Settings to True.

SEE ALSO:

[Salesforce Help: Make Operating Hours Editable for Consumer Goods Cloud Offline Mobile App](#)

## Improved User Experience with the Enhanced Product Filter

By using the enhanced product filters in Consumer Goods Cloud Desktop app, users now see only the products associated with their sales org, which saves time and effort. Previously, product searches returned results from other sales orgs too.

**Where:** This change applies to Lightning Experience and all versions of the Salesforce app in Enterprise, Performance, and Unlimited editions that have Consumer Goods Cloud and the Consumer Goods Cloud enhanced data model enabled.

## Boost Productivity with the New Order Lightning Web Component

Give your sales reps a better advanced order creation and management experience by using the new Order Lightning Web Component (Order LWC). Reps can quickly navigate through the editable order fields, such as quantity, discount, and special price. The Order LWC experience is the default setting and supports both Simple Pricing and Penny Perfect Pricing.

**Where:** This change applies to Lightning Experience and all versions of the Salesforce app in Enterprise, Performance, and Unlimited editions that have Consumer Goods Cloud and the Consumer Goods Cloud enhanced data model enabled.

**How:** To view the new and improved Order LWC, from the App Launcher, find and select **Advanced Orders**, and then click **New Advanced Order**.

Advanced Order  
Order Id - O-00049 Submit

Customer: \*NTO Store #201    Order Name: O-00049    Order Template: Standard    Initiator: J. Durbin (Admin)    Gross Total Value: 4164.23 USD    Value(Receipt): 4164.23 USD

Order Items    Order Header    Approval History

All Items    Basket + Add Item

Description	Quantity	Category	Consumer Geo...	GTIN	UoM	Order Item Te...	Discount	Price	Value
*Dash Cranberry	57	Beverages	20101010001	4012345000436	Layer	Standard	0	60.60	3,454.20
*Dash Cranberry	4	Beverages	20101010001	4012345000436	ConsumerUnit	Standard	0	1.01	4.04
*Dash Cranberry	7	Beverages	20101010001	4012345000436	SalesUnit	Standard	0	6.06	42.42
*Apples Diet Cream Wafers Cri...	54	Snacks	110101000002	408000000000	SalesUnit	Standard	0	11.94	644.76
*Apples Diet Cream Wafers Cri...	9	Snacks	110101000002	408000000000	ConsumerUnit	Standard	0	1.99	17.91
0,33 L Glass Bottle Standard	6	Beverages	130100000048	9002057301052	ConsumerUnit	Standard	0	0.00	0.00
0,33 L Glass Bottle Standard	6	Beverages	130100000048	9002057301052	ConsumerUnit	Standard	0	0.00	0.00
0,5 L PET Bottle Standard	4	Beverages	130100000012	9002057041052	ConsumerUnit	Standard	0	0.00	0.00
0,5 L PET Bottle Standard	4	Beverages	130100000012	9002057041052	ConsumerUnit	Standard	0	0.00	0.00

Cancel Save

SEE ALSO:

[Salesforce Help: Create an Order](#)

## Analyze and Track Product Performance Easily

Use the new Analytics for Consumer Goods—Advanced Data Model app to analyze your account performance and make informed decisions to increase revenue and compliance. Sales managers can gain insights into revenue by territory, assess sales executive performance, identify product whitespace opportunities in high-potential stores, and analyze the correlation between store visits, compliance, and revenue. Sales representatives get a quick view of their performance based on sales revenue, team average, most sold product categories, store visits, and compliance to identify areas that need attention.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions where Consumer Goods Cloud and CRM Analytics are enabled.

**Who:** Available only to Consumer Goods Cloud users with the Consumer Goods Cloud Intelligence add-on license.

**How:** From CRM Analytics Studio, in the Quick Find box, click **Create**, and then select **App**. Find and select **Analytics for Consumer Goods - Advanced Data Model** app template and follow the instructions in the wizard to create your app.

## New Retail Metadata Types

Make the most of the new metadata types of Consumer Goods.

### Metadata Type

#### Reassign and edit visits created by team members

Use the new `EnableVisitSharing` field on the existing `RetailExecutionSettings` metadata type.

## Trade Promotion Management

Embed interactive dashboards in promotions. Use CRM Analytics in dashboards to measure and monitor the effectiveness of your trade promotions. In a customer business plan (CBP), evaluate multiple scenarios and quickly calculate data for the account and related promotions.

### IN THIS SECTION:

#### [Get Started with Trade Promotion Effectiveness](#)

Use the new Trade Promotion Effectiveness (TPE) Analytics app to measure and monitor the effectiveness of your trade promotions. TPE dashboards help you make better business decisions, which lead to increased sales and revenue and improved customer satisfaction. Use standard CRMA dashboards to analyze data for volumes, assortments, spend, and tactics. Embed customized dashboards or widgets in specific Lightning Experience pages in TPM to provide in-context insights.

#### [View Interactive Dashboards in Promotions](#)

Use the TPM Promotion Analytics Dashboard component to embed dashboards and dashboard components in promotion pages. In edit mode, see interactive visualizations of your data and apply filters to the promotion's displayed values and related records. Use JSON strings to specify types of filters or dashboard selections that you can't create using the Filter Builder.

#### [Make Quicker Decisions While Planning](#)

When you modify promotions and manually adjust editable KPIs in a customer business plan (CBP), you can now quickly save and calculate your CBP. The CBP calculates data for the account and related promotions and displays the latest KPI metrics with the impact of your changes.

#### [Plan Better By Evaluating Customer Business Plan Scenarios \(Pilot\)](#)

Evaluate different customer business plan (CBP) scenarios to maximize revenue and sales while planning for current and future financial years. Use the active CBP to create multiple scenarios for evaluation. Exclude promotions from a scenario in the CBP to simulate different strategies.

#### [Export More KPI Reports Simultaneously](#)

Now you can export up to 10 KPI reports simultaneously instead of 5. The reports can be exported with KPIs in either columns or rows.

#### [Get Started with Consumer Goods Cloud Faster with MuleSoft Direct](#)

Integrate data seamlessly and connect accounts, products, and their hierarchies from third-party systems to Consumer Goods Cloud without leaving the Salesforce platform. Use the pre-built APIs to quickly connect to Enterprise Resource Planning (ERP) systems and get started with Consumer Goods Cloud with just a few clicks.

## Get Started with Trade Promotion Effectiveness

Use the new Trade Promotion Effectiveness (TPE) Analytics app to measure and monitor the effectiveness of your trade promotions. TPE dashboards help you make better business decisions, which lead to increased sales and revenue and improved customer satisfaction. Use standard CRMA dashboards to analyze data for volumes, assortments, spend, and tactics. Embed customized dashboards or widgets in specific Lightning Experience pages in TPM to provide in-context insights.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions where Consumer Goods Cloud Trade Promotion Management and CRM Analytics are enabled.

**Who:** TPE is available only to Consumer Goods Cloud Trade Promotion Management users with the Consumer Goods Cloud Intelligence or the CRMA for CG add-on license.

**How:** From Setup, find and select **Feature Settings**. Under Consumer Goods Cloud, go to the TPE Dashboard Configuration section. Follow the instructions in the setup flow.

SEE ALSO:

[Salesforce Help: Trade Promotion Effectiveness](#)

## View Interactive Dashboards in Promotions

Use the TPM Promotion Analytics Dashboard component to embed dashboards and dashboard components in promotion pages. In edit mode, see interactive visualizations of your data and apply filters to the promotion's displayed values and related records. Use JSON strings to specify types of filters or dashboard selections that you can't create using the Filter Builder.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions where Consumer Goods Cloud Trade Promotion Management is enabled.

**How:** Add the TPM Promotion Analytics Dashboard component to the Promotion Record Page in the Lightning App Builder.

SEE ALSO:

[Salesforce Help: Add Interactive Dashboards to Your Promotions](#)

## Make Quicker Decisions While Planning

When you modify promotions and manually adjust editable KPIs in a customer business plan (CBP), you can now quickly save and calculate your CBP. The CBP calculates data for the account and related promotions and displays the latest KPI metrics with the impact of your changes.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions where Consumer Goods Cloud Trade Promotion Management is enabled.

SEE ALSO:

[Salesforce Help: Calculate a Customer Business Plan](#)

## Plan Better By Evaluating Customer Business Plan Scenarios (Pilot)

Evaluate different customer business plan (CBP) scenarios to maximize revenue and sales while planning for current and future financial years. Use the active CBP to create multiple scenarios for evaluation. Exclude promotions from a scenario in the CBP to simulate different strategies.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions where Consumer Goods Cloud Trade Promotion Management is 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.

SEE ALSO:

[Salesforce Help: Customer Business Plan Scenarios \(Pilot\)](#)

## Export More KPI Reports Simultaneously

Now you can export up to 10 KPI reports simultaneously instead of 5. The reports can be exported with KPIs in either columns or rows.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions where Consumer Goods Cloud Trade Promotion Management is enabled.

SEE ALSO:

[Consumer Goods Cloud Real Time Reporting Developer Guide: Triggering the CSV Export Process](#)

## Get Started with Consumer Goods Cloud Faster with MuleSoft Direct

Integrate data seamlessly and connect accounts, products, and their hierarchies from third-party systems to Consumer goods Cloud without leaving the Salesforce platform. Use the pre-built APIs to quickly connect to Enterprise Resource Planning (ERP) systems and get started with Consumer Goods Cloud with just a few clicks.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions where Consumer Goods Cloud Trade Promotion Management is enabled.

SEE ALSO:

[Mulesoft Help: Boost your bottom line](#)

[Mulesoft Help: MuleSoft Accelerator for Consumer Goods](#)

## Consumer Goods Cloud Videos

New videos help you learn about the capabilities of Consumer Goods Cloud.

-  [Set Up Activities for Store Audits](#) shows how you can set up standard activities to conduct store audits in Consumer Goods Cloud.

## Changed Objects in Consumer Goods Cloud

Do more with updated objects for Retail Execution in Consumer Goods Cloud.

### Augment Customer Set analysis to identify and design similar stores

To flag customer sets when grouping similar stores, use the new `Group_Similar_Stores__c` boolean field in the existing `Account_Set__c` object. This field is consumed by Store Group and Account Performance (Embedded), Whitespace Analysis, and Whitespace (Embedded) dashboards.

## Financial Services Cloud

Actionable Segmentation is now generally available and has new features that help design timely and personalized client outreach programs. You can get helpful predictions about customers to prioritize using Scoring Framework. Enable your Customer Community users to quickly update their addresses or request a fee reversal on Financial Services Client Portal. Do more with the enhancements to Service Process Studio and Discovery Framework. Use the new guided setup for Revenue Management to speed up the CRM analytics app creation for Revenue Management.

IN THIS SECTION:

[Financial Services Cloud Guide Changes](#)

The Financial Services Cloud Installation Guide is now in Salesforce Help. The Quick Start Guide content has merged into the Admin Guide. The Upgrade Guide is retired.

### [Financial Services Cloud Admin Guide](#)

The Financial Services Cloud Admin Guide is now in Salesforce Help.

### [Actionable Segmentation \(Generally Available\)](#)

Segment and curate similar client profiles, and design timely and personalized client outreach programs with Actionable Segmentation.

### [Marketing Cloud Engagement for Financial Services Cloud](#)

Use Marketing Cloud Engagement for Industries to its fullest potential and synchronize your Financial Services Cloud CRM data with Marketing Cloud.

### [Complaint Management](#)

With Complaint Management, you can offer your users an effective process for handling customer complaints. Your users can quickly submit, monitor, and analyze customer complaints. Financial institutions can boost agent productivity, enhance customer satisfaction, and reduce regulatory and operational costs.

### [Actionable Relationship Center](#)

Enhancements to the ARC graph give your users the ability to zoom in and out, show or hide card fields, and identify cards with child cards.

### [Service Process Automation](#)

Learn about the changes to Service Process Studio and enhance customer experience with self-service processes for address update and fee reversal.

### [Discovery Framework Enhancements](#)

Now you can edit a signature before submitting the assessment form. Guest users can access OmniScripts of the Discovery Framework type on Experience Cloud sites. Read about these enhancements and more.

### [Revenue Management for Financial Services Cloud](#)

Set up Revenue Management for Financial Services Cloud easily by using the setup flow. Expedite the creation of the CRM Analytics app for revenue management.

### [Scoring Framework for Financial Services Cloud](#)

Use Scoring Framework to easily and quickly build and deploy propensity machine learning models with clicks instead of code. Show the predictions from these models on actionable lists and engage salespersons with these customers to increase your revenue.

### [Action Plans for Financial Services Cloud](#)

Design and run complex business processes by using the increased task dependency limit in action plan templates. An action plan template can now have a maximum of 24 task dependencies in a sequence.

### [Record Alerts](#)

Check out the enhancements to Record Alerts.

### [Branch Management](#)

The Branch Console app gives users quick access to branch management features in one place.

### [New and Changed Financial Services Cloud Object Fields](#)

Do more with new and updated Financial Services Cloud objects.

### [New Tooling Objects in Financial Service Cloud](#)

Make the most of the new Tooling objects of Financial Service Cloud.

### [New Financial Services Cloud Metadata Type](#)

Make the most of the new metadata type of Financial Services Cloud.

## Financial Services Cloud Guide Changes

The Financial Services Cloud Installation Guide is now in Salesforce Help. The Quick Start Guide content has merged into the Admin Guide. The Upgrade Guide is retired.

### IN THIS SECTION:

#### [Financial Services Cloud Installation, Quick Start, and Update Guides](#)

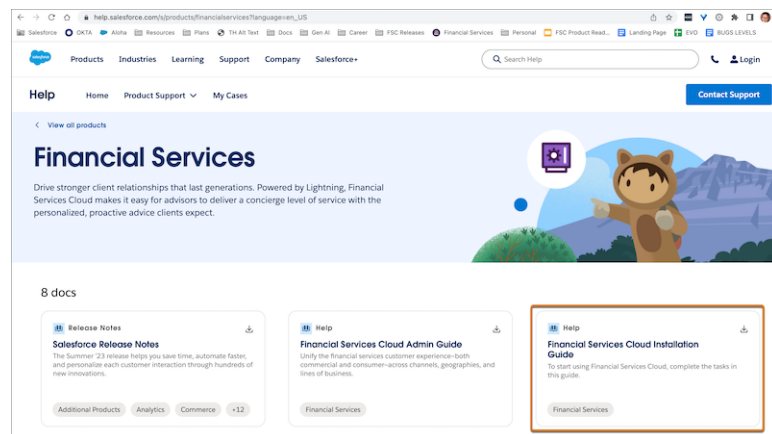
The Financial Services Cloud Installation Guide has found a new home in Salesforce Help. Previously, the Financial Services Cloud Installation Guide was published to [developer.salesforce.com/docs](https://developer.salesforce.com/docs). The Quick Start Guide is now part of the Plan and Prepare section of the Admin Guide. The Upgrade Guide is retired.

## Financial Services Cloud Installation, Quick Start, and Update Guides

The Financial Services Cloud Installation Guide has found a new home in Salesforce Help. Previously, the Financial Services Cloud Installation Guide was published to [developer.salesforce.com/docs](https://developer.salesforce.com/docs). The Quick Start Guide is now part of the Plan and Prepare section of the Admin Guide. The Upgrade Guide is retired.

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

**How:** Navigate to Salesforce Help ([help.salesforce.com](https://help.salesforce.com)) and click **View all products**. Then click the product tile for Financial Services and look for the Financial Services Cloud Installation Guide.



### SEE ALSO:

[Financial Services Cloud Installation Guide](#)

[Prepare to Use Financial Services Cloud](#)

## Financial Services Cloud Admin Guide

The Financial Services Cloud Admin Guide is now in Salesforce Help.

### IN THIS SECTION:

#### [Find the Financial Services Cloud Admin Guide in Salesforce Help](#)

The Financial Services Cloud Admin Guide has found a new home in Salesforce Help. Previously, the Financial Services Cloud Admin Guide was published to [developer.salesforce.com/docs](https://developer.salesforce.com/docs).



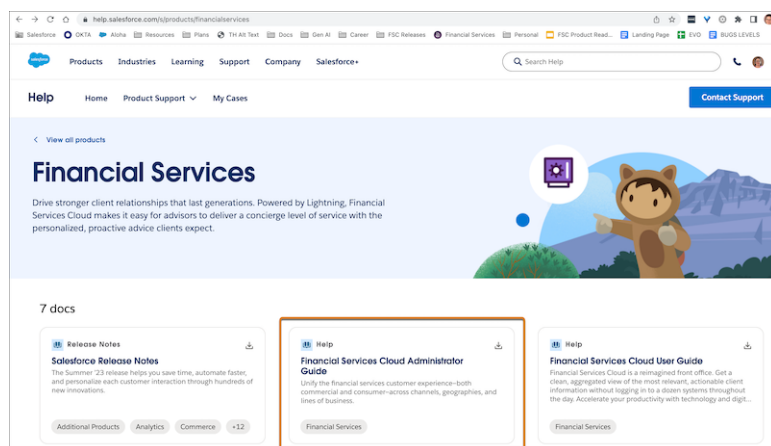
## Find the Financial Services Cloud Admin Guide in Salesforce Help

The Financial Services Cloud Admin Guide has found a new home in Salesforce Help. Previously, the Financial Services Cloud Admin Guide was published to [developer.salesforce.com/docs](https://developer.salesforce.com/docs).

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

**Why:** In Salesforce Help, the Financial Services Cloud Admin Guide is located with other relevant content such as the Industries Common Features Guide, where many essential features are documented, including Action Plans, Discovery Framework, Record Alerts, and Actionable Segmentation.

**How:** Navigate to Salesforce Help ([help.salesforce.com](https://help.salesforce.com)) and click **View all products**. Then click the product tile for Financial Services and look for the Financial Services Cloud Admin Guide.



SEE ALSO:

[Financial Services Cloud Admin Guide](#)

## Actionable Segmentation (Generally Available)

Segment and curate similar client profiles, and design timely and personalized client outreach programs with Actionable Segmentation.

IN THIS SECTION:

[Actionable Segmentation Enhancements](#)

To ensure a smooth actionable list creation experience, monitor the Queries for DataPipelines API call usage and Query for Datapipelines User license validity on the Actionable Segmentation Settings page. Help your users save time when creating actionable lists. As a list creator, you can select and add up to 10,000 dataset records to an actionable list by using the bulk select option, and also use a custom filter logic to filter these records. Users can now share actionable lists with other Salesforce users.

[Outreach List](#)

Sales and service agents can now search for and select an actionable list to view the associated prospects, including existing customers. Actionable lists are grouped by priority. Agents can now see the assigned prospects in accordion view. The field and value used to sort the prospects are also shown to agents, and prospects are grouped by their engagement status. In addition, agents can update the engagement status of prospects and call prospects.

### [Actionable List Members](#)

Large actionable lists are now configured asynchronously. List creators can update the engagement status of prospects, including existing customers. In addition, list creators can perform bulk actions on prospect records and configure the sort field and the order in which prospects are sorted in the Outreach List component.

## Actionable Segmentation Enhancements

To ensure a smooth actionable list creation experience, monitor the Queries for DataPipelines API call usage and Query for Datapipelines User license validity on the Actionable Segmentation Settings page. Help your users save time when creating actionable lists. As a list creator, you can select and add up to 10,000 dataset records to an actionable list by using the bulk select option, and also use a custom filter logic to filter these records. Users can now share actionable lists with other Salesforce users.

**Where:** This feature is available in Lightning Experience in Enterprise and Unlimited editions.

**Who:** To use this feature, users need the Actionable Segmentation permission set and the Query for Datapipelines User permission set.

SEE ALSO:

[Actionable Segmentation \(can be outdated or unavailable during release preview\)](#)

## Outreach List

Sales and service agents can now search for and select an actionable list to view the associated prospects, including existing customers. Actionable lists are grouped by priority. Agents can now see the assigned prospects in accordion view. The field and value used to sort the prospects are also shown to agents, and prospects are grouped by their engagement status. In addition, agents can update the engagement status of prospects and call prospects.

SEE ALSO:

[Outreach List \(can be outdated or unavailable during release preview\)](#)

## Actionable List Members

Large actionable lists are now configured asynchronously. List creators can update the engagement status of prospects, including existing customers. In addition, list creators can perform bulk actions on prospect records and configure the sort field and the order in which prospects are sorted in the Outreach List component.

SEE ALSO:

[Actionable List Members \(can be outdated or unavailable during release preview\)](#)

## Marketing Cloud Engagement for Financial Services Cloud

Use Marketing Cloud Engagement for Industries to its fullest potential and synchronize your Financial Services Cloud CRM data with Marketing Cloud.

IN THIS SECTION:

[Send Customized Emails Using Marketing Cloud](#)

Create and send emails using Marketing Cloud Engagement for Financial Services Cloud. Use the customizable email templates to save time and send personalized emails to your clients. Synchronize your Salesforce data with Marketing Cloud so that you always have the most up-to-date client information in your emails.

## Send Customized Emails Using Marketing Cloud

Create and send emails using Marketing Cloud Engagement for Financial Services Cloud. Use the customizable email templates to save time and send personalized emails to your clients. Synchronize your Salesforce data with Marketing Cloud so that you always have the most up-to-date client information in your emails.

**Where:** This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions provisioned with the MC Engagement for Industries add-on license where Financial Services Cloud is enabled.

**Who:** Users need the Financial Services Cloud Extension permission set to use this feature.

**Why:** Marketing Cloud Engagement for Financial Services Cloud provides email templates to help you efficiently set up your bank's email campaigns. For example, create email templates that promote services available at your bank to new clients. In one template, describe financial support services. In another, encourage clients to register for mobile or digital banking.

**How:** Set up My Domain and install the Marketing Cloud Engagement for Industries package in Salesforce. Then connect Marketing Cloud with Salesforce and create a synchronized data source. Customize the email templates and choose the audience to send your emails to.

### SEE ALSO:

[Marketing Cloud Engagement for Financial Services \(can be outdated or unavailable during release preview\)](#)

## Complaint Management

With Complaint Management, you can offer your users an effective process for handling customer complaints. Your users can quickly submit, monitor, and analyze customer complaints. Financial institutions can boost agent productivity, enhance customer satisfaction, and reduce regulatory and operational costs.

### IN THIS SECTION:

#### [Streamline the Complaint Intake Process with Complaint Management](#)

Enable your agents to quickly capture customer complaints through an easy-to-use complaint intake OmniScript. Using the OmniScript, you can review existing complaints, authorize the complainant, gather complaint details, and submit a new complaint. Customize the OmniScript to meet your business needs.

#### [Enable Your Customer Community Users to File Complaints on Financial Services Client Portal](#)

Offer a self-guided complaint intake experience for your customers by configuring a Financial Services Client Portal community. Enable the prebuilt complaint intake OmniScript in the portal to launch the complaint intake process.

#### [Provide Better Customer Experience by Analyzing Customer Complaints](#)

Get a comprehensive analysis of your customer complaints by using the Analytics for Complaints Management dashboard. Obtain quick insights into the volume of complaints, trends, complaint resolution progress, and teams' workload. Analyze complaints based on channels, subtypes, customers, and representatives and make informed decisions on improving the processes for complaint resolution.

#### [Changed Objects](#)

The standard fields extend the PublicComplaint and CaseParticipant objects for Complaint Management use cases.

#### [Connect REST APIs](#)

Connect REST APIs help customers, partners, and ISVs integrate with Salesforce software and UIs.

#### [Apex: New and Changed Items in Financial Services Cloud](#)

These classes and methods are new.

## Streamline the Complaint Intake Process with Complaint Management

Enable your agents to quickly capture customer complaints through an easy-to-use complaint intake OmniScript. Using the OmniScript, you can review existing complaints, authorize the complainant, gather complaint details, and submit a new complaint. Customize the OmniScript to meet your business needs.

**Where:** This feature is available in Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

**Who:** To use this feature, users need OmniStudio User and Financial Services Cloud Basic, or Financial Services Cloud Standard, or Financial Services Cloud Extension permission sets.

**Why:** Monitor your entire complaint management workflow. For every complaint that's submitted, the Complaint Management connect API creates a case record, a public complaint record, and case participant records. Go to these records to view complaint and complainant details. Based on the values of public complaint fields, you can configure case assignment rules to automatically route complaints to a queue or to the right people in the team. You can also enable CRM Analytics and create a CRM app for Complaint Management. By using the app, your customer experience managers and complaint team managers can visualize prebuilt dashboards. These dashboards provide valuable insights on complaints volume, trends, root causes, and products or services that receive a high number of complaints.

**How:** To start with the complaint intake process, go to the person account record. In the Action Launcher component, search for Manage Complaints and then click **Manage Complaints**.

SEE ALSO:

[Set Up Complaint Management \(can be outdated or unavailable during release preview\)](#)

[Provide Better Customer Experience by Analyzing Customer Complaints \(can be outdated or unavailable during release preview\)](#)

## Enable Your Customer Community Users to File Complaints on Financial Services Client Portal

Offer a self-guided complaint intake experience for your customers by configuring a Financial Services Client Portal community. Enable the prebuilt complaint intake OmniScript in the portal to launch the complaint intake process.

**Where:** This feature is available in Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

**How:** From Setup, enter *Digital Experiences* in the Quick Find box, then select All **Sites**. Click **Builder** to work with your Financial Services Client Portal site. Edit the portal home page and add the **FSCComplaint/Intake** OmniScript.

SEE ALSO:

[Enable Complaint Intake Process in a Self-Service Portal \(can be outdated or unavailable during release preview\)](#)

## Provide Better Customer Experience by Analyzing Customer Complaints

Get a comprehensive analysis of your customer complaints by using the Analytics for Complaints Management dashboard. Obtain quick insights into the volume of complaints, trends, complaint resolution progress, and teams' workload. Analyze complaints based on channels, subtypes, customers, and representatives and make informed decisions on improving the processes for complaint resolution.

**Where:** This feature is available in CRM Analytics in Lightning Experience where Financial Services Cloud is enabled. CRM Analytics is available for an extra cost in Performance, Enterprise, and Unlimited editions.

**Who:** To create, edit, and view the Analytics for Complaint Management dashboard, you need the RI for Fins Admin permission set.

**How:** From Setup, in the Quick Find box, enter *Complaint Management*, and then select **Complaint Management**. Follow the instructions on the page to set up Analytics for Complaint Management.

## Changed Objects

The standard fields extend the `PublicComplaint` and `CaseParticipant` objects for Complaint Management use cases.

### Store the product type for which the complaint is created

Use the new `ProductType` field on the `PublicComplaint` object.

### View the complaint date

Use the new `ReceivedDate` field on the `PublicComplaint` object.

### Know the complainant authorization status

Use the new `IsComplainantAuthorized` field on the `PublicComplaint` object.

### Store the complaint source

Use the new `SourceType` field on the `PublicComplaint` object.

### Store the complaint's escalation cause

Use the new `EscalationCause` field on the `PublicComplaint` object.

### Specify the complaint inclusion status in regulatory report

Use the new `ShouldInclInRegulatoryRpt` field on the `PublicComplaint` object.

### Know the cause of the complaint

Use the new `CauseType` and `CauseSubtype` fields on the `PublicComplaint` object.

### View the compensation amount

Use the new `CompensationAmount` field on the `PublicComplaint` object.

### Know the preferred start and end time to call the customer

Use the new `PreferredCallTimeFrom` and `PreferredCallTimeTo` fields on the `CaseParticipant` object.

### Store the preferred communication mode

Use the new `PreferredCommunicationMode` field on the `CaseParticipant` object.

### Store the authorization proof

Use the new `AuthorizationProof` field on the `CaseParticipant` object.

## Connect REST APIs

Connect REST APIs help customers, partners, and ISVs integrate with Salesforce software and UIs.

### Create a customer complaint

Make a POST request to the new `/connect/service-excellence/public-complaint` resource.

New request body: Complaint Management Request Input

New response body: Complaint Management Output

SEE ALSO:

[Financial Services Cloud Developer Guide: Create Public Complaint](#)

## Apex: New and Changed Items in Financial Services Cloud

These classes and methods are new.

**IN THIS SECTION:**[ConnectApi Namespace](#)

These classes and methods are new.

**ConnectApi Namespace**

These classes and methods are new.

**ConnectApi Namespace**

This new method is in the `ConnectApi.IComplaintMgmtConnectFamily` class.

**Create a public complaint using a request body**

```
createComplaint(complaintMgmtRequestData)
```

New input class—`ConnectApi.ComplaintMgmtRequestInputRepresentation`

New output class—`ConnectApi.ComplaintMgmtOutputRepresentation`

**SEE ALSO:**

[Financial Services Cloud Apex Developer Guide: Create Public Complaint](#)

**Actionable Relationship Center**

Enhancements to the ARC graph give your users the ability to zoom in and out, show or hide card fields, and identify cards with child cards.

**IN THIS SECTION:**[View an ARC Graph by Zooming](#)

Your users can now focus on the most relevant information in an ARC graph using the enhanced zoom in and zoom out feature. Now you can zoom in to a maximum of 160%. To ensure users can read the text on each ARC graph card, the zoom out maximum is 40%. When your users are ready to see the original ARC graph view, the Reset Zoom and Center Graph buttons return the ARC graph to the original zoom and position.

[Hide Card Fields on an ARC Graph](#)

Your users can now get a birds-eye view of their ARC graph by hiding the fields on cards. A new toggle gives your users the flexibility to hide fields on ARC graph cards to show only the record name on the card to get a high-level view of their client's relationships.

[Identify Cards with Child Cards Faster](#)

The hierarchy icon now shows on ARC graph cards anytime a card has child records associated with it. Previously, your users had to click each card on an ARC graph to see if it had child records. The hierarchy icon is a quick way for your users to know if there are child records on an ARC graph card.

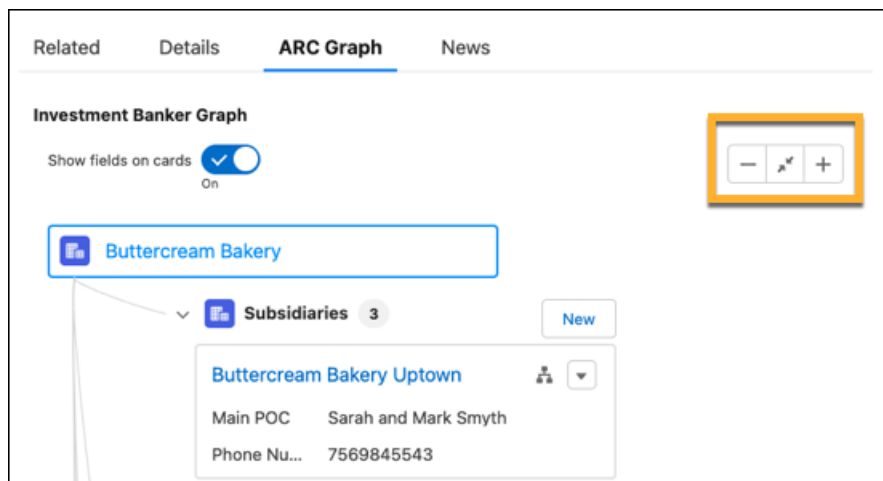
**View an ARC Graph by Zooming**

Your users can now focus on the most relevant information in an ARC graph using the enhanced zoom in and zoom out feature. Now you can zoom in to a maximum of 160%. To ensure users can read the text on each ARC graph card, the zoom out maximum is 40%. When your users are ready to see the original ARC graph view, the Reset Zoom and Center Graph buttons return the ARC graph to the original zoom and position.

**Where:** This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

**Who:** Users need the Financial Services Cloud Extension permission set to use this feature.

**How:** Click the Zoom In and Zoom Out buttons to customize the view of your client's relationships. Center Graph lets you recenter the ARC graph back to the original position.



SEE ALSO:

[Explore an ARC Relationship Graph \(can be outdated or unavailable during release preview\)](#)

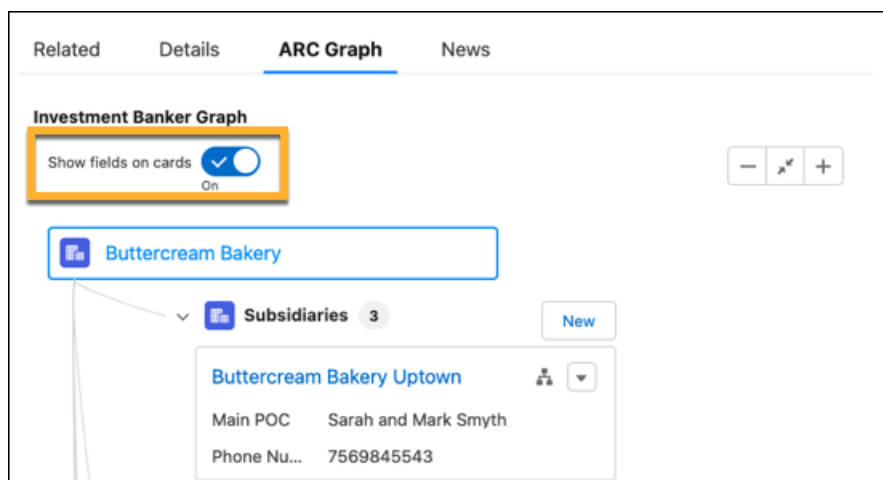
## Hide Card Fields on an ARC Graph

Your users can now get a birds-eye view of their ARC graph by hiding the fields on cards. A new toggle gives your users the flexibility to hide fields on ARC graph cards to show only the record name on the card to get a high-level view of their client's relationships.

**Where:** This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

**Who:** Users need the Financial Services Cloud Extension permission set to use this feature.

**How:** **Show card fields** is turned on by default. Turn the toggle off to hide fields on the cards. The width of cards is reduced to 75% of the original width, allowing for more cards to be viewed on the screen.



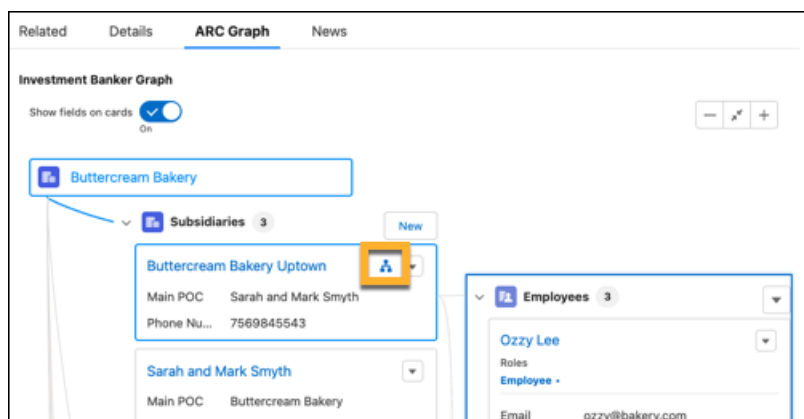
## Identify Cards with Child Cards Faster

The hierarchy icon now shows on ARC graph cards anytime a card has child records associated with it. Previously, your users had to click each card on an ARC graph to see if it had child records. The hierarchy icon is a quick way for your users to know if there are child records on an ARC graph card.

**Where:** This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

**Who:** Users need the Financial Services Cloud Extension permission set to use this feature.

**How:** On an ARC graph, locate the cards that show the hierarchy icon, then click the card to show child records.



## Service Process Automation

Learn about the changes to Service Process Studio and enhance customer experience with self-service processes for address update and fee reversal.

### IN THIS SECTION:

#### [Service Process Studio for Financial Services Cloud](#)

Now your users can clone service process definitions, group the related data attributes, add look-up type data attributes, and view all data attributes on the Case Details component.



### [Service Processes for Self-Service](#)

Learn about the address update and fee reversal service processes that are now available as self-service processes for your customers.

## Service Process Studio for Financial Services Cloud

Now your users can clone service process definitions, group the related data attributes, add look-up type data attributes, and view all data attributes on the Case Details component.

**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 Industry Service Excellence permission set.

SEE ALSO:

[Service Process Studio \(can be outdated or unavailable during release preview\)](#)

## Service Processes for Self-Service

Learn about the address update and fee reversal service processes that are now available as self-service processes for your customers.

IN THIS SECTION:

### [Enable Your Customer Community Users to Update Their Addresses on Financial Services Client Portal](#)

Offer a self-guided address update experience for your customers by configuring a Financial Services Client Portal community. Enable the prebuilt address update OmniScript in the portal for your customers to quickly launch the address update process.

### [Enable Your Customer Community Users to Reverse Their Fees on Financial Services Client Portal](#)

Offer a self-guided fee reversal experience for your customers by configuring a Financial Services Client Portal community. Enable the prebuilt fee reversal OmniScript in the portal for your customers to quickly launch the fee reversal process.

## Enable Your Customer Community Users to Update Their Addresses on Financial Services Client Portal

Offer a self-guided address update experience for your customers by configuring a Financial Services Client Portal community. Enable the prebuilt address update OmniScript in the portal for your customers to quickly launch the address update process.

**Where:** This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

**How:** From Setup, enter Digital Experiences in the Quick Find box, then select All **Sites**. Click **Builder** to work with your Financial Services Client Portal site. Edit the portal home page and add the **FSCAddressUpdate/CreateRequest** OmniScript.

SEE ALSO:

[Set Up Address Update Service Process on Financial Services Client Portal \(can be outdated or unavailable during release preview\)](#)

## Enable Your Customer Community Users to Reverse Their Fees on Financial Services Client Portal

Offer a self-guided fee reversal experience for your customers by configuring a Financial Services Client Portal community. Enable the prebuilt fee reversal OmniScript in the portal for your customers to quickly launch the fee reversal process.

**Where:** This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

**How:** From Setup, enter Digital Experiences in the Quick Find box, then select **All Sites**. Click **Builder** to work with your Financial Services Client Portal site. Edit the portal home page and add the **FSC/FeeReversal** OmniScript.

SEE ALSO:

[Set Up Fee Reversal Service Process on Financial Services Client Portal \(can be outdated or unavailable during release preview\)](#)

## Discovery Framework Enhancements

Now you can edit a signature before submitting the assessment form. Guest users can access OmniScripts of the Discovery Framework type on Experience Cloud sites. Read about these enhancements and more.

IN THIS SECTION:

[More Support for Discovery Framework](#)

The Discovery Framework feature is now available to users who have the Financial Services Cloud - Starter license. Previously, this feature was available only to users who had the Financial Services Cloud - Growth license.

SEE ALSO:

[Discovery Framework Enhancements \(can be outdated or unavailable during release preview\)](#)

## More Support for Discovery Framework

The Discovery Framework feature is now available to users who have the Financial Services Cloud - Starter license. Previously, this feature was available only to users who had the Financial Services Cloud - Growth license.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions where Financial Services Cloud is enabled.

## Revenue Management for Financial Services Cloud

Set up Revenue Management for Financial Services Cloud easily by using the setup flow. Expedite the creation of the CRM Analytics app for revenue management.

IN THIS SECTION:

[Set Up Revenue Management for Financial Services Cloud More Easily](#)

Initiate the request to create a CRM Analytics app for Revenue Management more easily by using the new setup flow for Revenue Management for Financial Services Cloud. Follow the steps to configure the objects and fields that track revenue performance and create an app with dashboards for the configuration. Your business users can get valuable insights on revenue by viewing the prebuilt dashboards in the app.

[Manage Your Revenue and Team Better](#)

The Revenue Management for Financial Services Cloud app now features components to review the leads and accounts based on contact schedules. Check the Revenue Forecast component to understand better the potential range of outcomes and the associated level of risk. Managers can use the Team Ranking and Leaderboard component to ascertain the KPI rank of selected representatives and ensure even distribution of work and equal opportunities to team members.

## Set Up Revenue Management for Financial Services Cloud More Easily

Initiate the request to create a CRM Analytics app for Revenue Management more easily by using the new setup flow for Revenue Management for Financial Services Cloud. Follow the steps to configure the objects and fields that track revenue performance and create an app with dashboards for the configuration. Your business users can get valuable insights on revenue by viewing the prebuilt dashboards in the app.

**Where:** This feature is available in Lightning Experience in Enterprise and Unlimited editions where Financial Services Cloud is enabled.

**Why:** Get step-by-step guidance for completing the preliminary steps, configuring the objects and fields that store revenue and product information, and creating categories for the revenue metric to measure and track.

**How:** From Setup, in the Quick Find box, enter *Revenue Management Setup*, and then select **Revenue Management Setup**. Complete the prerequisites to set up Revenue Management for Financial Services Cloud, if not already completed. Then follow the instructions on the page to set up Revenue Management and initiate the request to create an app.

SEE ALSO:

[Set Up Revenue Management for Financial Services Cloud \(can be outdated or unavailable during release preview\)](#)

## Manage Your Revenue and Team Better

The Revenue Management for Financial Services Cloud app now features components to review the leads and accounts based on contact schedules. Check the Revenue Forecast component to understand better the potential range of outcomes and the associated level of risk. Managers can use the Team Ranking and Leaderboard component to ascertain the KPI rank of selected representatives and ensure even distribution of work and equal opportunities to team members.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions where Financial Services Cloud and CRM Analytics are enabled.

**Who:** To create and edit the Revenue Management for Financial Services Cloud dashboard, you need the RI for Fins Admin permission set. To view the Revenue Intelligence for Financial Services app, you need the RI for Fins User permission set.

**How:** From Setup, in the Quick Find box, enter *Revenue Management Setup*, and select **Revenue Management Setup**. Then, follow the instructions on the page.

## Scoring Framework for Financial Services Cloud

Use Scoring Framework to easily and quickly build and deploy propensity machine learning models with clicks instead of code. Show the predictions from these models on actionable lists and engage salespersons with these customers to increase your revenue.

IN THIS SECTION:

[Optimize Your Revenue by Using Scoring Framework](#)

Pitch the right products to customers by analyzing their propensity to purchase financial assets and boost your revenue. Decrease customer attrition by taking steps based on the customer's likelihood to churn. Sell an asset to an interested customer based on predictions and increase your assets under management. Get prediction scores based on data of your accounts and contacts by defining your own target variable.

[Engage with the Right Customers by Showing Predictions on Actionable Lists](#)

Create an actionable list of customers to prioritize and show relevant predictions that Scoring Framework generated on the list so that you can focus on the right customers. For example, create an actionable list of customers who are predicted to buy products and show the customers' likelihood of buying the products. Pitch to your customers the products that they are most likely to buy and boost your revenue.

## Optimize Your Revenue by Using Scoring Framework

Pitch the right products to customers by analyzing their propensity to purchase financial assets and boost your revenue. Decrease customer attrition by taking steps based on the customer's likelihood to churn. Sell an asset to an interested customer based on predictions and increase your assets under management. Get prediction scores based on data of your accounts and contacts by defining your own target variable.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions where Financial Services Cloud, CRM Analytics for Financial Services Cloud, AI Accelerator, and Scoring Framework are enabled.

**Who:** The Prediction Scores for Accounts or Contacts (Financial Services Cloud) and Prediction Scores (Financial Services Cloud) template configuration types in Scoring Framework are available to users with the Revenue Intelligence for Financial Services license.

**How:** On the new Scoring Framework page in Setup, create a CRM Analytics template configuration.

- To get predictions about customers who are likely to churn, purchase products, or add more assets, select **Prediction Scores (Financial Services Cloud)** as the template configuration type.
- To get predictions based on your account or contact data, select **Prediction Scores for Accounts or Contacts (Financial Services Cloud)** as the template configuration type and define a custom target variable.

SEE ALSO:

[Scoring Framework \(Generally Available\)](#)

[Financial Services Cloud Administrator Guide: Scoring Framework Predictions \(can be outdated or unavailable during release preview\)](#)

## Engage with the Right Customers by Showing Predictions on Actionable Lists

Create an actionable list of customers to prioritize and show relevant predictions that Scoring Framework generated on the list so that you can focus on the right customers. For example, create an actionable list of customers who are predicted to buy products and show the customers' likelihood of buying the products. Pitch to your customers the products that they are most likely to buy and boost your revenue.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions where Financial Services Cloud, CRM Analytics for Financial Services Cloud, AI Accelerator, Scoring Framework, and Actionable Segmentation are enabled.

**Who:** Users with the Revenue Intelligence for Financial Services license, the Industry Sales Excellence add-on license with the Actionable Segmentation permission set, and the Financial Services Cloud Growth license can use Scoring Framework and Actionable Segmentation.

SEE ALSO:

[Financial Services Cloud Administrator Guide: Scoring Framework Predictions on Actionable Lists \(can be outdated or unavailable during release preview\)](#)

## Action Plans for Financial Services Cloud

Design and run complex business processes by using the increased task dependency limit in action plan templates. An action plan template can now have a maximum of 24 task dependencies in a sequence.

**Where:** This change applies to Lightning Experience in Professional, Enterprise, and Unlimited Editions where Financial Services Cloud is enabled.

SEE ALSO:

[Action Plans \(can be outdated or unavailable during release preview\)](#)

## Record Alerts

Check out the enhancements to Record Alerts.

### IN THIS SECTION:

#### [Record Alerts](#)

Provide access to record alerts. Refine record alerts by using Business Rules Engine. Show alerts from your external systems using Data Consumption Framework.

## Record Alerts

Provide access to record alerts. Refine record alerts by using Business Rules Engine. Show alerts from your external systems using Data Consumption Framework.

**Where:** This change applies to Lightning Experience in clouds where Record Alerts is available.

### SEE ALSO:

#### [Record Alerts](#)

## Branch Management

The Branch Console app gives users quick access to branch management features in one place.

### IN THIS SECTION:

#### [Add Bankers to Branches](#)

Create a banker and branch assignment in a single step. When you add a banker directly to a branch, we create the required Branch Unit Business Member for you automatically.

## Add Bankers to Branches

Create a banker and branch assignment in a single step. When you add a banker directly to a branch, we create the required Branch Unit Business Member for you automatically.

**Where:** This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

**Who:** Users need the Financial Services Cloud Extension permission set to use this feature.

**How:** Make sure your Banker record page layout includes Current Branch Start Date and Current Branch fields. Then, on the Bankers tab or the Bankers related list of a Branch Unit record, click **New**. Specify a branch in the Current Branch field.

### SEE ALSO:

[Financial Services Cloud Administrator Guide: Create Banker Records \(can be outdated or unavailable during release preview\)](#)

## New and Changed Financial Services Cloud Object Fields

Do more with new and updated Financial Services Cloud objects.

### Get an expanded view of hierarchical client relationships

The `AccountAccountRelation` object now supports `AssociationType`, a list of values that show the relationship of accounts in the Relationship Map.

### New Fields on Party Profile

Use the new `PrimaryIdentifier` field to specify the unique identifier for the party.

Use the new `Stage` field to view the current stage of the party profile.

Use the new `TaxpayerIdentificationType` field to specify the type of taxpayer identification used for tax purposes.

Use the new `TaxpayerIdentificationNumber` field to specify the taxpayer identifier that's used for tax purposes.

### New Fields on Party Profile Address

Use the new `PrimaryAddress` field to indicate whether the party's address is the primary address.

Use the new `ValidityStartDate` field to specify the date when the party profile address becomes valid.

Use the new `ValidityEndDate` field to specify the date until when the party profile address is valid.

### New Fields on Party Identity Verification

Use the new `ThirdPartyVerificationProcessURL` field to store the third-party URL to view details of the verification run on the party profile.

Use the new `ThirdPartyVerificationProcessID` field to store the third-party URL to view details of the verification run on the party profile.

### New Fields on Party Screening Summary

Use the new `ThirdPartyScreeningResult` field to store the raw JSON or XML payload from the third-party screening system.

### New Fields on Group Census Member

Use the new `PolicyStartDate` field to specify the policy's start date.

### New Fields on Group Census Member Plan

Use the new `OwnerId` field to store the owner associated with the group census member plan.

### New Fields on Insurance Policy

Use the new `EmployerContribution` field to determine the contribution of employer towards the insurance premium.

Use the new `IsPolicyEditLocked` field to identify whether the policy record is locked by the application.

Use the new `RatingDate` field to determine the rating details on a mid-term adjustment, endorsement, or out-of-sequence endorsement to a policy.

## New Fields on Insurance Policy Asset

Use the new `AssetCode` field to store the unique code of the insurance policy asset across all the policy versions.

## New Fields on Insurance Policy Coverage

Use the new `ContractGroupPlanId` field to associate the contract group plan with the insurance policy coverage.

Use the new `CoverageCode` field to store the unique code of the insurance policy coverage across all the policy versions.

## New Fields on Insurance Policy Participant

Use the new `ParticipantCode` field to store the unique code of the insurance policy participant across all the policy versions.

## New Tooling Objects in Financial Service Cloud

Make the most of the new Tooling objects of Financial Service Cloud.

### Track Revenue Data Source-related stage information and revenue metrics.

Use the new `RevenueSourceCategoryConfig` Tooling object.

### Set up Revenue Source object and field from Opportunity and Product Object information.

Use the new `RevenueSourceObjectConfig` Tooling object.

## New Financial Services Cloud Metadata Type

Make the most of the new metadata type of Financial Services Cloud.

## Settings

### Configure the settings for Insurance Claim Financial Services

Use the new `ClaimFinancialSettings` metadata type. Introduced in API version 57.0, this type has been added to the *Financial Services Cloud Developer Guide*.

## Grantmaking

Discover Grantmaking! Available in Public Sector Solutions or as a standalone product that includes Nonprofit Cloud, manage the whole lifecycle of the grants you award. Add details about the funding opportunities people or organizations can apply for. Provide an easy way to enter details of a budget down to the values for each category and period. Capture all the information related to a grant application. Track the applicant's requirements after a grant is awarded. Provide a Grantmaking Experience Cloud site for your applicants, grantees, and external reviewers to enter details directly in your grant records.

### IN THIS SECTION:

#### [Get Familiar with the New Grantmaking Settings and Permissions](#)

Find the new Grantmaking settings to turn on the feature. If you're managing your permissions outside of the Grantmaking permission sets, take note of the updated Grantmaking system permissions names.

#### [Capture Details About Grant Opportunities](#)

Use Funding Opportunities to capture details about the grants you offer. You can include your funding opportunities in your Experience Cloud site. Your site can include descriptions of the grants, application instructions, and details about when the opportunities start and stop. In addition, set up a budget template for applicants to use and a timeline for applicants to track important dates.

### [Manage and Review Budgets](#)

Applicants can enter and submit budget details for each category and period of a grant cycle. Reviewers can see details of a budget directly on a grant application record. And internal users can enter details directly on the budget record.

### [Manage and Review Grant Applications](#)

Use Experience Cloud to receive grant applications in Salesforce. Use powerful automation tools such as OmniStudio, Flow Builder, and Approval Processes to quickly complete applications and reviews.

### [Manage the Lifecycle of an Awarded Grant](#)

Track and manage a funding award, the applicant's reporting requirements, the documents the applicant must provide, and amendments to the awarded grant. Share the funding award details with the applicant through Experience Cloud. Encourage applicants to complete requirements online and see the information on their record in Salesforce.

### [Add Salesforce Approval Processes for Submitted Grantmaking Records](#)

Set up approval processes to work with any Grantmaking object that can be submitted, including budgets, individual applications, funding award requirements, and funding award amendments.

### [Make Applying for Grants Easy by Creating an Experience Cloud Site](#)

Use the Grantmaking template for Experience Cloud to create an external site for your applicants, grantees, and grant reviewers.

### [New Objects and Fields in Grantmaking](#)

Do more with the new and updated Grantmaking objects.

### [New Grantmaking Metadata Type](#)

Use the new Budget component in Experience Cloud, Lightning record pages, and Flow Builder.

## Get Familiar with the New Grantmaking Settings and Permissions

Find the new Grantmaking settings to turn on the feature. If you're managing your permissions outside of the Grantmaking permission sets, take note of the updated Grantmaking system permissions names.

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

**How:** To turn on Grantmaking, from Setup, in the Quick Find box, enter *Grantmaking*, and then select **Grantmaking Settings**.

If you use Grantmaking in Public Sector Solutions without the managed permission sets that are included in Grantmaking, assign these system permissions to your users:

- Manage Applications
- Manage Budgets
- Manage Funding Awards
- Use Grantmaking

SEE ALSO:

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

## Capture Details About Grant Opportunities

Use Funding Opportunities to capture details about the grants you offer. You can include your funding opportunities in your Experience Cloud site. Your site can include descriptions of the grants, application instructions, and details about when the opportunities start and stop. In addition, set up a budget template for applicants to use and a timeline for applicants to track important dates.



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

**Who:** Users with the Grantmaking Manager permission set can create and update funding opportunities. Users with the Experience Cloud for Grantmaking permission set can view funding opportunities.

SEE ALSO:

[Salesforce Help: Manage Funding Opportunities for Grantmaking \(can be outdated or unavailable during release preview\)](#)

## Manage and Review Budgets

Applicants can enter and submit budget details for each category and period of a grant cycle. Reviewers can see details of a budget directly on a grant application record. And internal users can enter details directly on the budget record.

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

**Who:** Users with the Grantmaking Manager or Experience Cloud for Grantmaking permission set can create and update budgets.

SEE ALSO:

[Salesforce Help: Add the Budget Component to the Budget Page Layout \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Add Grantmaking Components and Fields to the Individual Application Page Layout \(can be outdated or unavailable during release preview\)](#)

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

## Manage and Review Grant Applications

Use Experience Cloud to receive grant applications in Salesforce. Use powerful automation tools such as OmniStudio, Flow Builder, and Approval Processes to quickly complete applications and reviews.

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

**Who:** Users with the Grantmaking Manager permission set can create and update applications and reviews. Users with the Experience Cloud for Grantmaking permission set can create applications.

SEE ALSO:

[Salesforce Help: Use Automation for Grantmaking \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Review and Manage Grant Applications \(can be outdated or unavailable during release preview\)](#)

## Manage the Lifecycle of an Awarded Grant

Track and manage a funding award, the applicant's reporting requirements, the documents the applicant must provide, and amendments to the awarded grant. Share the funding award details with the applicant through Experience Cloud. Encourage applicants to complete requirements online and see the information on their record in Salesforce.

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

**Who:** Users with the Grantmaking Manager permission set can create and update funding awards, funding disbursements, funding award requirements, and funding award amendments. Users with the Experience Cloud for Grantmaking permission set can view funding awards and funding disbursements, edit funding award requirements, and create and edit funding award amendments.

SEE ALSO:

[Salesforce Help: Manage Funding Awards with Grantmaking \(can be outdated or unavailable during release preview\)](#)

## Add Salesforce Approval Processes for Submitted Grantmaking Records

Set up approval processes to work with any Grantmaking object that can be submitted, including budgets, individual applications, funding award requirements, and funding award amendments.

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

**Who:** Users with the Grantmaking Manager permission set can create approval processes.

SEE ALSO:

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

## Make Applying for Grants Easy by Creating an Experience Cloud Site

Use the Grantmaking template for Experience Cloud to create an external site for your applicants, grantees, and grant reviewers.

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

**Who:** Users with the Grantmaking Manager permission set can create and update Experience Cloud sites. Users with the Experience Cloud for Grantmaking permission set can view Experience Cloud sites.

SEE ALSO:

[Salesforce Help: Set Up a Grantmaking Experience Cloud Site \(can be outdated or unavailable during release preview\)](#)

## New Objects and Fields in Grantmaking

Do more with the new and updated Grantmaking objects.

### Use action plans for grantmaking records

Use the Target field on Action Plans to connect action plans to ApplicationDecision, ApplicationReview, Budget, BudgetAllocation, FundingAward, FundingAwardAmendment, FundingDisbursement, FundingAwardRequirement, FundingOpportunity, and Program.

### Indicate when a record is submitted

Use the Is Submitted field on ApplicationReview, Budget, FundingAwardAmendment, FundingAwardRequirement, and IndividualApplication.

### Connect grant records to programs

Manage programs as part of Grantmaking and use the new Program field on Budget, FundingAward, and FundingOpportunity.

### Connect budgets to accounts

Use the new Account field on Budget.

**Connect budget allocations to funding disbursements**

Use the new Funding Disbursement field.

SEE ALSO:

[Developer Guide: Grantmaking \(can be outdated or unavailable during release preview\)](#)

[Developer Guide: Grantmaking and Budget Management Data Model \(can be outdated or unavailable during release preview\)](#)

## New Grantmaking Metadata Type

Use the new Budget component in Experience Cloud, Lightning record pages, and Flow Builder.

## Lightning Web Component

**Enter multiple budget category values in one easy form**

Add the Budget Lightning Web Component to Experience Cloud, Lightning Experience record pages, or Flow Builder.

## Health Cloud

Schedule home healthcare visits with Home Health. Use the new Bed Search component in Crisis Support Center Management to search for beds across healthcare facilities. Utilization Management's new guided workflows help providers to submit authorization requests and follow up on them. Advanced Therapy Management has a new Therapy Orchestration solution. Enhancements in Integrated Care Management introduce support for Social Determinants of Health. New OmniScripts simplify provider enrollment in Provider Network Management. We also have enhancements in CRM Analytics, Health Cloud Contact Center, Assessments, and much more.

### IN THIS SECTION:

#### [Home Health](#)

Help your home healthcare organization optimize its operations with the new Home Health feature in Health Cloud. Collect and store patient preferences for services and care resources. Schedule start of care visits and recurring visits at one time, and assign care resources to them based on patient preferences. Use prior-authorization data from Utilization Management to determine recurring visit caps. Reschedule visits based on patient availability. Reassign visits based on care resource availability.

#### [Crisis Support Center Management Enhancements](#)

Quickly configure the Crisis Support Center Management app by following the new guided setup. Generate and share provider search reports, and search for beds across healthcare facilities based on facility name, provider name, specialty, bed type, or services.

#### [Utilization Management Enhancements](#)

Health Cloud's Utilization Management ensures ease of access to information and smoother collaboration on authorization requests between payers, providers, and the Electronic Health Record (EHR) systems. This connected platform, with its highly refined OmniScript process workflows and uninterrupted information exchange, enhances payers' and providers' ability to expedite the authorization request process. Providers can now deliver timely and optimal medical care to patients by gathering necessary clinical information from the EHR system and submitting authorization requests to the payer system.

#### [Advanced Therapy Management Enhancements](#)

Effortlessly orchestrate a patient's therapy with Advanced Therapy Management's new Therapy Orchestration feature. Therapy Orchestration offers customizable Salesforce flows that execute all the stages, substages, and tasks of an advanced therapy simultaneously. Admins can clone them for your specific requirements. Admins can also configure contextual, role-based tasks for each therapy step. Advanced Therapy Management's new app provides a visualization of the progression of stages, with tasks accessible only to the assigned user. Advanced Therapy Management offers additional customizable flows that generate steps for patient intake and apheresis, and control the visibility of the cancel and reschedule buttons.

### [Integrated Care Management Enhancements](#)

Integrated Care Management adds support for recording social determinants of health in care plans. Improvements in the user interface make viewing and creating care plans easier than before.

### [Provider Network Management Enhancements](#)

Simplify and automate the management of providers into payer networks using new Omnistudio-based workflows. Efficiently manage provider application and credentialing data, so you can enroll providers into your network and promptly help your members find care that fits their needs.

### [CRM Analytics Enhancements](#)

Streamline the prior authorization review workflow by using the new Enhanced Analytics for Healthcare app. Get insights into open tasks, prioritize the authorization review requests, identify the requests that need attention to avoid SLA breaches, and more. The new app provides personalized dashboards for utilization management and care management users and offers quick insights to monitor and assess outstanding care requests and reviews. Health Cloud includes a new guided setup page to help you verify CRM Analytics prerequisites and easily install the new app.

### [Health Cloud Contact Center Enhancements](#)

Quickly get all the information related to a member in one place in Health Cloud's Contact Center app. View a patient's health details in the advanced patient card, glance through recent engagements on the enhanced timeline, and verify a caller's identity and capture engagement details, all in the Contact Center app.

### [Assessments Enhancements](#)

Get a more holistic picture of a patient's health with easy-to-use health assessments. Use the power of OmniStudio and Discovery Framework to create custom assessments. Use the Guided Setup to get up and running with assessments. Navigate the assessment component easily with just two tabs instead of three. Patients can now receive email notifications with a link to complete their assessments in Experience Cloud.

### [Medication Review and Medication Management Enhancements](#)

Medication Management includes a new built-in flow to help your clinicians to save time and reduce manual errors when adding patient's medications.

### [Provider Search Enhancements](#)

When viewing provider search results, you can now select multiple providers and generate a shareable PDF report. Guest users can search for providers on an Experience Cloud site.

### [Actionable Relationship Center Enhancements](#)

Add the Actionable Relationship Center (ARC) component to patient page layouts to show the complex relationships between patients and other people and organizations in healthcare.

### [Intelligent Document Automation Enhancements](#)

Simplify the document management process by relating received documents to multiple records in one screen. An increase in TextTract page limits increases efficiency by allowing more page uploads at once. Increase efficiency by having patients upload their own documents on an Experience Cloud site.

### [Virtual Care Enhancements](#)

Virtual Care is now available in more countries. You can now add a calendar file to an appointment notification email to increase appointment attendance.

### [Salesforce Scheduler Enhancements](#)

Now you can book assets with Salesforce Scheduler in Health Cloud. There are also new usage limits for Salesforce Scheduler.

### [New and Changed Health Cloud Metadata Types](#)

Make the most of the new and changed metadata types of Health Cloud.

### [Health Cloud Has New and Changed Objects](#)

Store and access more data with these new and changed Health Cloud objects.

### [New Invocable Actions in Health Cloud](#)

Use the new invocable actions for Health Cloud.

## Home Health

Help your home healthcare organization optimize its operations with the new Home Health feature in Health Cloud. Collect and store patient preferences for services and care resources. Schedule start of care visits and recurring visits at one time, and assign care resources to them based on patient preferences. Use prior-authorization data from Utilization Management to determine recurring visit caps. Reschedule visits based on patient availability. Reassign visits based on care resource availability.

And because Home Health is based on Salesforce Field Service, you can use Field Service features like Enhanced Scheduling and Optimization and the Field Service mobile app. The Field Service Mobile app lets service resources track their schedules, perform visits, view clinical data, and record and update patient preferences, all from the field.

### IN THIS SECTION:

#### [Record Patient Preferences for Home Healthcare Services](#)

Your users can collect a patient's preferences about care services and care resources and use those preferences to find the most suitable care resources for their visits. A scheduler can collect these preferences during the initial referral or the care resource performing the visit can collect them. Assigning service resources that meet a patient's preferences boosts their satisfaction with the provided service.

#### [Schedule Visits Based on Preferences](#)

Schedule a start of care visit or a series of recurring visits at one time with the Schedule Home Healthcare Visit flow. Visits scheduled using this flow are automatically assigned with care resources that best fit the patient's preferences and the skills required for the care service. This flow saves your users the time they would need to manually schedule each recurring visit and assign the appropriate care resource.

#### [Use Prior-Authorization Data to Determine Visit Count](#)

Home Health's integration with Utilization Management enables it to use prior-authorization data to determine the maximum number of visits that can be scheduled for a service request. Users can indicate that authorization is required when scheduling recurring visits to avoid exceeding the approved quantity. This validation helps your organization minimize disputes with payers.

#### [Reassign Visits in Bulk](#)

Your schedulers can save time by reassigning visits in bulk if a care resource can't make it to their appointments. The scheduler can either manually select the new care resource or have the system select one automatically.

#### [Update Assignments Automatically When Resources Take Time Off](#)

Home Health automates how a care resource's time off is handled to ensure that their scheduled appointments are kept updated. When the scheduler creates a Resource Absence record for a care resource's time off, a flow is triggered that asynchronously updates the status of the appointments that conflict with the time off.

#### [Operate in the Field with the Salesforce Field Service Mobile App](#)

Care resources can use the Salesforce Field Service mobile app to access Home Health and perform visits in the field. Users can see the visits that they're signed up for and the tasks they have to complete for those visits. Users who have the appropriate permissions can also see the patient's clinical data and update their preferences. Offline mode is supported as well.

#### [Accelerate your Home Health Implementation with the Guided Setup](#)

Home Health has a guided setup page that helps you get up and running as soon as possible. Shorten implementation time by following the in-org instructions to configure all the different parts of Home Health. The page also shows your progress and the estimated time required for each step.

## Record Patient Preferences for Home Healthcare Services

Your users can collect a patient's preferences about care services and care resources and use those preferences to find the most suitable care resources for their visits. A scheduler can collect these preferences during the initial referral or the care resource performing the visit can collect them. Assigning service resources that meet a patient's preferences boosts their satisfaction with the provided service.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions of Salesforce with the Health Cloud and Home Health Add-on licenses.

**How:** Place the Patient Preferences for Home Health lightning component on the Person Account record page. In Setup, define skills and skill types in your org to represent the preferences that you support.

## Schedule Visits Based on Preferences

Schedule a start of care visit or a series of recurring visits at one time with the Schedule Home Healthcare Visit flow. Visits scheduled using this flow are automatically assigned with care resources that best fit the patient's preferences and the skills required for the care service. This flow saves your users the time they would need to manually schedule each recurring visit and assign the appropriate care resource.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions of Salesforce with Health Cloud and the Home Health add-on license.

**Who:** To schedule visits, users need the Manage Home Health permission set license.

**How:** Place the Home Health Visits lightning component on the Person Account record page. Users can use the New Home Visit button on this component to launch the flow.

## Use Prior-Authorization Data to Determine Visit Count

Home Health's integration with Utilization Management enables it to use prior-authorization data to determine the maximum number of visits that can be scheduled for a service request. Users can indicate that authorization is required when scheduling recurring visits to avoid exceeding the approved quantity. This validation helps your organization minimize disputes with payers.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions of Salesforce with the Health Cloud and Home Health Add-on licenses.

**Who:** To schedule visits, users need the Manage Home Health permission set license.

**How:** No additional configuration is necessary. The validation is enforced when the **Authorization Required** checkbox is selected during visit scheduling and the selected service request has an associated Care Request Item record. To show your users the list of service requests and authorizations that a patient has, place the Home Health Authorization lightning component on the person account record page.

## Reassign Visits in Bulk

Your schedulers can save time by reassigning visits in bulk if a care resource can't make it to their appointments. The scheduler can either manually select the new care resource or have the system select one automatically.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions of Salesforce with the Health Cloud and Home Health Add-on licenses.

**Who:** To reassign visits, users need the Manage Home Health permission set license.

**How:** Place the Home Health Visits lightning component on the Service Resource record page. Users can then select the required visits and click **Assign Manually** or **Auto-Assign** as needed.

## Update Assignments Automatically When Resources Take Time Off

Home Health automates how a care resource's time off is handled to ensure that their scheduled appointments are kept updated. When the scheduler creates a Resource Absence record for a care resource's time off, a flow is triggered that asynchronously updates the status of the appointments that conflict with the time off.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions of Salesforce with the Health Cloud and Home Health Add-on licenses.

**How:** Clone the Home Health Resource Absence flow, configure the Update Appointment Status action element to select the appropriate status, save the flow, and activate it.

## Operate in the Field with the Salesforce Field Service Mobile App

Care resources can use the Salesforce Field Service mobile app to access Home Health and perform visits in the field. Users can see the visits that they're signed up for and the tasks they have to complete for those visits. Users who have the appropriate permissions can also see the patient's clinical data and update their preferences. Offline mode is supported as well.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions of the Salesforce in Salesforce Field Service mobile app, with the Health Cloud and the Home Health Add-on licenses

**Who:** To use the mobile app, users need the Home Health Caregiver or the Home Health Clinician permission set license. To see a patient's clinical data and preferences, users need the Home Health Clinician permission set license.

**How:** Using the Object Manager, edit the page layout of Work Order. Add the Patient Details quick action from the Mobile & Lightning Actions menu to the Salesforce Mobile and Lightning Experience Actions section of the page layout.

## Accelerate your Home Health Implementation with the Guided Setup

Home Health has a guided setup page that helps you get up and running as soon as possible. Shorten implementation time by following the in-org instructions to configure all the different parts of Home Health. The page also shows your progress and the estimated time required for each step.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions of Salesforce with the Health Cloud and Home Health Add-on licenses.

**How:** You can find the guided setup on the Home Health Settings page in Setup.

## Crisis Support Center Management Enhancements

Quickly configure the Crisis Support Center Management app by following the new guided setup. Generate and share provider search reports, and search for beds across healthcare facilities based on facility name, provider name, specialty, bed type, or services.

### IN THIS SECTION:

#### [Set Up Crisis Support Center Management More Easily](#)

Quickly set up Crisis Support Center Management using the new guided setup. Configure the different app components by following step-by-step tasks. In-app links to setup pages make it easy to complete tasks efficiently.

#### [Search for Beds Across Healthcare Facilities](#)

Use the Bed Search component in the Crisis Support Center Management app to find beds across healthcare facilities based on facility name, provider name, specialty, bed type, or services. Select up to 50 records from the bed search results and generate a shareable PDF report.

## Set Up Crisis Support Center Management More Easily

Quickly set up Crisis Support Center Management using the new guided setup. Configure the different app components by following step-by-step tasks. In-app links to setup pages make it easy to complete tasks efficiently.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions with Health Cloud.

**Who:** This feature is available to users with 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:** From Setup, in the Quick Find box, enter *Crisis Support Center Management App Settings*, and select **Crisis Support Center Management App Settings**. To access the guided setup, enable **Crisis Support Center Management App**.

## Search for Beds Across Healthcare Facilities

Use the Bed Search component in the Crisis Support Center Management app to find beds across healthcare facilities based on facility name, provider name, specialty, bed type, or services. Select up to 50 records from the bed search results and generate a shareable PDF report.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions with Health Cloud.

**Who:** This feature is available to users with 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:** The Bed Search component comes pre-configured for Crisis Support Center Management. Make sure that data about care facility beds and the associated healthcare facilities is set up correctly.

SEE ALSO:

[Salesforce Help: Configure Bed Search for Crisis Support Center Management](#)

[Salesforce Help: Search for Beds Across Healthcare Facilities in Crisis Support Center Management](#)

## Utilization Management Enhancements

Health Cloud's Utilization Management ensures ease of access to information and smoother collaboration on authorization requests between payers, providers, and the Electronic Health Record (EHR) systems. This connected platform, with its highly refined OmniScript process workflows and uninterrupted information exchange, enhances payers' and providers' ability to expedite the authorization request process. Providers can now deliver timely and optimal medical care to patients by gathering necessary clinical information from the EHR system and submitting authorization requests to the payer system.

IN THIS SECTION:

[Facilitate a Streamlined Submission of Authorization Requests to Payers](#)

Empower your authorization coordinators to easily handle the authorization request process with a predefined suite of OmniStudio components that combine to provide smooth, guided user interaction. Use the centralized request submission workflow for searching patients, selecting service requests, uploading documents, and submitting requests to payers.

[Inquire and Get Up-to-Date Status of Authorization Requests](#)

Reduce administrative delays and increase data accuracy by setting up a process that helps your authorization coordinators to receive timely status updates from the payer on previously submitted authorization requests. Your authorization coordinators can send an inquiry request on a particular case and based on the response received, make quick, informed decisions about the patient's treatment.



### [Make Faster Clinical Determinations by Using Artificial Intelligence](#)

Save time and provide timely care by using recommendations for the services pathway and the services to bundle based on a member's primary diagnosis and previously submitted authorization requests. As a payer, get a list of recommended services that you're likely to receive from a provider. Build a workflow based on the recommended services to autoapprove authorization requests and save time. As a provider, get a list of recommended services that you're likely to submit to a payer. Choose to include the recommended services in your authorization requests and reduce your effort.

## Facilitate a Streamlined Submission of Authorization Requests to Payers

Empower your authorization coordinators to easily handle the authorization request process with a predefined suite of OmniStudio components that combine to provide smooth, guided user interaction. Use the centralized request submission workflow for searching patients, selecting service requests, uploading documents, and submitting requests to payers.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions of Health Cloud where person accounts and the 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 payer and EHR systems using industry-specific APIs and solid technological OmniStudio based workflows provides the tools necessary for providers to navigate the complex authorization process.

**How:** Add picklist values named Draft, Pended, Approved, Denied, and Errored to the Status picklist on the Case object.

Add the HealthCloudUtilizationManagementProviderAuthorizationLaunch FlexCard to the user's home page.

Your authorization coordinator can now see the Create Authorization Request action button, which launches the HealthCloudUtilizationManagementProviderAuthorizationRequest OmniScript process.



**Note:** We recommend using cloned versions of OmniScripts and FlexCards so that you don't face any process disruptions when predefined OmniScripts are updated during automatic upgrades. Simply clone the above OmniScript and FlexCard, retain the settings, save with a different name, and activate the cloned version. Relink the cloned FlexCard to the cloned OmniScript.

### SEE ALSO:

[Salesforce Help: Create and Submit Authorization Requests to Payers](#)

[Salesforce Help: Authorization Request Process Flow in a Provider's Office](#)

[Salesforce Help: Authorization Request Process Setup for Providers](#)

[Salesforce Developer Guide: Industry Integrations](#)

## Inquire and Get Up-to-Date Status of Authorization Requests

Reduce administrative delays and increase data accuracy by setting up a process that helps your authorization coordinators to receive timely status updates from the payer on previously submitted authorization requests. Your authorization coordinators can send an inquiry request on a particular case and based on the response received, make quick, informed decisions about the patient's treatment.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions of Health Cloud where person accounts and the 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.

**How:** Add picklist values named Draft, Pended, Approved, Denied, and Errored to the Status picklist on the Case object.

Add the HealthCloudUtilizationManagementProviderInquiryLaunch FlexCard to the Case record page.

Your authorization coordinator can now see the Inquire Status action button, which launches the HealthCloudUtilizationManagementProviderInquiryRequest OmniScript process.



**Note:** We recommend using cloned versions of OmniScripts and FlexCards so that you don't face any process disruptions when predefined OmniScripts are updated during automatic upgrades. Simply clone the above OmniScript and FlexCard, retain the settings, save with a different name, and activate the cloned version. Relink the cloned FlexCard to the cloned OmniScript.

#### SEE ALSO:

[Salesforce Help: Inquire About the Status of an Authorization Request](#)

[Salesforce Help: Authorization Request Process Flow in a Provider's Office](#)

[Salesforce Help: Authorization Request Process Setup for Providers](#)

[Salesforce Developer Guide: Industry Integrations](#)

## Make Faster Clinical Determinations by Using Artificial Intelligence

Save time and provide timely care by using recommendations for the services pathway and the services to bundle based on a member's primary diagnosis and previously submitted authorization requests. As a payer, get a list of recommended services that you're likely to receive from a provider. Build a workflow based on the recommended services to autoapprove authorization requests and save time. As a provider, get a list of recommended services that you're likely to submit to a payer. Choose to include the recommended services in your authorization requests and reduce your effort.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions with Health Cloud.

**Who:** The Services Pathway and Bundling Recommendations CRM Analytics template is available to users with the Revenue Intelligence for Health license and the Utilization Management permissions.

**How:** To get recommendations, go to Analytics Studio and create an app by using the Services Pathway and Bundling Recommendations template. The app creates preconfigured recipes that then generate the recommendations.

- As a payer, to see the services that you're likely to receive for a member, go to the Recommended Services Pathway dashboard. You can also see the history of services already received for a member.

Recommended Services Pathway

Services PathwayMember History

Primary Diagnosis: ICD-10-CM - Z96. 653 Knee Arthroplasty Right Knee

Einstein recommends services that are likely to be received, based on the member's primary diagnosis.

Showing services that are at least 80% likely to be submitted.

Showing 1-3 of 12 recommendations

AllService CodesDrug Codes

Current

HCPCS - S9131 - Physical therapy in the home

Key Insights

Approved Mean Quantity: 5 Days

Approval Rate: 88.65%

Likelihood

100%

Received

NDC - 69399-184-81 - Celebrex 200 mg capsule

Key Insights

Approved Mean Quantity: 5 Units

Approval Rate: 76.35%

Likelihood

100%

Expected

CPT - 78457 - Venous thrombosis imaging, venogram

Key Insights

Approved Mean Quantity: 5 Units

Approval Rate: 91.21%

Likelihood

100%

Recommended Services Pathway

Services Pathway

Member History

Member History

View the previously submitted services authorization requests for the member.

Duration: 30 day(s)

0 - 30

Primary Diagnosis

All

Showing 1-3 of 73 services

All

Service Codes

Drug Codes

Diagnosis:

ICD-10 - E03.0 Congenital hypothyroidism with diffuse goiter

Open

630264: Congenital Hypothyroidism Genetic Panel

Key Insights ⓘ

Requested Quantity: 1 Units

Approved Quantity: --

Diagnosis:

ICD-10 - Z20822 Contact with and (suspected) exposure to COVID-19

Approved

CPT 0001A - Administration, first dose

Key Insights ⓘ

Requested Quantity: 1 Units

Approved Quantity: 1 Units

Diagnosis:

ICD-10 - Z53.33 Arthroscopic surgical procedure converted to open procedure

Denied

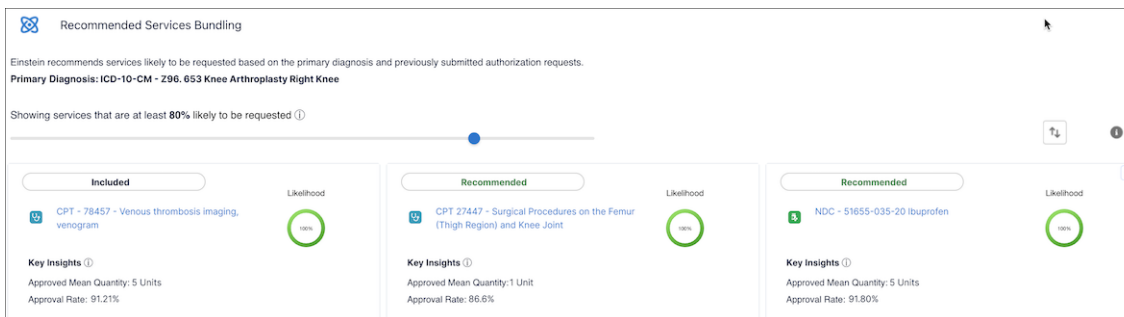
CPT 29870 Endoscopy/Arthroscopy Procedures on the Musculoskeletal System

Key Insights ⓘ

Requested Quantity: 2 Units

Approved Quantity: 0 Units

- As a provider, to see the services that you’re likely to submit, go to the Recommended Services Bundling dashboard.



## SEE ALSO:

[Salesforce Help: Services Pathway and Bundling Recommendations](#) (can be outdated or unavailable during release preview)

[Salesforce Help: Recommended Services Pathway for Payers](#) (can be outdated or unavailable during release preview)

[Salesforce Help: Recommended Services Bundling for Providers](#) (can be outdated or unavailable during release preview)

## Advanced Therapy Management Enhancements

Effortlessly orchestrate a patient's therapy with Advanced Therapy Management's new Therapy Orchestration feature. Therapy Orchestration offers customizable Salesforce flows that execute all the stages, substages, and tasks of an advanced therapy simultaneously. Admins can clone them for your specific requirements. Admins can also configure contextual, role-based tasks for each therapy step. Advanced Therapy Management's new app provides a visualization of the progression of stages, with tasks accessible only to the assigned user. Advanced Therapy Management offers additional customizable flows that generate steps for patient intake and apheresis, and control the visibility of the cancel and reschedule buttons.

## IN THIS SECTION:

### [Easily Orchestrate Advanced Therapies with Customizable Flows](#)

Execute complex advanced therapies with only a few clicks by running the Process Advanced Therapy Work Orders orchestration flow. Using this flow, you can automatically run subflows that initiate therapy stages, steps within each stage, and tasks that are part of each step. Automatically assign tasks to org-level team participants and transition to the next step in the therapy framework.

### [Collaborate Efficiently with Participant Roles for Advanced Therapies](#)

Seamlessly allocate therapy tasks to team members using participant roles. Assign a task flow or a component task to a role and then assign the role to team members to facilitate smoother collaboration between stakeholders of a therapy.

### [Make Therapy Task Assignment Easy with Teams](#)

Ensure better participation of stakeholders in therapy tasks with teams. Configure teams and team members to make roles and users easily available in flows that generate runtime records for tasks.

### [Create Custom Tasks with Action Plan Templates in Advanced Therapies](#)

Easily customize and allocate therapy tasks with action plan templates. Generate assessment task records for each substage of a therapy, and assign the tasks to the different stakeholders involved.

### [Clone Sample Flows to Generate Custom Work Order Steps](#)

Use Advanced Therapy Management's sample flows as templates to generate work order step records that are specific to your requirements. Clone and customize the Generate Work Order Steps for Patient Intake and Generate Work Order Steps for Apheresis flows to modify and add steps to a therapy stage.

### [Complete Therapy Tasks Faster with Lightning Aura Components](#)

Easily navigate to different screens to complete a task and update the task status using Lightning Aura Components in Therapy Orchestration.

### [Help Users Complete Therapy Tasks with an Apex Trigger](#)

Help users perform therapy tasks even when automatic assignment is unavailable or out of scope. Add to the existing Apex Trigger for the Assessment Task object or create an Apex Trigger that manually assigns tasks using criteria-based sharing for relevant users.

### [Reschedule and Repeat a Stage In a Therapy Orchestration](#)

As a gene therapy coordinator, you can help your org accommodate unexpected changes in the therapy lifecycle by using non-linear flows that repeat therapy stages. Non-linear flows use Multi-Step Scheduling and Therapy Orchestration to quickly reschedule slots, rerun workflows, and assign a fresh set of tasks to the relevant users.

### [View the Progress of Therapy Steps and Tasks](#)

Help users easily monitor the progress of an advanced therapy by adding the Work Procedure Step Progression and Work Order Step Progression Lightning App Builder components to the Care Program Enrollee record page. The Work Procedure Step Progression component provides a linear visualization of the progress of the therapy through a series of work types. The Work Order Step Progression component displays the current, upcoming, and completed tasks in each work order step and the user they're assigned to.

### [Advanced Therapy Management Has a New App](#)

View information about the stages and steps of a therapy in one place with the new Advanced Therapy Management lightning app. Follow the progress of the therapy, view and perform assigned tasks, and view scheduled and canceled appointments in the Appointment Slots section.

### [Multi-Step Scheduling License Update](#)

You can now use Multi-Step Scheduling without purchasing the Asset Scheduler Add-On license. Both the Health Cloud license and the Health Cloud for Life Science license now provide 12000 service appointments per org per annum and 300 service appointments per user per annum. To purchase 10000 additional service appointments per org per month, you must purchase the Salesforce Scheduler—Additional Appointments license.

## Easily Orchestrate Advanced Therapies with Customizable Flows

Execute complex advanced therapies with only a few clicks by running the Process Advanced Therapy Work Orders orchestration flow. Using this flow, you can automatically run subflows that initiate therapy stages, steps within each stage, and tasks that are part of each step. Automatically assign tasks to org-level team participants and transition to the next step in the therapy framework.

**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 Health Cloud Advanced Therapy Orchestration permission set, the Industries Visit permission set, the new Health Cloud Advanced Therapy Orchestration permission set license, and the Industries Visit permission set license.

**How:** Associate the care program record with the work procedure record. Set the category of the care program record as an advanced therapy. Override the default evaluation flow and update its sharing settings.

From Setup, go to Flows and select **Evaluate Step and Task Completion Status**. In Flow Builder, clone the flow to override the default version and activate it.

SEE ALSO:

[Salesforce Help: Considerations for Running the Default Therapy Orchestration Flows](#)

[Salesforce Help: Customize the Orchestration Flows in Advanced Therapies](#)

## Collaborate Efficiently with Participant Roles for Advanced Therapies

Seamlessly allocate therapy tasks to team members using participant roles. Assign a task flow or a component task to a role and then assign the role to team members to facilitate smoother collaboration between stakeholders of a therapy.

**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 Health Cloud Advanced Therapy Orchestration permission set and the new Health Cloud Advanced Therapy Orchestration permission set license.

**How:** From Setup, find and select **Participant Roles**. To create a participant record, click **New**.

SEE ALSO:

[Salesforce Help: Set Up Participant Roles for Therapy Orchestration](#)

## Make Therapy Task Assignment Easy with Teams

Ensure better participation of stakeholders in therapy tasks with teams. Configure teams and team members to make roles and users easily available in flows that generate runtime records for tasks.

**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 Health Cloud Advanced Therapy Orchestration permission set and the new Health Cloud Advanced Therapy Orchestration permission set license.

**How:** From the App Launcher, find and select **Teams** and **Team Members** to create records for each object. In the Team Member record, add the participant role that's assigned to the task and the user who performs the task.

SEE ALSO:

[Salesforce Help: Create Teams and Team Members for Therapy Orchestration](#)

## Create Custom Tasks with Action Plan Templates in Advanced Therapies

Easily customize and allocate therapy tasks with action plan templates. Generate assessment task records for each substage of a therapy, and assign the tasks to the different stakeholders involved.

**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 Health Cloud Advanced Therapy Orchestration permission set, the Industries Visit permission set, the new Health Cloud Advanced Therapy Orchestration permission set license, and the Industries Visit permission set license.

**How:** From the App Launcher, find and select **Action Plan Templates**. Create a template, add task flows or component tasks for specific roles, and publish the template. To generate custom therapy tasks, clone the Generate Work Order Steps for Patient Intake flow or the Generate Work Order Steps for Apheresis flow. Add the new action plan template ID to the action element you want to modify.

SEE ALSO:

[Salesforce Help: Create Action Plan Templates for Therapy Orchestration](#)

## Clone Sample Flows to Generate Custom Work Order Steps

Use Advanced Therapy Management's sample flows as templates to generate work order step records that are specific to your requirements. Clone and customize the Generate Work Order Steps for Patient Intake and Generate Work Order Steps for Apheresis flows to modify and add steps to a therapy stage.

**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 Health Cloud Advanced Therapy Orchestration permission set and the new Health Cloud Advanced Therapy Orchestration permission set license.

**How:** From Setup, go to Flows, and select the **Generate Work Order Steps for Patient Intake** flow or the **Generate Work Order Steps for Apheresis** flow. In Flow Builder, add, remove, or modify the elements as per your requirements.


SEE ALSO:

[Salesforce Help: Generate Customized Work Order Steps or Therapy Tasks for Users](#)

## Complete Therapy Tasks Faster with Lightning Aura Components

Easily navigate to different screens to complete a task and update the task status using Lightning Aura Components in Therapy Orchestration.

**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.

**How:** From Setup, click , and go to the Developer Console. Click **File > New > Lightning Component**. Use the sample codes in the *Create a Lightning Aura Component for Tasks in Therapy Orchestration* and *Update Component Task Status with Lightning Message Channel* help topics.

SEE ALSO:

[Salesforce Help: Create a Lightning Aura Component for Tasks in Therapy Orchestration](#)

[Salesforce Help: Update Component Task Status with Lightning Message Channel](#)


## Help Users Complete Therapy Tasks with an Apex Trigger

Help users perform therapy tasks even when automatic assignment is unavailable or out of scope. Add to the existing Apex Trigger for the Assessment Task object or create an Apex Trigger that manually assigns tasks using criteria-based sharing for relevant users.

**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 Industries Visit permission set and the Industries Visit permission set license.

**How:** Create a custom field in the Assessment Task object. Add to your existing Apex Trigger for this object or, if your org doesn't already have one, create one with these instructions

Click , and go to the Developer Console. Click **File > New > Apex Trigger**. Use the sample code in the *Manually Assign Therapy Tasks to Users* help topic to create your apex trigger. Assign the task to users with a criteria-based sharing rule.

SEE ALSO:

[Salesforce Help: Manually Assign Therapy Tasks to Users](#)



## Reschedule and Repeat a Stage In a Therapy Orchestration

As a gene therapy coordinator, you can help your org accommodate unexpected changes in the therapy lifecycle by using non-linear flows that repeat therapy stages. Non-linear flows use Multi-Step Scheduling and Therapy Orchestration to quickly reschedule slots, rerun workflows, and assign a fresh set of tasks to the relevant users.

**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 Health Cloud Advanced Therapy Orchestration permission set and the new Health Cloud Advanced Therapy Orchestration permission set license.

**How:** From the App Launcher, find and select a Care Program Enrollee record that's enrolled in an advanced therapy. In the Appointment Slots tab, click **Reschedule** to book the slots from the therapy stage that must be redone.


SEE ALSO:

[Salesforce Help: Repeat Stages In a Therapy Orchestration](#)

## View the Progress of Therapy Steps and Tasks

Help users easily monitor the progress of an advanced therapy by adding the Work Procedure Step Progression and Work Order Step Progression Lightning App Builder components to the Care Program Enrollee record page. The Work Procedure Step Progression component provides a linear visualization of the progress of the therapy through a series of work types. The Work Order Step Progression component displays the current, upcoming, and completed tasks in each work order step and the user they're assigned to.

**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.

**How:** From the App Launcher, go to the Advanced Therapy Management app. Go to the Care Program Enrollee record page, click , and then click **Edit Page**. Move the Work Procedure Step Progression and Work Procedure Step Progression Lightning App Builder components onto an editable part of the page.

SEE ALSO:

[Salesforce Help: Add Lightning App Builder Components to Track Step Progress](#)

## Advanced Therapy Management Has a New App

View information about the stages and steps of a therapy in one place with the new Advanced Therapy Management lightning app. Follow the progress of the therapy, view and perform assigned tasks, and view scheduled and canceled appointments in the Appointment Slots section.

**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 Health Cloud Advanced Therapy Orchestration permission set and the new Health Cloud Advanced Therapy Orchestration permission set license.

**How:** From the App Launcher, find and select **Advanced Therapy Management**.

SEE ALSO:

[Salesforce Help: Get a Complete View of an Enrollee's Advanced Therapy](#)

## Multi-Step Scheduling License Update

You can now use Multi-Step Scheduling without purchasing the Asset Scheduler Add-On license. Both the Health Cloud license and the Health Cloud for Life Science license now provide 12000 service appointments per org per annum and 300 service appointments per user per annum. To purchase 10000 additional service appointments per org per month, you must purchase the Salesforce Scheduler–Additional Appointments license.

SEE ALSO:

[Salesforce Help: Learn About the Advanced Therapy Management Licenses](#)

## Integrated Care Management Enhancements

Integrated Care Management adds support for recording social determinants of health in care plans. Improvements in the user interface make viewing and creating care plans easier than before.

IN THIS SECTION:

### [Add Social Determinants of Health in Care Plans](#)

Care coordinators can now record social determinants of health when they use Integrated Care Management to create care plans for their patients. Support for social determinants as problems in care plans gives your care coordinators the ability to paint a more comprehensive picture of their patients' health.

### [Visualize Care Plans Better with the Updated Interface](#)

Care coordinators can now view the full hierarchical structure of a care plan and navigate to any of its records with a single click. Users can also create or edit conditions, social determinants, goals, and interventions from this interface.

### [Guided OmniScript Flow Enhancements](#)

Integrated Care Management includes improvements to the guided OmniScript flow that helps your users create care plans.

### [Health Cloud Foundation Permission Set Now Includes Care Barriers and Care Barrier Types](#)

You can now grant Read, Create, Edit, and Delete access to the Care Barriers and Care Barrier Types objects by using the Health Cloud Foundation permission set. Before the Summer '23 release, only the Health Cloud Social Determinants permission set granted access to these objects.

SEE ALSO:

[Salesforce Help: Orchestrate Patient Care with Integrated Care Management](#)

## Add Social Determinants of Health in Care Plans

Care coordinators can now record social determinants of health when they use Integrated Care Management to create care plans for their patients. Support for social determinants as problems in care plans gives your care coordinators the ability to paint a more comprehensive picture of their patients' health.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions of Salesforce with Health Cloud.

**How:** Create Problem Definition records with the Usage Type field set to Barrier and the Barrier Type field referencing a valid Care Barrier Type record. When care coordinators use these problem definitions to create care plans, those problems are stored as Care Barrier records.

## Visualize Care Plans Better with the Updated Interface

Care coordinators can now view the full hierarchical structure of a care plan and navigate to any of its records with a single click. Users can also create or edit conditions, social determinants, goals, and interventions from this interface.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions of Salesforce with Health Cloud.

**Why:** The all-in-one user interface helps your users perform their tasks more smoothly by reducing the number of clicks and the number of pages they have to navigate to.

The screenshot displays the 'Care Plan Status' interface. At the top, there is a dropdown menu set to 'All', a refresh button, and a 'New Care Plan' button. Below this, the 'Diabetes Care Plan' is selected, showing a status of 'Active' and a case ID of '00001043'. The 'Details' section includes a table for 'Conditions(1)' with one entry: 'Diabetes' (Severity: Medium, Condition Status: In Progress). Below that is a table for 'Goals(1)' with one entry: 'Regulate Blood Sugar Levels' (Priority: Medium, Due Date: 3/29/2023, Progress: 0%). The 'Action Plans(1)' section shows one entry: 'Diet Plan' (Status: In Progress, Start Date: 3/29/2023). Finally, the 'Interventions(2)' section shows two entries: 'Consult Dietician' (Priority: Low, Due Date: 7/7/2023, Status: Completed) and another intervention (Priority: Low, Due Date: 7/7/2023, Status: Completed).

**How:** No additional configuration is necessary. These changes are automatically available when you upgrade to the Summer '23 release if you previously configured the `IndustriesHCCarePlanManager` FlexCard.

## Guided OmniScript Flow Enhancements

Integrated Care Management includes improvements to the guided OmniScript flow that helps your users create care plans.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions of Salesforce with Health Cloud.

Here's the list of changes in the guided OmniScript flow:

- Renamed the second screen from 'Customize Care Plan' to 'Select Care Plan Components'
- Removed the requirement for users to enter case information
- Renamed the 'Problems' section to 'Conditions' in the second screen
- Renamed the 'Interventions' section to 'Action Plans' in the second screen
- Added a section for social determinants in the second screen
- Removed the Save for Later function
- Moved the checkbox for selecting components of a care plan from the right side of the row to the left
- Added icons for conditions, social determinants, goals, action plans, and interventions
- Changed the button label in the second screen of the OmniScript from 'Save Care Plan' to 'Save'

## Health Cloud Foundation Permission Set Now Includes Care Barriers and Care Barrier Types

You can now grant Read, Create, Edit, and Delete access to the Care Barriers and Care Barrier Types objects by using the Health Cloud Foundation permission set. Before the Summer '23 release, only the Health Cloud Social Determinants permission set granted access to these objects.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions of Salesforce with Health Cloud.

**How:** This change automatically assigns additional permissions to users who are assigned the Health Cloud Foundation permission set. If you need to restrict access to the Care Barriers and Care Barrier Types objects for a particular user profile, you can edit the Standard Object Permissions for that profile in Setup.

## Provider Network Management Enhancements

Simplify and automate the management of providers into payer networks using new Omnistudio-based workflows. Efficiently manage provider application and credentialing data, so you can enroll providers into your network and promptly help your members find care that fits their needs.

### IN THIS SECTION:

#### [Streamline Provider Enrollment with Guided Process Workflows](#)

Reduce provider onboarding time while increasing engagement, satisfaction, and operational efficiency by using our OmniStudio-based guided workflows for Provider Network Management. Give your users a one-stop solution for provider registration, nomination, recruitment, credentialing, and verification. With Provider Network Management payers and provider groups can now easily enroll providers, construct effective provider networks, and retain top healthcare talent.

### Streamline Provider Enrollment with Guided Process Workflows

Reduce provider onboarding time while increasing engagement, satisfaction, and operational efficiency by using our OmniStudio-based guided workflows for Provider Network Management. Give your users a one-stop solution for provider registration, nomination, recruitment, credentialing, and verification. With Provider Network Management payers and provider groups can now easily enroll providers, construct effective provider networks, and retain top healthcare talent.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions of Health Cloud provisioned with the Health Cloud Provider Network Management Add-On license.

**Who:** This feature is available to users who have the Health Cloud Provider Network Management, OmniStudio Admin, and OmniStudio User permission sets.

### SEE ALSO:

[Salesforce Help: Manage Your Network of Providers](#)

[Salesforce Help: Manage Your Provider Network Participants and Contracts](#)

## CRM Analytics Enhancements

Streamline the prior authorization review workflow by using the new Enhanced Analytics for Healthcare app. Get insights into open tasks, prioritize the authorization review requests, identify the requests that need attention to avoid SLA breaches, and more. The new app provides personalized dashboards for utilization management and care management users and offers quick insights to monitor and assess outstanding care requests and reviews. Health Cloud includes a new guided setup page to help you verify CRM Analytics prerequisites and easily install the new app.

## IN THIS SECTION:

[Expedite Health Cloud CRM Analytics Configurations](#)

Easily configure Health Cloud CRM Analytics by following simple, clear steps for the necessary tasks—including prerequisite checks and dashboard installations—all in one place. The new Health Cloud CRM Analytics Settings page helps you complete those tasks by providing a guided setup experience with links to related in-app Setup pages.

[Set Up the New Health Analytics App from Within Health Cloud](#)

Save time by installing dashboards for the new Enhanced Analytics for Healthcare app from the new Health Cloud CRM Analytics Settings page in your org. With this simplified solution, you can avoid visiting the Analytics Studio to install, update, or delete dashboards of the new app.

[Streamline Care Management by Using Analytics Dashboards](#)

The Enhanced Analytics for Healthcare app provides dashboards for Care Managers to track and analyze team performance, task status, and care requests. Care managers can use the Care Management dashboards to get insights into their assigned tasks, track team members' progress, and prioritize assignments effectively across the team. Care managers can also monitor the task completion performance of the team based on the pending and completed tasks, and analyze the care plan history to identify the areas that need attention.

[Prioritize Payer Authorization Reviews Efficiently](#)

Enhance operational efficiencies and expedite authorization request reviews by using the new personalized authorization request dashboards. Payer personas like Utilization Management nurses and Intake Specialists can get real-time insights into their open authorization requests and reviews based on status, due date, discharge schedules, and priority level. Clinical reviewers can use the new Approval Rate card to gain insights into the approval rate of the requesting medical provider based on the provider's prior request history.

[Prioritize Provider Care Requests Efficiently](#)

Healthcare providers can now use the new Care Request dashboard to process prior authorization requests logically and promptly and ensure timely patient care and support. By using the personalized dashboard, Auth coordinators can get a comprehensive overview of the open requests and reviews based on the due date, review status, and priority level.

## Expedite Health Cloud CRM Analytics Configurations

Easily configure Health Cloud CRM Analytics by following simple, clear steps for the necessary tasks—including prerequisite checks and dashboard installations—all in one place. The new Health Cloud CRM Analytics Settings page helps you complete those tasks by providing a guided setup experience with links to related in-app Setup pages.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions of Health Cloud provisioned with the Health Cloud or Health Cloud for Life Sciences permission set license.

**Who:** This feature is available to users who have the HealthCare Analytics Admin and the CRM Analytics Plus Admin permission sets.

**How:** From Setup, go to the Health Cloud CRM Analytics Settings page.

## SEE ALSO:

[Salesforce Help: Set up the Enhanced Analytics for Healthcare App](#)

[Salesforce Help: Get to Know the Enhanced Analytics for Healthcare App](#)

[Salesforce Help: Install the Enhanced Analytics for Healthcare App](#)

## Set Up the New Health Analytics App from Within Health Cloud

Save time by installing dashboards for the new Enhanced Analytics for Healthcare app from the new Health Cloud CRM Analytics Settings page in your org. With this simplified solution, you can avoid visiting the Analytics Studio to install, update, or delete dashboards of the new app.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions of Health Cloud provisioned with the Health Cloud or Health Cloud for Life Sciences permission set license.

**Who:** This feature is available to users who have the HealthCare Analytics Admin and the CRM Analytics Plus Admin permission sets.

**How:** From Setup, go to the Health Cloud CRM Analytics Settings page. Install the Utilization Management Analytics dashboard, Care Management Analytics dashboard, or both. You can also update or delete the app's dashboards from this page.

### SEE ALSO:

[Salesforce Help: Set up the Enhanced Analytics for Healthcare App](#)

[Salesforce Help: Get to Know the Enhanced Analytics for Healthcare App](#)

[Salesforce Help: Install the Enhanced Analytics for Healthcare App](#)

[Salesforce Help: Change Category Selections After Installing the Enhanced Analytics for Healthcare App](#)

## Streamline Care Management by Using Analytics Dashboards

The Enhanced Analytics for Healthcare app provides dashboards for Care Managers to track and analyze team performance, task status, and care requests. Care managers can use the Care Management dashboards to get insights into their assigned tasks, track team members' progress, and prioritize assignments effectively across the team. Care managers can also monitor the task completion performance of the team based on the pending and completed tasks, and analyze the care plan history to identify the areas that need attention.

**Where:** This change applies to Lightning Experience and all versions of the Salesforce app in Enterprise and Unlimited editions where Health Cloud is enabled.

**Who:** This feature is available to users with the Healthcare Intelligence or CRM Analytics for Health Cloud add-on license. Users with Healthcare Analytics Admin or Health Intelligence Admin permission sets can create, edit, and delete the app. Users with Healthcare Analytics User or Health Intelligence User permission sets can view the app dashboards.

**How:** From Setup, in the Quick Find box, enter *Enhanced Analytics for Healthcare*, and then select **Enhanced Analytics for Healthcare**. Follow the instructions on the page to set up Enhanced Analytics for Healthcare.

### SEE ALSO:

[Salesforce Help: Set up the Enhanced Analytics for Healthcare App](#)

[Salesforce Help: Get to Know the Enhanced Analytics for Healthcare App](#)

[Salesforce Help: Install the Enhanced Analytics for Healthcare App](#)

## Prioritize Payer Authorization Reviews Efficiently

Enhance operational efficiencies and expedite authorization request reviews by using the new personalized authorization request dashboards. Payer personas like Utilization Management nurses and Intake Specialists can get real-time insights into their open authorization requests and reviews based on status, due date, discharge schedules, and priority level. Clinical reviewers can use the new Approval Rate card to gain insights into the approval rate of the requesting medical provider based on the provider's prior request history.

**Where:** This change applies to Lightning Experience and all versions of the Salesforce app in Enterprise and Unlimited editions where Health Cloud is enabled.

**Who:** This feature is available to users with the Healthcare Intelligence or CRM Analytics for Health Cloud add-on license. Users with Healthcare Analytics Admin or Health Intelligence Admin permission sets can create, edit, and delete the app. Users with Healthcare Analytics User or Health Intelligence User permission sets can view the app dashboards.

**How:** From Setup, in the Quick Find box, enter *Enhanced Analytics for Healthcare*, and then select **Enhanced Analytics for Healthcare**. Follow the instructions on the page to set up the Enhanced Analytics for Healthcare app.

## Prioritize Provider Care Requests Efficiently

Healthcare providers can now use the new Care Request dashboard to process prior authorization requests logically and promptly and ensure timely patient care and support. By using the personalized dashboard, Auth coordinators can get a comprehensive overview of the open requests and reviews based on the due date, review status, and priority level.

**Where:** This change applies to Lightning Experience and all versions of the Salesforce app in Enterprise and Unlimited editions where Health Cloud is enabled.

**Who:** This feature is available to users with the Healthcare Intelligence or CRM Analytics for Health Cloud add-on license. Users with Healthcare Analytics Admin or Health Intelligence Admin permission sets can create, edit, and delete the app. Users with Healthcare Analytics User or Health Intelligence User permission sets can view the app dashboards.

**How:** From Setup, in the Quick Find box, enter *Enhanced Analytics for Healthcare*, and then select **Enhanced Analytics for Healthcare**. Follow the instructions on the page to set up the Enhanced Analytics for Healthcare app.

## Health Cloud Contact Center Enhancements

Quickly get all the information related to a member in one place in Health Cloud's Contact Center app. View a patient's health details in the advanced patient card, glance through recent engagements on the enhanced timeline, and verify a caller's identity and capture engagement details, all in the Contact Center app.

### IN THIS SECTION:

#### [Easily Set Up the Contact Center with the New Guided Setup](#)

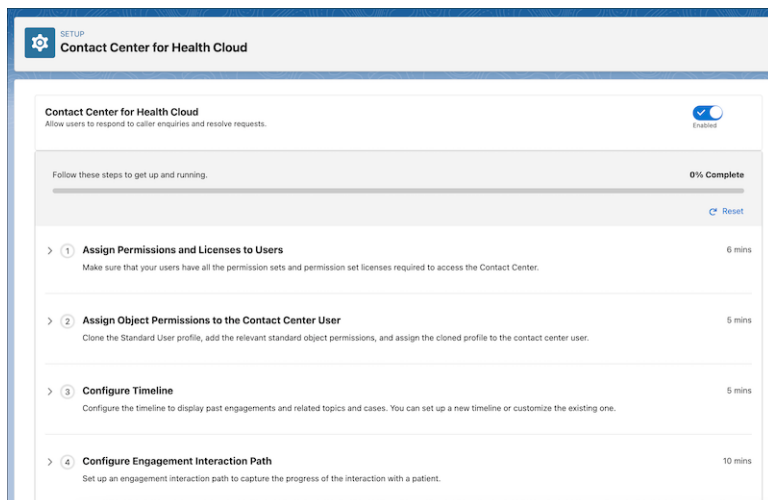
Follow the steps in the Contact Center's guided setup to easily configure the Contact Center app. The simplified tasks have in-app links that help you configure permissions and set up different components of the app, such as the timeline, engagement interaction paths, and knowledge articles. You can also make the app easily available to the users and verify steps that are automatically configured. Readily available links to help topics provide more context and guidance for each task.

## Easily Set Up the Contact Center with the New Guided Setup

Follow the steps in the Contact Center's guided setup to easily configure the Contact Center app. The simplified tasks have in-app links that help you configure permissions and set up different components of the app, such as the timeline, engagement interaction paths, and knowledge articles. You can also make the app easily available to the users and verify steps that are automatically configured. Readily available links to help topics provide more context and guidance for each task.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions of Salesforce with Health Cloud.

**How:** From Setup, go to Feature Settings. Under Health Cloud, select **Contact Center Settings**. Turn on the toggle to see the guided setup steps.



SEE ALSO:

[Salesforce Help: Contact Center for Health Cloud](#)

## Assessments Enhancements

Get a more holistic picture of a patient's health with easy-to-use health assessments. Use the power of OmniStudio and Discovery Framework to create custom assessments. Use the Guided Setup to get up and running with assessments. Navigate the assessment component easily with just two tabs instead of three. Patients can now receive email notifications with a link to complete their assessments in Experience Cloud.

These enhancements apply to the Assessments feature that uses Discovery Framework and OmniStudio. The Assessments feature from earlier releases is now Salesforce Surveys.

### IN THIS SECTION:

#### [Get Up and Running with Assessments by Using Guided Setup](#)

Use guided setup to configure Health Cloud Assessments efficiently. Follow the steps in the flow to complete tasks,, such as set up, permissions, add the Assessments component to a page, and customize the flow to send the notification email to patients. Stay on track with links to other in-app Setup pages and contextual Help.

#### [Navigate Assessments Component More Easily](#)

With fewer tabs and better filtering and sorting options, the Assessments component is now easier to navigate. Add the assessments component to a contact, account, or case page and easily access data to view patient health issues and to identify gaps in care.

#### [Send Patients Email Notifications of Assessments to Complete](#)

Care Coordinators can now use the Assessments component to notify patients about the assessments that need to be completed. The Salesforce admin customizes a prebuilt flow to send a secure email link. The patient uses the link in the email notification to access an Experience Cloud site and complete the assessments.

#### [Patients Can Complete Assessments in Experience Cloud Site](#)

Patients can now receive email notifications that they have assessments to be completed. The patient clicks a link in the email to access the Experience Cloud site as a guest user, completes the assigned assessments, and submits the responses.

#### [Give Patients the Option to Digitally Sign a Form](#)

Patients can now use their digital signature to authenticate their responses on a form. Use the new Signature element in the OmniScript and create a form.



## Get Up and Running with Assessments by Using Guided Setup

Use guided setup to configure Health Cloud Assessments efficiently. Follow the steps in the flow to complete tasks, such as set up, permissions, add the Assessments component to a page, and customize the flow to send the notification email to patients. Stay on track with links to other in-app Setup pages and contextual Help.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions with Health Cloud.

**Who:** Assessments are available to users with the OmniStudio User, Health Cloud Standard, Health Cloud Foundation, and Health Cloud permission set licenses, and the Industries Assessment permission set.

**How:** From Setup, in the Quick Find box, enter *Assessments*, and then select **Assessments**. Enable Assessments to view the Guided Setup flow.

SEE ALSO:

[Salesforce Help: Get Your Org Ready to Use Assessments](#)

## Navigate Assessments Component More Easily

With fewer tabs and better filtering and sorting options, the Assessments component is now easier to navigate. Add the assessments component to a contact, account, or case page and easily access data to view patient health issues and to identify gaps in care.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions with Health Cloud.

**Who:** Assessments are available to users with the OmniStudio User, Health Cloud Standard, Health Cloud Foundation, and Health Cloud permission set licenses, and the Industries Assessment permission set.

**How:** Install the OmniStudio package. Configure the Assessments component in Lightning App Builder. In the Properties pane, customize the Tab Label options and save your changes. You can also customize the fields shown in the list views of the Assessments component.

SEE ALSO:

[Salesforce Help: Add the Assessment Component to Patient Page](#)

## Send Patients Email Notifications of Assessments to Complete

Care Coordinators can now use the Assessments component to notify patients about the assessments that need to be completed. The Salesforce admin customizes a prebuilt flow to send a secure email link. The patient uses the link in the email notification to access an Experience Cloud site and complete the assessments.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions with Health Cloud.

**Who:** Assessments are available to users with the OmniStudio User, Health Cloud Standard, Health Cloud Foundation, and Health Cloud permission set licenses, and the Industries Assessment permission set.

**How:** Configure the Assessments component in Lightning App Builder. Customize the Send Assessment Email flow. Add to your existing site or set up a new Experience Cloud site for guest users. In the assessment component select the assessments to send to the patient and select **Send**.

SEE ALSO:

[Salesforce Help: Customize the Assessment Envelope Email Template Flow](#)

## Patients Can Complete Assessments in Experience Cloud Site

Patients can now receive email notifications that they have assessments to be completed. The patient clicks a link in the email to access the Experience Cloud site as a guest user, completes the assigned assessments, and submits the responses.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions with Health Cloud..

**Who:** Assessments are available to users with the OmniStudio User, Health Cloud Standard, Health Cloud Foundation, and Health Cloud permission set licenses, and the Industries Assessment permission set.

**How:** Customize the Send Assessment Email flow. Set up an Experience Cloud site for guest users. In the Assessment component care coordinators select the assessments and send the email notification to the patient.

SEE ALSO:

[Salesforce Help: Set Up Assessments for an Experience Cloud Site](#)

## Give Patients the Option to Digitally Sign a Form

Patients can now use their digital signature to authenticate their responses on a form. Use the new Signature element in the OmniScript and create a form.

**Where:** This change applies to Enterprise and Unlimited editions with the Health Cloud.

**Who:** This feature is available to users who are assigned the Health Cloud platform license and OmniStudio user permission set.

**How:** Open an OmniScript of type Discovery Framework. To add the Signature element to the OmniScript, from the Build panel, search for the Signature element. Then, from the search results, drag the element onto the OmniStudio Designer canvas.

## Medication Review and Medication Management Enhancements

Medication Management includes a new built-in flow to help your clinicians to save time and reduce manual errors when adding patient's medications.

IN THIS SECTION:

[Add Medications Faster with the New Add Basic Medication Details Flow](#)

Make it easier for clinicians to quickly add multiple medications for their patients by using the single-step version of the existing Add Patient Medication flow. The new and simplified Add Basic Medication Details flow is integrated with RxNorm and the Patient Medication Manager lightning component.

### Add Medications Faster with the New Add Basic Medication Details Flow

Make it easier for clinicians to quickly add multiple medications for their patients by using the single-step version of the existing Add Patient Medication flow. The new and simplified Add Basic Medication Details flow is integrated with RxNorm and the Patient Medication Manager lightning component.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions of Health Cloud where person accounts are enabled.

**Why:** In the Patient Medication Manager component, a clinician selects a branded or generic medication and adds it to a patient record. They can check back later to add the medication details.

**How:** Edit a person account's Lightning record page, and select the Patient Medication Manager component. In the Properties pane, from the Add Medication Flow list, select **Add Basic Medication Details**.

SEE ALSO:

[Salesforce Help: Configure the Add Basic Medication Details Flow](#)

[Salesforce Help: Add Medications by Using the Add Basic Medication Details Flow](#)

## Provider Search Enhancements

When viewing provider search results, you can now select multiple providers and generate a shareable PDF report. Guest users can search for providers on an Experience Cloud site.

IN THIS SECTION:

[Generate Search Reports with the Enhanced Provider Search](#)

Select up to 50 records from provider search results. Copy and paste the selected records or generate a PDF report. Download the report, or create a public link to share as needed.

[Provider Search Available to Guest Users](#)

Patients can now search for providers on an Experience Cloud site as a guest user.

## Generate Search Reports with the Enhanced Provider Search

Select up to 50 records from provider search results. Copy and paste the selected records or generate a PDF report. Download the report, or create a public link to share as needed.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions with Health Cloud.

**Who:** This feature is available to users with the Health Cloud Foundation permission set and the DocGen Designer permission set license.

**How:** From Setup, in the Quick Find box, enter *Document Generation Settings*, then select **Document Generation Settings**. Make sure you have a Document Template Library with a PDF preview type and **ServerSide Docgen Enabled** selected.

SEE ALSO:

[Salesforce Help: Enable Users to Generate Provider Search Reports](#)

[Salesforce Help: OmniStudio Document Generation Document Templates](#)

## Provider Search Available to Guest Users

Patients can now search for providers on an Experience Cloud site as a guest user.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited Editions with Health Cloud.

**Who:** This feature is available to users with the Customer Community Plus for Health Cloud or Customer Community for Health Cloud add-on licenses. Provider Search is available to guest users.

**How:** Set up an Experience Cloud site with the Provider Search component. Set up object access, sharing rules, and permissions for your Experience Cloud guest user.

SEE ALSO:

[Salesforce Help: Enable Guest Users to Search for Providers](#)

## Actionable Relationship Center Enhancements

Add the Actionable Relationship Center (ARC) component to patient page layouts to show the complex relationships between patients and other people and organizations in healthcare.

### IN THIS SECTION:

#### [Track Complex Household Roles and Relationships in Health Cloud](#)

Visualize a patient's multiple relationships in the updated Household data model. You can record the groups and households that a patient is a member of, the different accounts and contacts they're related to, and their roles in each of these relationships.

#### [View an Actionable Graph of Patient Relationships in Health Cloud](#)

Explore multiple layers of a patient's connections with other people, providers, and caregivers with Actionable Relationship Center (ARC). With two prebuilt templates, Patient Relationship and Healthcare Practitioner, ARC provides an advanced visualization and a holistic view of a patient.

## Track Complex Household Roles and Relationships in Health Cloud

Visualize a patient's multiple relationships in the updated Household data model. You can record the groups and households that a patient is a member of, the different accounts and contacts they're related to, and their roles in each of these relationships.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions where Health Cloud is provisioned.

**Who:** This feature is available only to users who have the Health Cloud Foundation user permission set and Group Membership Settings enabled.

**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.

## View an Actionable Graph of Patient Relationships in Health Cloud

Explore multiple layers of a patient's connections with other people, providers, and caregivers with Actionable Relationship Center (ARC). With two prebuilt templates, Patient Relationship and Healthcare Practitioner, ARC provides an advanced visualization and a holistic view of a patient.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions with Health Cloud.

**Who:** The Patient Relationship template is available to users with the Health Cloud Foundation license who have Person Accounts, Contacts to Multiple Accounts, and Group Membership Settings enabled. The Healthcare Practitioner template is available to users with the Health Cloud Foundation license who have Person Accounts enabled.

**How:** From Setup, in the Quick Find box, enter *Actionable Relationship Center*, and then select **Actionable Relationship Center**. Select **New Relationship Graph** and then select a Health Cloud graph template. Create the graph and then add the ARC Relationship Graph component to a patient record page.

### SEE ALSO:

[Salesforce Help: Set Up the Actionable Relationship Center in Health Cloud](#)

## Intelligent Document Automation Enhancements

Simplify the document management process by relating received documents to multiple records in one screen. An increase in TextTract page limits increases efficiency by allowing more page uploads at once. Increase efficiency by having patients upload their own documents on an Experience Cloud site.

### IN THIS SECTION:

#### [Relate Multiple Records to a Document](#)

Simplify the document management process by using Intelligent Document Automation for Health Cloud. After uploading documents, in a single screen, you can create multiple record associations with the document you uploaded.

#### [Upload Documents in Experience Cloud with Intelligent Document Automation](#)

Set up permission sets for patients to upload their own documents. Save time in your intake procedures by having the patients submit documents on your Experience Cloud site

#### [Increased TextTract Page Limit for Intelligent Document Reader](#)

The TextTract page limit for Intelligent Document Reader is increased to 20, with a default value of 10.

## Relate Multiple Records to a Document

Simplify the document management process by using Intelligent Document Automation for Health Cloud. After uploading documents, in a single screen, you can create multiple record associations with the document you uploaded.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions with Health Cloud.

**Who:** Intelligent Document Automation is available to users with the Health Cloud Foundation, Intelligent Document Workspace User, and Document Checklist permissions.

**How:** From App Picker, click **Received Documents**. Select a document and click **Transform Document**. Click **Add New Associated Record** to relate multiple records to the documents.

### SEE ALSO:

[Salesforce Help: Intelligent Document Automation on Experience Cloud Sites](#)

## Upload Documents in Experience Cloud with Intelligent Document Automation

Set up permission sets for patients to upload their own documents. Save time in your intake procedures by having the patients submit documents on your Experience Cloud site

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions where Health Cloud is enabled.

**Who:** Intelligent Document Automation on Experience Cloud is available to authenticated users with Intelligent Document Workspace for Experience Cloud Users permission set.

**How:** Set up an Experience Cloud site with the Intelligent Document Automation component. Set up permission sets for your portal users to access objects to relate to their uploaded documents.

### SEE ALSO:

[Salesforce Help: Intelligent Document Automation on Experience Cloud Sites](#)

## Increased TextTract Page Limit for Intelligent Document Reader

The TextTract page limit for Intelligent Document Reader is increased to 20, with a default value of 10.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions where Health Cloud is enabled.

**Who:** Intelligent Document Reader is available to users with Health Cloud Foundation and Document Checklist permissions.

**How:** From Setup, in the Quick Find box, enter *Intelligent Document Reader*, and then select **Intelligent Document Reader**. In the Global Content Extraction Settings section, click **Edit Settings**. Enter the maximum number of consecutive pages from the first page of a document that you want to send for content extraction at a time.

## Virtual Care Enhancements

Virtual Care is now available in more countries. You can now add a calendar file to an appointment notification email to increase appointment attendance.

### IN THIS SECTION:

#### [Include Calendar Files in Virtual Care Emails](#)

Improve patient attendance by building a flow that adds a calendar file (.ics) attachment to Virtual Care emails.

#### [Use Virtual Care in Additional Countries](#)

Virtual Care is now available in more countries. It was available in Australia, Spain, the United Kingdom, and the United States. Now Virtual Care is also available in Brazil, Canada (except Ontario), France, Ireland, Israel, Japan, Mexico, New Zealand, and Switzerland.

## Include Calendar Files in Virtual Care Emails

Improve patient attendance by building a flow that adds a calendar file (.ics) attachment to Virtual Care emails.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions with Health Cloud and the Video Calls add-on license. Enabling Virtual Calls requires a separate Amazon account.

**Who:** Virtual Care is available to moderators with the Health Cloud Foundation license and the Health Cloud Video Calls permission set.

**How:** Create a flow that retrieves the recipient names and email addresses from a Service Appointment object. Add the sendMessage action to your flow and configure the email message.

### SEE ALSO:

[Salesforce Help: Create a Flow to Add a Calendar File to an Appointment](#)

## Use Virtual Care in Additional Countries

Virtual Care is now available in more countries. It was available in Australia, Spain, the United Kingdom, and the United States. Now Virtual Care is also available in Brazil, Canada (except Ontario), France, Ireland, Israel, Japan, Mexico, New Zealand, and Switzerland.

**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 in select countries. 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.

### SEE ALSO:

[Salesforce Help: Virtual Care Availability by Country](#)

## Salesforce Scheduler Enhancements

Now you can book assets with Salesforce Scheduler in Health Cloud. There are also new usage limits for Salesforce Scheduler.

### IN THIS SECTION:

#### [Manage Appointments and Assets with Salesforce Scheduler](#)

Starting with Summer '23, Salesforce Scheduler can be used to schedule assets in Health Cloud. With the Salesforce Scheduler add-on license, users are entitled to 12,000 appointments per org per year. In addition to the entitlement per org, 300 appointments are available per user license per year for the Enterprise Edition licenses. For Unlimited Edition licenses, the limit increases to 600 appointments per user license per year.

### Manage Appointments and Assets with Salesforce Scheduler

Starting with Summer '23, Salesforce Scheduler can be used to schedule assets in Health Cloud. With the Salesforce Scheduler add-on license, users are entitled to 12,000 appointments per org per year. In addition to the entitlement per org, 300 appointments are available per user license per year for the Enterprise Edition licenses. For Unlimited Edition licenses, the limit increases to 600 appointments per user license per year.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions where Health Cloud is enabled with Salesforce Scheduler.

### SEE ALSO:

[Salesforce Help: Enable Asset Scheduling in Salesforce Scheduler](#)

## New and Changed Health Cloud Metadata Types

Make the most of the new and changed metadata types of Health Cloud.

### Metadata Type

#### **Set up the limits on benefits provision**

Use the new CareLimitType metadata type. Introduced in API version 52.0, this type has been added to the *Health Cloud Developer Guide*.

#### **Configure settings for benefit verification requests**

Use the new CareBenefitVerifySettings metadata type. Introduced in API version 52.0, this type has been added to the *Health Cloud Developer Guide*.

#### **Create a record type for care-related requests**

Use the new CareRequestConfiguration metadata type. Introduced in API version 44.0, this type has been added to the *Health Cloud Developer Guide*.

#### **Configure explainability message templates for a specified step element type**

Use the new ExplainabilityMsgTemplateFieldTranslation subtype of the existing Translations metadata type.

#### **Translate the UI components associated with identity verification fields**

Use the new IdentityVerificationFieldTranslation subtype of the existing Translations metadata type. Introduced in API version 54.0, this type has been added to the *Industries Common Resources Developer Guide*.

## Health Cloud Has New and Changed Objects

Store and access more data with these new and changed Health Cloud objects.

**Where:** This change applies to Enterprise and Unlimited editions.

### Home Health

**Associate a service request with a series of recurring visits**

Use the new `CareServiceVisitPlan` object.

**Associate a service request with a service appointment**

Use the new `CareServiceVisit` object.

**Add a patient's preferences for their home healthcare services**

Use the new `AccountServicePreference` object.

### Advanced Therapy Management

**Store information about the work order that's executed for the care program enrollee**

Use the new `CarePgmEnrolleeWorkOrder` object.

**Store information about the step in a work order that's executed for the care program enrollee**

Use the new `CarePgmEnrolleeWorkOrderStep` object.

**Represent the team of members associated with an organization**

Use the new `Team` object.

**Represent the member associated with a team**

Use the new `TeamMember` object.

**Represent the flow definition that's associated with the work procedure step**

Use the new `AssociatedFlowName` field in the `WorkProcedureStep` object.

**Represent the work order being executed for the care program enrollee**

Use the new `CurrentWorkOrderId` field in the `CareProgramEnrollee` object.

**Represent the work order step being executed for the care program enrollee**

Use the new `CurrentWorkOrderStepId` field in the `CareProgramEnrollee` object.

**Represent the flow orchestrator API name associated with the work procedure**

Use the new `AssociatedFlowOrchestratorName` field in the `WorkProcedure` object.

**Represent the team associated with the service territory for a specific work type**

Use the new `TeamId` field in the `ServiceTerritoryWorkType` object.

**Represent the user or user group that's assigned an assessment task**

Use the new `AssignedToId` field in the `AssessmentTask` object.

**Represent the record in the reference object that's associated with an assessment task**

Use the new `ReferenceRecordId` field in the `AssessmentTask` object.

**Represent the participant role that's associated with a component task**

Use the new `ParticipantRoleId` field in the `OtherComponentTask` object.

**Represent the participant role that's associated with a record action**

Use the new `ParticipantRoleId` field in the `RecordAction` object.



## Utilization Management

### Store information about errors that occur when processing an authorization request

Use the new `CareProcessingError` object.

### Represent the type of reference case that's associated with the care request extension

Use the new `ReferenceCaseType` field in the `CareRequestExtension` object.

### Represent the code set that defines the requested drug

Use the new `DrugCodeId` field in the `CareRequestDrug` object.

## Integrated Care Management

### Associate a care plan activity with its related Task record

Use the new `TaskId` field on the `CarePlanActivity` object.

### Specify the job status of a task in a care plan

Use the new `TaskJobStatus` field on the `CarePlanDetail` object.

### View the message associated a task job status in a care plan

Use the new `TaskJobStatusMessage` field on the `CarePlanDetail` object.

### Add a description to a care barrier

Use the new `Description` field on the `CareBarrier` object.

### Reference a problem definition that a care barrier is related to or created from

Use the new `ProblemDefinitionId` field on the `CareBarrier` object.

## Crisis Support Center Management

### Represent information related to different bed types at a facility with associated care programs and products

Use the new `CareFacilityBedobject`.

#### SEE ALSO:

[Developer Guide: Utilization Management Data Model](#)

[Developer Guide: Advanced Therapy Management Data Model](#)

[Developer Guide: Crisis Support Center Management Data Model](#)

[Developer Guide: Integrated Care Management Data Model](#)

## New Invocable Actions in Health Cloud

Use the new invocable actions for Health Cloud.

### Send an email with a calendar (.ics) file with Service Appointment details

Use the new `sendMessage` action.

### Generate an assessment envelope signature based on the specified envelope record ID

Use the new `assessmentEnvelopeSignature` action.

**Create a care program enrollee work order step record**

Use the new `createCareProgramEnrolleeWorkOrderStep` action.

SEE ALSO:

[Salesforce Help: Invocable Actions](#)

[Developer Guide: Invocable Actions](#)

## Insurance

Insurance connects frontline agents, back-office teams, and customers with flexible components that support policy administration, benefit administration, claims, and billing.

Learn about what's in the Summer '23 release in the [Insurance Summer '23 Release Notes](#).

## Loyalty Management

Easily scan your loyalty program's promotions and events on the Promotion Calendar. Automate the selection of members for tier upgrade assessment and tier change for eligible members. Consolidate members' fixed non-qualifying points in real time. Automate the processes to filter ineligible transactions, redeem vouchers, and allow members to opt out of promotions. Provide partners permissions to add their program data from an Experience Cloud site.

### IN THIS SECTION:

#### [View Promotions and Events on a Single Calendar](#)

Visualize all the promotions and events that are running on a particular date or across a period on the Promotion Calendar. Easily identify white spaces and create promotions or events without navigating away from the calendar. Use filters to zero in on particular promotions.

#### [Tier Management](#)

Program managers can now create a tier assessment process by deciding the eligible point balance for each tier. Automate the selection of members for tier upgrade assessment when their qualifying point balance changes.

#### [Save Time and Effort With Loyalty Management Mobile SDK](#)

Experience Loyalty Management on your iOS and Android mobile devices and use the mobile Software Development Kit's (SDK) capabilities to build custom mobile applications with unique user experiences. Use prebuilt loyalty components to build your own apps or to enhance your existing mobile apps. Build the SDK so that your loyalty program members can view their profile, membership details, and benefits, enroll for promotions, and avail vouchers.

#### [Consolidate Member Points in Real Time](#)

You no longer need to schedule a Data Processing Engine definition to consolidate members' fixed non-qualifying points for expiration. Now you can consolidate points by currency and expiration date as soon as they're credited to members.

#### [Promotion Setup](#)

Filter ineligible transactions by adding conditions to loyalty program processes. Allow members to opt out of promotions from external sites. Use the Redeem Voucher action to process voucher redemptions by members.

#### [Give Partners Permissions to Edit Their Program Data](#)

Provide your partners access to manage their program data from an Experience Cloud site. For example, let partners create transaction journals when members purchase a partner product, edit member profiles, and adjust member points.

### [Give Members a Personalized Experience with the Enhanced Loyalty Management Data Bundle](#)

With more objects added to the Loyalty Management data bundle in Data Cloud, get a granular understanding of your members when creating customer segments for personalized marketing journeys.

### [Provide Customers the Flexibility to Join or Leave Programs and Promotions at Any Time](#)

Let customers and members join or opt out of loyalty programs and promotions from your Experience Cloud site. Turn on a setting to give members Create access for the Account, Contact, and Loyalty Program Member Promotion objects, and Read access for the Loyalty Program Process Rules object.

### [Execute More Business API Requests with Expanded Limits](#)

Increase the number of web pages where your loyalty program's data appears or where members can interact with the loyalty program. You can now execute 500,000 Post requests and 500,000 Get requests per hour for the Loyalty Management Business APIs.

### [Other Changes in Loyalty Management](#)

Get an improved user experience with the Quick Promotion Wizard. The "Consolidate member points for expiration" setting is now called "Consolidate members' fixed non-qualifying points in batches." Get the code and the ID of issued vouchers from the output parameters of the Issue Voucher action in loyalty program process rules.

### [Watch Loyalty Management Videos](#)

New videos help your users learn about the capabilities of Loyalty Management.

### [Changed Objects in Loyalty Management](#)

Do more with the updated Loyalty Management objects.

### [New and Changed Loyalty Management Metadata Types](#)

Make the most of the new and changed metadata types in Loyalty Management.

### [New Connect REST APIs](#)

Connect REST APIs help customers, partners, and ISVs integrate with Salesforce software and UIs.


### [Changed Connect REST API Response Bodies](#)

These response bodies have changes.

## View Promotions and Events on a Single Calendar

Visualize all the promotions and events that are running on a particular date or across a period on the Promotion Calendar. Easily identify white spaces and create promotions or events without navigating away from the calendar. Use filters to zero in on particular promotions.

**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:** On a loyalty program record, click **Loyalty Experiences**. On the Promotions related list, click  and select **Open Calendar**.

Promotion Calendar

New

Refresh

Start Date

Today

Apr 2, 2023

Period

<

>

7 Days

Group Promotions By

None

Sun, Apr 02

Mon, Apr 03

Tue, Apr 04

Wed, Apr 05

Thu, Apr 06

Fri, Apr 07

Sat, Apr 08

12 AM

12 PM

12 AM

12 PM

12 AM

12 PM

12 AM

12 PM

12 AM

12 PM

12 AM

12 PM

▼ All Promotions

(8 Promotions)

GO

Great outdoor

Redemption · Liability Achieved: 123

Great outdoor

Active: No · End Date: 2023-06-15

DP

Double Point Promotion

Accrual · Liability Achieved: 3500

Double Point Promotion

Active: No · End Date: 2023-06-16

MB

Monsoon Bonanza

Redemption · Liability Achieved: 200

Monsoon Bonanza

Active: Yes · End Date: 2023-05-01

C1

Complete Survey, Get 100

Complete Survey, Get 100

Active: No

LS

Limited-time sale

Redemption

Limited-time sale

Active: No · End Date: 2023-06-15

EL

Exclusive Product Launch

Accrual

Exclusive Product Launch

Active: Yes

BA

Birthday Give Away

Accrual

Birthday Give Away

Active: Yes · End Date: 2023-06-16

SS

\$10 off on Level X Shoes

Accrual

\$10 off on Level X Shoes

Active: Yes

SEE ALSO:

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

## Tier Management

Program managers can now create a tier assessment process by deciding the eligible point balance for each tier. Automate the selection of members for tier upgrade assessment when their qualifying point balance changes.

### IN THIS SECTION:

#### [Automate Tier Assessment for Members](#)

Program managers can decide the minimum qualifying point balance that members require to be eligible for each tier of a loyalty program and generate a tier assessment process. The process assesses each member's balance and then automatically changes the member's tier.

#### [Automate Member Selection for Tier Assessment](#)

Reduce the number of tasks you need to complete to set up a tier upgrade assessment process. Now, you can turn on a setting to automatically select members for tier upgrade assessment. Each time a member's qualifying point balance changes, the member is automatically selected for tier upgrade assessment. You can assess and upgrade the tiers of the selected members.

### Automate Tier Assessment for Members

Program managers can decide the minimum qualifying point balance that members require to be eligible for each tier of a loyalty program and generate a tier assessment process. The process assesses each member's balance and then automatically changes the member's tier.

**Where:** This change applies to Lightning Experience in Developer, Enterprise, Performance, and Unlimited editions where Loyalty Management is enabled.

**How:** On the tier group record of your loyalty program, click **Manage Tier Eligibility**. Enter the minimum point balance required for each tier, and click **Create Rule**.

Manage tier eligibility

Qualifying Currency

Tier Points

Tier	Eligible Balance
1 Silver	0
2 Gold	500
3 Platinum	2500

Cancel

Create Rule

SEE ALSO:

[Salesforce Help: Configure a Tier Assessment Process \(can be outdated or unavailable during release preview\)](#)

Automate Member Selection for Tier Assessment

Reduce the number of tasks you need to complete to set up a tier upgrade assessment process. Now, you can turn on a setting to automatically select members for tier upgrade assessment. Each time a member’s qualifying point balance changes, the member is automatically selected for tier upgrade assessment. You can assess and upgrade the tiers of the selected members.

**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 **Select Members for Tier Assessment Automatically**.

Select Members for Tier Assessment Automatically

Automate the process of selecting members who are eligible for tier assessment. After you enable this setting, members with a changed qualifying point balance are eligible for tier assessment.

Enabled

To automate the process of upgrading the tier of eligible members, specify the eligible qualifying currency balance required by members for each tier in the loyalty program’s tier group.

SEE ALSO:

[Salesforce Help: Select Members for Tier Upgrade Automatically \(can be outdated or unavailable during release preview\)](#)

## Save Time and Effort With Loyalty Management Mobile SDK

Experience Loyalty Management on your iOS and Android mobile devices and use the mobile Software Development Kit's (SDK) capabilities to build custom mobile applications with unique user experiences. Use prebuilt loyalty components to build your own apps or to enhance your existing mobile apps. Build the SDK so that your loyalty program members can view their profile, membership details, and benefits, enroll for promotions, and avail vouchers.

**Where:** This feature is available in Lightning Experience in all editions.

**How:** Install the Loyalty Management Mobile SDK on your iOS and Android mobile devices, create a connected app, and then clone the GitHub repository. The SDK is bundled with a ready-to-use sample app that is embedded with the Loyalty Management features.

### SEE ALSO:

[Loyalty Management Developer Guide: Loyalty Management Mobile SDK for iOS Development \(can be outdated or unavailable during release preview\)](#)

[Loyalty Management Developer Guide: Loyalty Management Mobile SDK for Android Development \(can be outdated or unavailable during release preview\)](#)

## Consolidate Member Points in Real Time

You no longer need to schedule a Data Processing Engine definition to consolidate members' fixed non-qualifying points for expiration. Now you can consolidate points by currency and expiration date as soon as they're credited to members.

**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 **Consolidate members' fixed non-qualifying points in real time**.

## Consolidate Member Points for Expiration

Consolidate members' fixed non-qualifying points in batches.

Disabled

Consolidate members' fixed non-qualifying points in real time.

Enabled

Turn on either of these settings to create consolidated records for members' fixed non-qualifying points that expire on a specific date. When these settings are enabled, the points expiration process uses the loyalty aggregated points expiration ledger instead of loyalty ledgers to expire points. If you consolidate points in real-time, loyalty aggregated points expiration ledgers are created and updated when points are credited or debited. If you consolidate points in batches, admins must use Data Processing Engine definitions to create and update loyalty aggregated points expiration ledgers. After you turn on these settings, you can't use the Expire Fixed Non-Qualifying Points template to expire fixed non-qualifying points for members.

## SEE ALSO:

[Salesforce Help: Enable Consolidation of Fixed-Type, Non-Qualifying Points of Members in Real Time](#) (can be outdated or unavailable during release preview)

[Salesforce Help: Consolidation of Fixed-Type, Non-Qualifying Points for Expiration](#) (can be outdated or unavailable during release preview)

## Promotion Setup

Filter ineligible transactions by adding conditions to loyalty program processes. Allow members to opt out of promotions from external sites. Use the Redeem Voucher action to process voucher redemptions by members.

## IN THIS SECTION:

### [Filter Ineligible Transactions with Ease](#)

You no longer have to use conditions in each rule to filter out ineligible transaction journals. Define the eligibility conditions for a process and transactions that don't meet the eligibility conditions are automatically filtered out. For example, you can add eligibility conditions to filter out inactive member transactions that are less than a particular amount. When you add an eligibility condition to the process, it filters out transactions that are less than the specified amount.

### [Let Members Opt Out of Promotions Easily](#)

Use the Opt Out Of Promotions template to create a process that lets members opt out of a promotion from your loyalty program's website, mobile app, or your ecommerce site.

### [Design the Process for Redeeming Vouchers](#)

Design a process for voucher redemptions based on your loyalty program's unique requirements in Promotion Setup. Add conditions to the process to check whether the voucher is applicable for the member's order. For example, you can add conditions to check whether the voucher is valid for the purchased product or for the store from which the product was purchased.

## Filter Ineligible Transactions with Ease

You no longer have to use conditions in each rule to filter out ineligible transaction journals. Define the eligibility conditions for a process and transactions that don't meet the eligibility conditions are automatically filtered out. For example, you can add eligibility conditions to filter out inactive member transactions that are less than a particular amount. When you add an eligibility condition to the process, it filters out transactions that are less than the specified amount.

**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:** On a loyalty program record, click **Loyalty Processes**. From the Loyalty Program Processes related list, open the rule that you want to add conditions to, and click **Define Process Eligibility**. Select **Enable process eligibility conditions**. Add your process eligibility conditions and save your changes.

**Define process eligibility**

☒ **Enable process eligibility conditions**  
 Process eligibility conditions determine which transactions are eligible for the loyalty program process. Enable process eligibility conditions to add your conditions. Disable process eligibility conditions if you don't want to filter transactions based on your conditions.

**Eligibility Criteria**  
 All Conditions Are Met (AND)

* Resources	* Operator	* Type	* Value
TransactionJournal > Transa... X	Equals	Fixed V...	500.00
<b>AND</b>			
MemberStatus_Member X	Equals	Fixed V...	Active

+ Add Condition

Cancel Save

SEE ALSO:

[Salesforce Help: Define Eligibility Conditions for a Process \(can be outdated or unavailable during release preview\)](#)

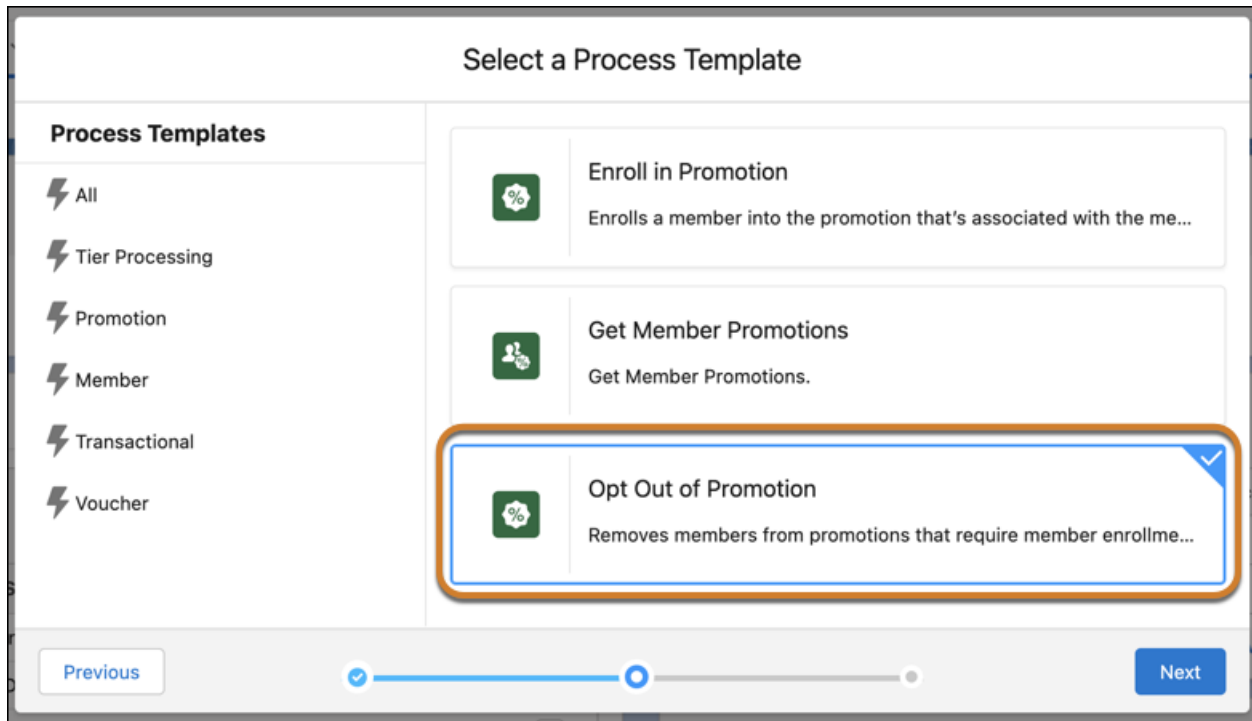
## Let Members Opt Out of Promotions Easily

Use the Opt Out Of Promotions template to create a process that lets members opt out of a promotion from your loyalty program's website, mobile app, or your ecommerce site.

**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:** Create a process using the Opt Out Of Promotions template. Customize the process based on your requirements and activate it. Developer can use the Opt Out of Promotion Business API to integrate the process with an external site component that lets members opt out of promotions.





SEE ALSO:

[Salesforce Help: Opt Out of Promotion Process Template \(can be outdated or unavailable during release preview\)](#)

## Design the Process for Redeeming Vouchers

Design a process for voucher redemptions based on your loyalty program's unique requirements in Promotion Setup. Add conditions to the process to check whether the voucher is applicable for the member's order. For example, you can add conditions to check whether the voucher is valid for the purchased product or for the store from which the product was purchased.

**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 Rules Builder, click . Select **Add Action** > **Redeem Voucher**.

The screenshot shows the 'New Action' configuration interface for the 'Redeem Voucher' action. The header includes a back arrow, a menu icon, the title 'New Action', and the subtitle 'Redeem Voucher'. Below the header, there is a section for 'Action Name' with a text input field containing 'Redeem Voucher Used for Product Purchase'. The main configuration area is divided into two sections: 'Input Parameters' and 'Output Parameters'. The 'Input Parameters' section has a table with two columns: 'Input Parameters' and 'Value'. It contains three rows: 'Voucher Code' with a value of 'TransactionJournal > VoucherCode', 'Amount to Redeem' with a placeholder 'Enter a value or select a parameter...', and 'Voucher Number' with a placeholder 'Enter a value or select a parameter...'. The 'Output Parameters' section also has a table with two columns: 'Output Parameters' and 'Value'. It contains one row: 'Remaining Amount' with a placeholder 'Select a parameter...'. At the bottom of the form, there are 'Cancel' and 'Done' buttons.

Input Parameters	Value
* Voucher Code	TransactionJournal > VoucherCode
Amount to Redeem	Enter a value or select a parameter...
Voucher Number	Enter a value or select a parameter...

Output Parameters	Value
Remaining Amount	Select a parameter...

SEE ALSO:

[Salesforce Help: Loyalty Program Process Rule Actions](#) (can be outdated or unavailable during release preview)

## Give Partners Permissions to Edit Their Program Data

Provide your partners access to manage their program data from an Experience Cloud site. For example, let partners create transaction journals when members purchase a partner product, edit member profiles, and adjust member points.

**Where:** This change applies to Lightning Experience in Developer, Enterprise, Performance, and Unlimited editions where Loyalty Management is enabled.

**Who:** To manage their program data, partners must have the Loyalty Management permission set assigned.

**How:** Clone and edit one of these profiles to provide access to Loyalty Management objects based on your partner's requirements.

- Channel Partner Community
- Customer Community Login User
- Customer Community Plus Login User
- Customer Community Plus User
- Customer Community User
- Partner Community Login User
- Partner Community User

SEE ALSO:

[Salesforce Help: Experience Cloud Site Access for Partners](#) (can be outdated or unavailable during release preview)

## Give Members a Personalized Experience with the Enhanced Loyalty Management Data Bundle

With more objects added to the Loyalty Management data bundle in Data Cloud, get a granular understanding of your members when creating customer segments for personalized marketing journeys.

**Where:** This change applies to Lightning Experience in Developer, Enterprise, Performance, and Unlimited editions where Loyalty Management and Data Cloud are enabled.

**Who:** To use an object from the Loyalty Management data bundle, users need the Loyalty Management permission set and Read and View All access to the Loyalty Management object.

**Why:** The Loyalty Management data bundle in Data Cloud now includes these objects.

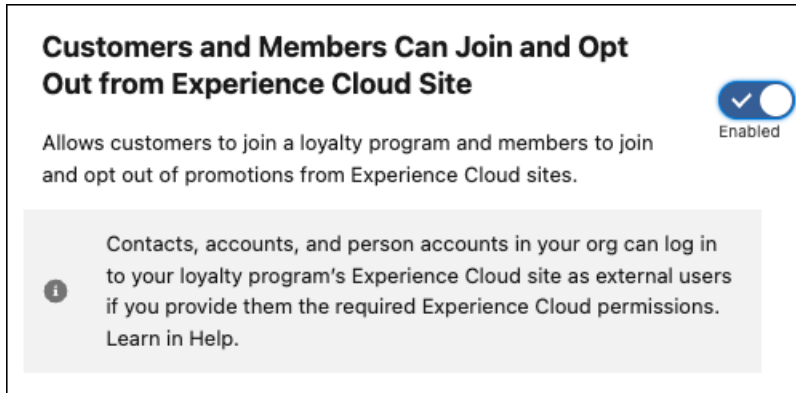
- Product Category
- Market Segment
- Loyalty Program Member Attribute Value
- Loyalty Aggregated Point Expiration Ledger
- Unit Of Measure
- Loyalty Program Engagement Attribute
- Product
- Loyalty Program Member Case
- Loyalty Program Partner Promotion
- Loyalty Program Member Badge
- Loyalty Program Badge
- Promotion Market Segment
- Loyalty Program Engagement Attribute Promotion
- Loyalty Program Group Member Relationship

## Provide Customers the Flexibility to Join or Leave Programs and Promotions at Any Time

Let customers and members join or opt out of loyalty programs and promotions from your Experience Cloud site. Turn on a setting to give members Create access for the Account, Contact, and Loyalty Program Member Promotion objects, and Read access for the Loyalty Program Process Rules object.

**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 **Customers and Members Join and Opt Out from Experience Cloud Site**.



SEE ALSO:

[Salesforce Help: Allow Members to Join and Leave Loyalty Program and Promotions from Experience Cloud Site \(can be outdated or unavailable during release preview\)](#)

## Execute More Business API Requests with Expanded Limits

Increase the number of web pages where your loyalty program's data appears or where members can interact with the loyalty program. You can now execute 500,000 Post requests and 500,000 Get requests per hour for the Loyalty Management Business APIs.

**Where:** This change applies to Lightning Experience in Developer, Enterprise, Performance, and Unlimited editions where Loyalty Management is enabled.

SEE ALSO:

[Loyalty Management Developer Guide: Loyalty Management Business API Resources \(can be outdated or unavailable during release preview\)](#)

## Other Changes in Loyalty Management



Get an improved user experience with the Quick Promotion Wizard. The "Consolidate member points for expiration" setting is now called "Consolidate members' fixed non-qualifying points in batches." Get the code and the ID of issued vouchers from the output parameters of the Issue Voucher action in loyalty program process rules.

**Where:** This change applies to Lightning Experience in Developer, Enterprise, Performance, and Unlimited editions where Loyalty Management is enabled.

## Watch Loyalty Management Videos

New videos help your users learn about the capabilities of Loyalty Management.

- [Take a Tour of Promotion Setup](#) gives an overview of the Promotion Setup capabilities and shows how quickly you can set up a process.
- [Process Member Redemptions using Promotion Setup in Loyalty Management](#) shows how you can set up a process to debit points for member purchases using a loyalty program process template in Promotion Setup.
- [Use Loyalty Management Promotion Setup to Reward Members for Purchases](#) shows how you can extend a loyalty program process to reward members for their purchases.

-  [Track the Performance of Your Promotions with CRM Analytics](#) how your company's leadership and loyalty program managers can use Promotion Performance Dashboard to track how successful your promotions are.
-  [Design Loyalty Engagement Widgets As Per Your Company's Branding](#) shows how you can design and preview widgets to suit your company's branding requirements.

## Changed Objects in Loyalty Management

Do more with the updated Loyalty Management objects.

### Specify the minimum and maximum points balance that members require to be eligible for a tier

Use the new `MinimumEligibleBalance` and `MaximumEligibleBalance` fields of the `LoyaltyTier` object.

### Select the qualifying currency that's used to assess and assign tiers to members

Use the new `TierAssessmentCurrencyId` field of the `LoyaltyTierGroup` object.

### View the location of a promotion's image

Use the new `PromotionImageUrl` field of the `LoyaltyPgmMbrPromEligView` object.

### Create processes that allow members to opt out of promotions

Use the new `OptOutPromotion` value in the `ProcessType` field of the `LoyaltyProgramProcess` object.

### BEHAVIORCHANGE: ProgramId, TemplateName, and TemplateVersion are no longer editable on the LoyaltyProgramWidget object

You can't edit the loyalty program, template, and template version associated with widgets.

#### SEE ALSO:

[Loyalty Management Developer Guide: LoyaltyTier](#) (can be outdated or unavailable during release preview)

[Loyalty Management Developer Guide: LoyaltyTierGroup](#) (can be outdated or unavailable during release preview)

[Loyalty Management Developer Guide: LoyaltyPgmMbrPromEligView](#) (can be outdated or unavailable during release preview)

[Loyalty Management Developer Guide: LoyaltyProgramProcess](#) (can be outdated or unavailable during release preview)

[Loyalty Management Developer Guide: LoyaltyProgramWidget](#) (can be outdated or unavailable during release preview)

## New and Changed Loyalty Management Metadata Types

Make the most of the new and changed metadata types in Loyalty Management.

### Settings

#### Consolidate members' fixed-type non-qualifying points for expiration in real time

Use the new `enableNonQualifyingPointsConsolidation` field on the `IndustriesLoyaltySettings` metadata type.

#### Automatically select members with a change in qualifying points balance for tier assessment

Use the new `enableAutomaticMemberTierAssessmentSelection` field on the `IndustriesLoyaltySettings` metadata type.

**Allow customers to join and leave loyalty programs, as well as members to join and opt out of promotions on the Experience Cloud site**

Use the new `enableLoyaltyApiAccessForExternalSiteUsers` field on the `IndustriesLoyaltySettings` metadata type.

SEE ALSO:

[Loyalty Management Developer Guide: IndustriesLoyaltySettings](#) (can be outdated or unavailable during release preview)

## New Connect REST APIs

Connect REST APIs help customers, partners, and ISVs integrate with Salesforce software and UIs.

### New Connect APIs

**Get a list of vouchers issued to a loyalty program member**

Make a GET request to the new

`/connect/loyalty/programs/{programName}/members/{membershipNumber}/vouchers` resource.

New response body: Vouchers List

**Unenroll a loyalty program member from a promotion**

Make a POST request to the new

`/connect/loyalty/programs/{programName}/program-processes/{OptOutPromotion}` resource.

## Changed Connect REST API Response Bodies

These response bodies have changes.

**Member Benefit Output**

This response body has a new field:

`description`—The description of the benefit available to a loyalty program member.

## Manufacturing Cloud

Maximize customer and asset lifetime value, drive servitization, and nurture deep relationships with your partners. Cultivate deeper customer loyalty by building a nuanced, scalable warranty management process by using Warranty Lifecycle Management. Gain a comprehensive understanding of every aspect of an asset's lifecycle by using Asset Service Console for Manufacturing. Service technicians in the field can promptly generate estimates for products and services by using the Pre-Work Estimation app. Get deeper insights on your sales and team performance with the new CRM Analytics-powered dashboards in the Analytics for Manufacturing app.

**IN THIS SECTION:**[Warranty Lifecycle Management](#)

Orchestrate the end-to-end warranty lifecycle with unparalleled versatility and ease. Develop a thorough framework of rules on warranty eligibility and entitlements at multiple product levels. Standardize the types of defects that the warranties cover and the labor services that you provide. Capture descriptive warranty claims from partners with details on the defective assets, existing coverages, and claimed expenses. Infuse transparency in the claims submission process by letting your partners use the Experience Cloud portal to view the status of claims. Set up an automated process to efficiently validate and adjudicate claims and then manually scrutinize selected claims from a single page.

### [Get a 360-Degree View of an Asset](#)

Customer service representatives (CSRs) can manage every stage of an asset's lifecycle by using the Asset Service Console for Manufacturing. They can get a holistic view of the activities related to an asset with relevant alerts, key milestones, and a timeline of the services performed on the asset. CSRs can also capture granular details about an asset, such as associated accounts and contacts, sales information, and serial number. Also, they can track warranties, cases, work orders, and claims related to an asset.

### [Create Order Estimates During Field Work](#)

Service technicians can swiftly generate estimates for products and services and add labor or installation charges through an easy-to-use guided flow. After the estimates are approved, they can create orders, generate order summaries as PDFs, and email order summaries to a contact.

### [Analytics for Manufacturing Cloud](#)

Set up a CRM Analytics app for Manufacturing Cloud more easily by using the new setup flow. Track your team's performance by using the new CRM Analytics-powered dashboards. Identify areas of improvement in sales by using the new embedded widgets and analytics.

### [Actionable Segmentation in Manufacturing Cloud \(Generally Available\)](#)

Segment and curate similar client profiles, and design timely and personalized client outreach programs with Actionable Segmentation.

### [Service Experience Enhancements in Manufacturing Cloud](#)

Nurture deeper customer relationships and empower customer service representative to be more productive with enhancements to the service console components in Manufacturing Cloud.

### [Data Processing Engine Enhancements](#)

Orchestrate the calculation of advanced account forecasts and program-based business forecasts in Manufacturing Cloud using Data Processing Engine. Use a forecast node in a Data Processing Engine definition to generate forecasts based on today's data to make informed business decisions. Use variables of type expression in a formula node when you don't know the exact evaluation or calculation logic when creating a definition.

### [Watch Manufacturing Cloud Videos](#)

New videos help your users learn about the capabilities of Manufacturing Cloud.

### [New and Changed Objects in Manufacturing Cloud](#)

Manufacturing Cloud includes these new and changed objects.

## Warranty Lifecycle Management

Orchestrate the end-to-end warranty lifecycle with unparalleled versatility and ease. Develop a thorough framework of rules on warranty eligibility and entitlements at multiple product levels. Standardize the types of defects that the warranties cover and the labor services that you provide. Capture descriptive warranty claims from partners with details on the defective assets, existing coverages, and claimed expenses. Infuse transparency in the claims submission process by letting your partners use the Experience Cloud portal to view the status of claims. Set up an automated process to efficiently validate and adjudicate claims and then manually scrutinize selected claims from a single page.

### IN THIS SECTION:

#### [Ensure Accurate Warranty Claims Adjudication and Service Planning](#)

Warranty managers can develop comprehensive service standards that can be consistently used in warranty and other service operations. Create product fault codes to standardize the types of faults in the products that are covered under warranties. Create product labor codes to record the type of labor services and their associated hours of effort. Warranty managers can also create codeset relationships to associate the type of faults with the type of labor services required.

### Introduce a Deeper Granularity to Warranty Terms

Warranty managers can now extend rules on warranty eligibility and entitlement by defining product-, defect-, or entitlement-based conditions of eligibility. Create warranty term coverages to specify the parts of a product, faults, and labor services that are included in or excluded from a warranty term.

### Adjudicate Warranty Claims Easily by Capturing Detailed Claims from Partners

Capture warranty claims from partners that have granular details such as defective asset, coverage, and expense details and minimize the followups for additional information. Partners can record the details of defective assets, such as their fault date, repair date, and usage. They can also specify causal parts of the asset with details, such as the fault code, claimed amount, and applied warranty terms. Track the incurred expenses such as the cost of the replaced parts and labor charges.

### Adjudicate Warranty Claims with Speed and Accuracy

Swiftly investigate asset defects, verify warranty coverages, and determine claim expenses. Claim adjudicators can manually adjudicate claims by reviewing the claim details and by determining the expenses for the repair or replacement of parts—all from a single page. Build a flexible, robust claims adjudication process by using process automation tools to supercharge the productivity of claim adjudicators and reduce the processing time.

## Ensure Accurate Warranty Claims Adjudication and Service Planning

Warranty managers can develop comprehensive service standards that can be consistently used in warranty and other service operations. Create product fault codes to standardize the types of faults in the products that are covered under warranties. Create product labor codes to record the type of labor services and their associated hours of effort. Warranty managers can also create codeset relationships to associate the type of faults with the type of labor services required.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions with Manufacturing Cloud and Warranty Lifecycle Management.

**Who:** This feature is available to users with the Warranty Lifecycle Management permission set.

**How:** From the App Launcher, select **Product Fault Codes**, **Product Labor Codes**, or **Codeset Relationships**, and then click **New**.



The image displays three screenshots of the Salesforce Manufacturing Cloud interface, illustrating the new warranty term coverage capabilities.

**Top Left: Product Fault Code Details**  
 The interface shows the 'Product Fault Code' record for 'f0121'. The 'Product' is 'Hammer 52X' and the 'Product Family' is 'Drills'. The 'Details' tab is active, showing the 'Information' section with fields for Name (PFC-0001), Fault Code (f0121), Product (Hammer 52X), and Product Family (Drills).

**Top Right: Product Labor Code Details**  
 The interface shows the 'Product Labor Code' record for 'PLC-000000001'. The 'Labor Code' is 'T232', 'Product' is 'Hammer 52X', 'Estimated Effort' is '5', and 'Product Family' is 'Drills'. The 'Details' tab is active, showing the 'Information' section with fields for Name (PLC-000000001), Labor Code (T232), Product (Hammer 52X), Estimated Effort (5), Product Family (Drills), and Drills.

**Bottom Left: Codeset Relationship Details**  
 The interface shows the 'Codeset Relationship' record for 'f0121'. The 'Codeset Type' is 'Product Fault Code', 'Related Codeset' is 'T232', and 'Related Codeset Type' is 'Product Labor Code'. The 'Details' tab is active, showing the 'Information' section with fields for Name (CSR-0002), Codeset Type (Product Fault Code), Codeset (f0121), Related Codeset Type (Product Labor Code), and Related Codeset (T232).

## SEE ALSO:

[Salesforce Help: Manage Warranties and Service Standards for Your Products and Assets \(can be outdated or unavailable during release preview\)](#)

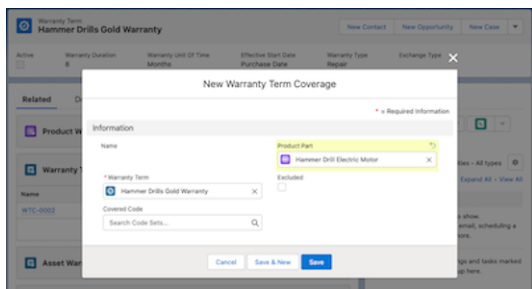
## Introduce a Deeper Granularity to Warranty Terms

Warranty managers can now extend rules on warranty eligibility and entitlement by defining product-, defect-, or entitlement-based conditions of eligibility. Create warranty term coverages to specify the parts of a product, faults, and labor services that are included in or excluded from a warranty term.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions with Manufacturing Cloud and Warranty Lifecycle Management.

**Who:** This feature is available to users with the Warranty Lifecycle Management permission set.

**How:** On the Warranty Term Coverages related list of a Warranty Term record, create a Warranty Term Coverage record, and then specify the warranty term, product part, and covered codes.



SEE ALSO:

[Salesforce Help: Manage Warranties and Service Standards for Your Products and Assets \(can be outdated or unavailable during release preview\)](#)

## Adjudicate Warranty Claims Easily by Capturing Detailed Claims from Partners


Capture warranty claims from partners that have granular details such as defective asset, coverage, and expense details and minimize the followups for additional information. Partners can record the details of defective assets, such as their fault date, repair date, and usage. They can also specify causal parts of the asset with details, such as the fault code, claimed amount, and applied warranty terms. Track the incurred expenses such as the cost of the replaced parts and labor charges.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions with Manufacturing Cloud and Warranty Lifecycle Management.

**Who:** This feature is available to users with the Warranty Lifecycle Management and Claims Management Foundation permission sets.

**How:** As a partner user, submit claims by using the Manufacturing Experience Cloud site. Create a Claim, Claim Item, Claim Coverage, or Claim Coverage Payment Detail record.

As a warranty claims adjudicator, track the Claim, Claim Item, Claim Coverage, or Claim Coverage Payment Detail records created by your partners. From the App Launcher, select **Claim**, **Claim Item**, **Claim Coverage**, or **Claim Coverage Payment Detail**, and open a record from the list view.



**Claim**  
**AD1231F**

Account <a href="#">Global Media</a>	Claim Type Warranty Claim	Status Manual Review Needed	Total Claimed Amount USD 0.00	Total Adjusted Amount USD 0.00
-----------------------------------------	------------------------------	--------------------------------	----------------------------------	-----------------------------------

**Details**
Claim Items
Documents

Information

Claim Number AD1231F	Finalized Date 4/4/2023, 12:00 PM
Account <a href="#">Global Media</a>	Status Manual Review Needed
Claim Type Warranty Claim	Claim Reason The electric motor of the Hammer 52X isn't working.
Severity High	Total Adjusted Amount USD 0.00
FNOL Channel Web	
Total Claimed Amount USD 0.00	
Related Claim	
Currency ISO Code USD - U.S. Dollar	


**Claim Item**  
**Hammer 52X - 53114B**


New C

Claim  
[AD1231F](#)

Related
**Details**

Information

Name Hammer 52X - 53114B	Description
Claim <a href="#">AD1231F</a>	Repair Date 4/10/2023, 12:00 PM
Asset <a href="#">Hammer 52X - MD1231</a>	Asset Usage Unit of Measure
Fault Date 4/1/2023, 11:15 AM	
Asset Usage Value	

 Claim Coverage

**Pin 32i Hammer 52X - 53114B**

New

Claim

[Hammer 52X - 53114B Drill Head Replacement](#)

Related

**Details**

▼ Information

Name	Pin 32i Hammer 52X - 53114B	Claim	<a href="#">Hammer 52X - 53114B Drill Head Replacement</a>
Claim Participant	<a href="#">CP-00000001</a>	Asset Warranty	
Claim Item	<a href="#">Hammer 52X - 53114B - Electric Motor</a>	Causal Part	<a href="#">Pin 32i Hammer 52X</a>
Status	Open	Total Adjusted Amount	USD 1,200.01
Coverage Type	Standard Warranty		
Fault Code			
Total Claimed Amount	USD 111.00		

**Claim Coverage Payment Detail**  
**Pin 32i Hammer 52X Replacement**

Claim Coverage  
[Pin 32i Hammer 52X - 53114B](#)

Related **Details**

▼ Information

Name	Pin 32i Hammer 52X Replacement	Claim Coverage	<a href="#">Pin 32i Hammer 52X - 53114B</a>
Status	Approved	Claimed Amount	USD 111.00
Description		Adjusted Amount	USD 1,200.01
Charge Type Code	<a href="#">T232</a>	Quantity	
Replacement Part	<a href="#">Pin 32i Hammer 52X</a>	Charge Type	Labor
		Price Book Entry	

SEE ALSO:

[Salesforce Help: Capture Warranty Claims from Partners, Suppliers, and Distributors \(can be outdated or unavailable during release preview\)](#)

## Adjudicate Warranty Claims with Speed and Accuracy

Swiftly investigate asset defects, verify warranty coverages, and determine claim expenses. Claim adjudicators can manually adjudicate claims by reviewing the claim details and by determining the expenses for the repair or replacement of parts—all from a single page. Build a flexible, robust claims adjudication process by using process automation tools to supercharge the productivity of claim adjudicators and reduce the processing time.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions with Manufacturing Cloud and Warranty Lifecycle Management.

**Who:** This feature is available to users with the Warranty Lifecycle Management and Claims Management Foundation permission sets.

**How:** To manually adjudicate claims, from the App Launcher, select **Claims**. Click **Claim Details** on a Claim record, and then enter the adjusted amount on the Payment Details card.

**Claim AD1231F**

Account: Global Media | Claim Type: Warranty Claim | Status: Manual Review Needed | Total Claimed Amount: USD 0.00 | Total Adjusted Amount: USD 0.00

**Details** | **Claim Items** | Documents

✓ Hammer 52X - 53114B - Electric Motor

Asset Name	Fault Date	Repair Date	Asset Usage
Hammer 52X - 53114B	2/7/2023	2/8/2023	

Asset Warranty	Warranty Type	Warranty Term	Start Date	End Date	Active
AW-0002	Repair	Hammer Drills Gold Warranty	2023-01-11	2023-09-22	true

✓ **Payment Details**

Causal Part	Fault Code	Asset Warranty	Coverage Type	Total Claim Amount	Total Adjusted Amount
Hammer 52X - 53114B Drill Head	60121	AW-0001	Standard Warranty	\$0.00	\$0.00

Looks like there aren't any claim coverage payment details associated with this claim coverage.

✓ **Payment Details**

Causal Part	Fault Code	Asset Warranty	Coverage Type	Total Claim Amount	Total Adjusted Amount
Pin 32i Hammer 52X	60121	AW-0001	Standard Warranty	\$111.00	\$1,200.01

Name	Charge Type	Charge Type Code	Replaced Part	Quantity	Claimed Amount	#
Pin 32i Hammer 52X Replacement	Labor	T232	Pin 32i Hammer 52X		\$111.00	\$

> Hammer 52X - 53114B

To set up an automation process to adjudicate claims, use Flow Builder and Business Rules Engine.

#### SEE ALSO:

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

## Get a 360-Degree View of an Asset

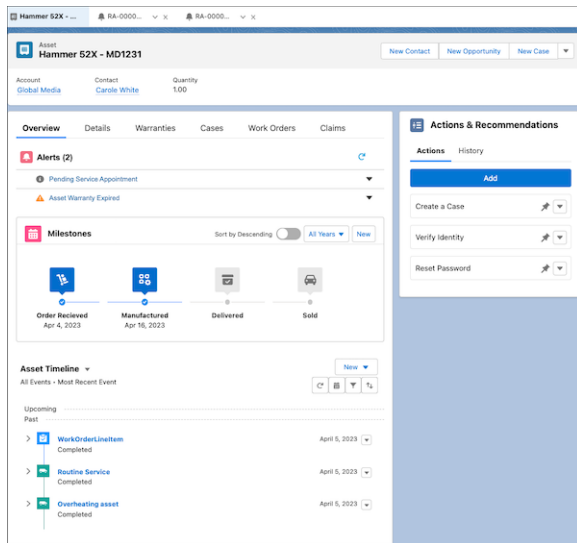
Customer service representatives (CSRs) can manage every stage of an asset's lifecycle by using the Asset Service Console for Manufacturing. They can get a holistic view of the activities related to an asset with relevant alerts, key milestones, and a timeline of the services performed on the asset. CSRs can also capture granular details about an asset, such as associated accounts and contacts, sales information, and serial number. Also, they can track warranties, cases, work orders, and claims related to an asset.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions with Manufacturing Cloud and Service Console for Manufacturing.

**Who:** Asset Service Console for Manufacturing is available to users with the Service Console for Manufacturing or the Warranty Lifecycle Management permission sets. To use the Record Alerts, Timeline, and Actions & Recommendations components in the console, users need the Industry Service Excellence permission set. To use the Milestones component in the console, users need the Business Milestones and Life Events Access permission set.

**Why:** Asset Service Console for Manufacturing shows all information related to an asset on a single page with the versatile service console components and platform capabilities. It has related lists of asset warranties, cases, work orders, and claim item.

**How:** In Service Console for Manufacturing app, select the Asset view and open an asset from the list view.



## SEE ALSO:

[Salesforce Help: Asset Service Console for Manufacturing](#)(can be outdated or unavailable during release preview)

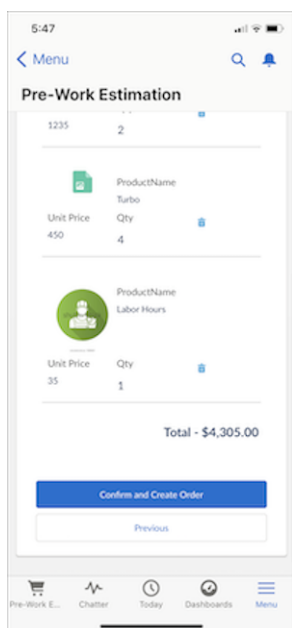
## Create Order Estimates During Field Work

Service technicians can swiftly generate estimates for products and services and add labor or installation charges through an easy-to-use guided flow. After the estimates are approved, they can create orders, generate order summaries as PDFs, and email order summaries to a contact.

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

**Who:** This feature is available to users with the Manufacturing for Service permission set.

**How:** Use the pre-work estimation OmniScripts, OmniStudio FlexCards, Document Templates, and custom component.



SEE ALSO:

[Salesforce Help: Provide On-Site Pre-Work Estimates and Track Customer Approvals](#)(can be outdated or unavailable during release preview)

## Analytics for Manufacturing Cloud

Set up a CRM Analytics app for Manufacturing Cloud more easily by using the new setup flow. Track your team's performance by using the new CRM Analytics-powered dashboards. Identify areas of improvement in sales by using the new embedded widgets and analytics.

IN THIS SECTION:

### [Set Up Analytics for Manufacturing Cloud More Easily](#)

Create the CRM Analytics app for Manufacturing Cloud easily by using the new one-page setup flow. Follow the steps to assign relevant permissions, configure and enable CRM Analytics, and create an app with datasets and dashboards for a configuration.

### [Get Insights into Agreements, Forecasts, and Team to Manage Sales Better](#)

The new dashboards in the Analytics for Manufacturing app provide insights into your account health, demand planning, product penetration, sales agreements, and much more based on key performance metrics. Use the new embedded widgets and analytics to quickly compare the actuals to the forecast and planned revenue, to identify high-performing accounts, to analyze the sales based on target revenue, or to track the worst-performing agreement based on revenue realization.

## Set Up Analytics for Manufacturing Cloud More Easily

Create the CRM Analytics app for Manufacturing Cloud easily by using the new one-page setup flow. Follow the steps to assign relevant permissions, configure and enable CRM Analytics, and create an app with datasets and dashboards for a configuration.

**Where:** This feature is available in Lightning Experience in Enterprise and Unlimited editions where Manufacturing Cloud is enabled. CRM Analytics for Manufacturing or Manufacturing Cloud Intelligence is available only to Manufacturing Cloud and Health Cloud users.

**Who:** To use this feature, users need the Manufacturing Analytics Apps add-on license or Healthcare Analytics Apps add-on license and must have the Manufacturing or Health data model deployed



**How:** From Setup, in the Quick Find box, enter *Set Up CRM Analytics for Manufacturing*, and then select **Set Up CRM Analytics for Manufacturing**. Follow the instructions on the page to set up Analytics for Manufacturing Cloud.

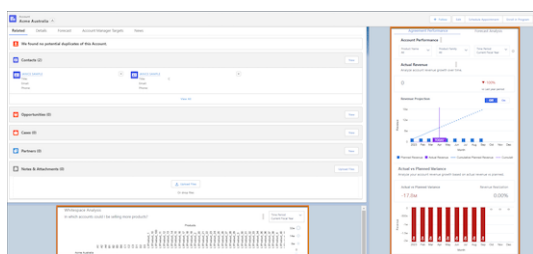
## Get Insights into Agreements, Forecasts, and Team to Manage Sales Better

The new dashboards in the Analytics for Manufacturing app provide insights into your account health, demand planning, product penetration, sales agreements, and much more based on key performance metrics. Use the new embedded widgets and analytics to quickly compare the actuals to the forecast and planned revenue, to identify high-performing accounts, to analyze the sales based on target revenue, or to track the worst-performing agreement based on revenue realization.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions where Manufacturing Cloud is enabled. CRM Analytics for Manufacturing or Manufacturing Cloud Intelligence is only for Salesforce Manufacturing Cloud and Health Cloud users.

**Who:** To use this feature, users need the Manufacturing Analytics Apps add-on license or Healthcare Analytics Apps add-on license and must have the Manufacturing or Health data model deployed.

**How:** From Setup, in the Quick Find box, enter *Set Up CRM Analytics for Manufacturing*, and then select **Set Up CRM Analytics for Manufacturing**. Follow the instructions on the page to set up Analytics for Manufacturing Cloud.



## Actionable Segmentation in Manufacturing Cloud (Generally Available)

Segment and curate similar client profiles, and design timely and personalized client outreach programs with Actionable Segmentation.

### IN THIS SECTION:

#### [Actionable List Members](#)

Large actionable lists are now configured asynchronously. List creators can update the engagement status of prospects, including existing customers. In addition, list creators can perform bulk actions on prospect records and configure the sort field and the order in which prospects are sorted in the Outreach List component.

#### [Outreach List](#)

Sales and service agents can now search for and select an actionable list to view the associated prospects, including existing customers. Actionable lists are grouped by their priority. Agents can now see the assigned prospects in accordion view. The field and value used to sort the prospects are also shown to agents, and prospects are grouped by their engagement status. In addition, agents can update the engagement status of prospects and call them. Developers can use two new APIs to get actionable list records and metadata.

### SEE ALSO:

[Actionable Segmentation \(Generally Available\)](#)

## Actionable List Members

Large actionable lists are now configured asynchronously. List creators can update the engagement status of prospects, including existing customers. In addition, list creators can perform bulk actions on prospect records and configure the sort field and the order in which prospects are sorted in the Outreach List component.

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

**Who:** This feature is available only to users who have the Industry Sales Excellence add-on license with Actionable Segmentation permission set.

SEE ALSO:

[Actionable List Members](#)

## Outreach List

Sales and service agents can now search for and select an actionable list to view the associated prospects, including existing customers. Actionable lists are grouped by their priority. Agents can now see the assigned prospects in accordion view. The field and value used to sort the prospects are also shown to agents, and prospects are grouped by their engagement status. In addition, agents can update the engagement status of prospects and call them. Developers can use two new APIs to get actionable list records and metadata.

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

**Who:** This feature is available only to users who have the Industry Sales Excellence add-on license with Actionable Segmentation permission set.

SEE ALSO:

[Outreach List](#)

## Service Experience Enhancements in Manufacturing Cloud

Nurture deeper customer relationships and empower customer service representative to be more productive with enhancements to the service console components in Manufacturing Cloud.

IN THIS SECTION:

[Action Launcher](#)

Customer service representatives (CSRs) can quickly resolve customer requests by launching out-of-the-box OmniScripts. CSRs can select an OmniScript, flow, or flow orchestration to navigate to the action's previously opened subtab without losing the information entered earlier. CSRs can open quick actions containing a Visualforce page. Furthermore, CSRs can benefit from improved accessibility due to compliance with the color contrast requirements of Web Content Accessibility Guidelines (WCAG) 2.1. Additionally, CSRs can see up to 10 recently used actions listed in Action Launcher. Administrators can enable self-service for customers through Experience Cloud. Also, admins can now select the Engagement Interaction object while creating a deployment.

[Audit Trail](#)

Monitor and analyze customers' secondary identity verification audit records to detect potential cases of compliance fraud and identity breach. Access all filter options in a pop-up window. Filter audit records based on verification status and initiating attendee. View communication channel and verification type information. For audit records of secondary verification type, view primary and secondary verification details by clicking a hyperlink in the Initiating Attendee Type column. Export audit records in CSV format. Get email notification about the success or failure of the export request. Download or delete the exported file using the Audit Trail Export Dashboard.

### Engagement

Customer service representatives (CSRs) can now accept customer requests through standard SMS, standard and enhanced Facebook Messenger, and enhanced WhatsApp. CSRs can create list views to filter their Engagement Attendee, Engagement Interaction, and Engagement Topic records. In addition, CSRs can experience better user interface performance due to the migration of engagement-related user interface components from Aura to Lightning Web Component (LWC). Moreover, CSRs can benefit from improved accessibility due to compliance with the color contrast requirements of Web Content Accessibility Guidelines (WCAG) 2.1. Administrators can create LWC quick actions on Engagement Interaction, Engagement Attendee, and Engagement Topic objects.

### Identity Verification

Customer service representatives (CSRs) can now verify the identity of customers who contact through standard SMS, standard and enhanced Facebook Messenger, and enhanced WhatsApp and add customers' verification answers to form fields. Admins can configure whether a verification field is shown as a form or radio button to CSRs. In addition administrators can configure the record page that's shown to CSRs after identity verification is successful. The identity verification flows, which have new names, have been updated, and developers can use a new API for form-based identity verification.

### Record Alerts

Provide access to record alerts. Refine record alerts by using Business Rules Engine. Show alerts from your external systems using Data Consumption Framework.

### Service Process Studio

Do more with Service Process Studio. Admins can clone service process definitions, group the service process data attributes into sections and organize these sections, and define lookup-type extended data attributes. Customer service representatives can view all the service process data attributes on the Case Details Lightning component.

## Action Launcher

Customer service representatives (CSRs) can quickly resolve customer requests by launching out-of-the-box OmniScripts. CSRs can select an OmniScript, flow, or flow orchestration to navigate to the action's previously opened subtab without losing the information entered earlier. CSRs can open quick actions containing a Visualforce page. Furthermore, CSRs can benefit from improved accessibility due to compliance with the color contrast requirements of Web Content Accessibility Guidelines (WCAG) 2.1. Additionally, CSRs can see up to 10 recently used actions listed in Action Launcher. Administrators can enable self-service for customers through Experience Cloud. Also, admins can now select the Engagement Interaction object while creating a deployment.

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

**Who:** This feature is available only to users who have the Industry Service Excellence permission set.

SEE ALSO:

[Action Launcher](#)

## Audit Trail

Monitor and analyze customers' secondary identity verification audit records to detect potential cases of compliance fraud and identity breach. Access all filter options in a pop-up window. Filter audit records based on verification status and initiating attendee. View communication channel and verification type information. For audit records of secondary verification type, view primary and secondary verification details by clicking a hyperlink in the Initiating Attendee Type column. Export audit records in CSV format. Get email notification about the success or failure of the export request. Download or delete the exported file using the Audit Trail Export Dashboard.

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

**Who:** This feature is available only to users who have the Industry Service Excellence permission set.

SEE ALSO:

[Audit Trail](#)

## Engagement

Customer service representatives (CSRs) can now accept customer requests through standard SMS, standard and enhanced Facebook Messenger, and enhanced WhatsApp. CSRs can create list views to filter their Engagement Attendee, Engagement Interaction, and Engagement Topic records. In addition, CSRs can experience better user interface performance due to the migration of engagement-related user interface components from Aura to Lightning Web Component (LWC). Moreover, CSRs can benefit from improved accessibility due to compliance with the color contrast requirements of Web Content Accessibility Guidelines (WCAG) 2.1. Administrators can create LWC quick actions on Engagement Interaction, Engagement Attendee, and Engagement Topic objects.

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

**Who:** This feature is available only to users who have the Industry Service Excellence permission set.

SEE ALSO:

[Engagement](#)

## Identity Verification

Customer service representatives (CSRs) can now verify the identity of customers who contact through standard SMS, standard and enhanced Facebook Messenger, and enhanced WhatsApp and add customers' verification answers to form fields. Admins can configure whether a verification field is shown as a form or radio button to CSRs. In addition administrators can configure the record page that's shown to CSRs after identity verification is successful. The identity verification flows, which have new names, have been updated, and developers can use a new API for form-based identity verification.

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

**Who:** This feature is available only to users who have the Industry Service Excellence permission set.

SEE ALSO:

[Identity Verification](#)

## Record Alerts

Provide access to record alerts. Refine record alerts by using Business Rules Engine. Show alerts from your external systems using Data Consumption Framework.

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

**Who:** This feature is available only to users who have the Industry Service Excellence permission set.

SEE ALSO:

[Record Alerts](#)

## Service Process Studio

Do more with Service Process Studio. Admins can clone service process definitions, group the service process data attributes into sections and organize these sections, and define lookup-type extended data attributes. Customer service representatives can view all the service process data attributes on the Case Details Lightning component.

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

SEE ALSO:

[Service Process Studio](#)

## Data Processing Engine Enhancements

Orchestrate the calculation of advanced account forecasts and program-based business forecasts in Manufacturing Cloud using Data Processing Engine. Use a forecast node in a Data Processing Engine definition to generate forecasts based on today's data to make informed business decisions. Use variables of type expression in a formula node when you don't know the exact evaluation or calculation logic when creating a definition.

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



**Who:** This feature is available only to users who have the Data Pipelines Base User permission set.

SEE ALSO:

[Data Processing Engine](#)

## Watch Manufacturing Cloud Videos

New videos help your users learn about the capabilities of Manufacturing Cloud.

-  [Take a Tour of Service Console for Manufacturing](#) explores how the Service Console for Manufacturing app and its components help you deliver a proactive and timely service experience.
-  [Extend Service Console for Manufacturing](#) explores how to enhance the service experience of your customers by customizing the Service Console for Manufacturing.

## New and Changed Objects in Manufacturing Cloud

Manufacturing Cloud includes these new and changed objects.

### New Objects

Here are the new objects in Manufacturing Cloud.

#### **Store details about a warranty claim**

Use the new Claim object.

#### **Store details about a defective product related to a warranty claim**

Use the new ClaimItem object.

#### **Store details about a causal part in a defective asset**

Use the new ClaimCoverage object.

#### **Store details about expenses, repairs, and labor services to rectify a causal part**

Use the new ClaimCoveragePaymentDetail object.

**Associate a claim with an account**

Use the new ClaimParticipant object.

**Store details about a code set on a standardized definition of a situation or an activity**

Use the new CodeSet object.

**Associate a code set with a related code set**

Use the new CodesetRelationship object.

**Associate a code set on a product fault with a product or a product family**

Use the new ProductFaultCode object.

**Associate a code set on a labor code with a product or a product family**

Use the new ProductLaborCode object.

**Store details about extended or restricted coverage of a warranty term based on a code set or causal part**

Use the new WarrantyTermCoverage object.

## Changed Object

Here is the changed object in Manufacturing Cloud.

**Store details about the product usage that's covered in a warranty term**

Use the new `UsageCovered` and `UsageCoveredUomId` fields on the WarrantyTerm object.

**SEE ALSO:**

[Manufacturing Cloud Developer Guide: Manufacturing Cloud Standard Objects](#)

## Net Zero Cloud

Use CSV files to upload data to Net Zero Cloud. Allocate a portion of emissions from your subsidiaries and partner users by extending carbon accounting in your Net Zero Cloud org. Use electricity as a fuel type to calculate emissions from electric vehicles. Consolidate social and governance data for extended organizational boundaries, such as subsidiaries of the parent company or external partners within your Net Zero Cloud org.

**IN THIS SECTION:**[Allocate a Portion of Subsidiary or Partner Emissions to the Parent Company](#)

Allow your parent company to consolidate emissions more accurately in the parent inventory by allocating a percentage of emissions from their subsidiaries or partners in their company hierarchy to the parent company. The emissions allocation percentages are decided by the parent company. If a percentage of emissions isn't allocated, 100% emissions from all subsidiaries or partners in the company hierarchy are aggregated in the parent inventory.

[Let Affiliate Company Users Manage Social and Governance Data](#)

Let affiliate company users access Net Zero Cloud social and governance objects through the Experience Cloud site that you create. Enable them to manage their social and governance data and use Net Zero Cloud Disclosure and Compliance Hub to generate disclosure reports.

[Manage The Social and Governance Data in Extended Organizations](#)

If your company is a conglomerate that has fully owned subsidiaries, the parent company and the extended organization can manage their respective social and governance data. The parent company can then consolidate the data from all subsidiaries for reporting.

### [Upload Net Zero Cloud Data Using Data Upload Templates](#)

Download and use CSV templates to upload data for carbon accounting, emissions factors, waste footprints, water management, or social and governance objects into Net Zero Cloud. Use the CSV Template Download Lightning component on the Net Zero Cloud Home tab to download a CSV template file formatted for the selected object. Add the data in the CSV file and upload it to Received Documents for processing. You can use the CSV file to populate data for any Net Zero Cloud object, including energy use records, emissions forecasts, and assets.

### [Other Improvements to Carbon Accounting](#)

Learn about other changes that improve carbon accounting for your Net Zero Cloud Manager.

### [Track Field History for Net Zero Cloud](#)

Track up to 20 fields in each Net Zero Cloud object to see what's changed in the Related tab of the Net Zero Cloud object.

### [Let Users Submit Approval Requests from a Record](#)

Add the Submit for Approval button to a page layout so that the record owners can submit a request for approval directly from the record. Also, add the Approval History related list to let users track the approval status of the record.

### [Generate a SASB Report with the Disclosure and Compliance Hub Template](#)

Easily generate a Sustainability Accounting Standards Board (SASB) report with formatted questionnaires to gather the necessary information by using the Net Zero Cloud Disclosures for SASB managed package.

### [New and Changed Objects for Net Zero Cloud](#)

Do more with the new and changed Net Zero Cloud objects.

### [New and Changed Connect REST API Resources](#)

These resources are new or have changes.

## Allocate a Portion of Subsidiary or Partner Emissions to the Parent Company

Allow your parent company to consolidate emissions more accurately in the parent inventory by allocating a percentage of emissions from their subsidiaries or partners in their company hierarchy to the parent company. The emissions allocation percentages are decided by the parent company. If a percentage of emissions isn't allocated, 100% emissions from all subsidiaries or partners in the company hierarchy are aggregated in the parent inventory.

**Where:** This change applies to Lightning Experience in Professional, Enterprise, Unlimited, and Developer editions with the Net Zero Cloud Growth license and Net Zero Cloud - Multi-Organization Support add-on license.

**How:** From Setup, in the Quick Find box, enter *Net Zero Settings*, and then select **Net Zero Settings**. Turn on **Manage Carbon Accounting for Extended Organizational Boundaries**.

SEE ALSO:

[Salesforce Help: Allocate Emissions to a Parent Company \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: How Inventory Is Calculated for Emissions from Subsidiaries \(can be outdated or unavailable during release preview\)](#)

## Let Affiliate Company Users Manage Social and Governance Data

Let affiliate company users access Net Zero Cloud social and governance objects through the Experience Cloud site that you create. Enable them to manage their social and governance data and use Net Zero Cloud Disclosure and Compliance Hub to generate disclosure reports.

**Where:** This change applies to Lightning Experience in Professional, Enterprise, Unlimited, and Developer editions with the Net Zero Cloud Growth license and Net Zero Cloud - Multi-Organization Support add-on license.

**How:** From Setup, in the Quick Find box, enter *Net Zero Settings*, and then select **Net Zero Settings**. Turn on **Manage Social and Governance for Extended Organizational Boundaries**.

SEE ALSO:

[Salesforce Help: Let Affiliate Company Users Enter Social and Governance Data in Net Zero Cloud \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Social and Governance Reports for Extended Organizational Boundaries \(can be outdated or unavailable during release preview\)](#)

## Manage The Social and Governance Data in Extended Organizations

If your company is a conglomerate that has fully owned subsidiaries, the parent company and the extended organization can manage their respective social and governance data. The parent company can then consolidate the data from all subsidiaries for reporting.

**Where:** This change applies to Lightning Experience in Professional, Enterprise, Unlimited, and Developer editions with the Net Zero Cloud Growth license and Net Zero Cloud - Multi-Organization Support add-on license.

**How:** From Setup, in the Quick Find box, enter *Net Zero Settings*, and then select **Net Zero Settings**. Turn on **Manage Social and Governance for Extended Organizational Boundaries**.

SEE ALSO:

[Salesforce Help: Social and Governance Reports for Extended Organizational Boundaries \(can be outdated or unavailable during release preview\)](#)

## Upload Net Zero Cloud Data Using Data Upload Templates

Download and use CSV templates to upload data for carbon accounting, emissions factors, waste footprints, water management, or social and governance objects into Net Zero Cloud. Use the CSV Template Download Lightning component on the Net Zero Cloud Home tab to download a CSV template file formatted for the selected object. Add the data in the CSV file and upload it to Received Documents for processing. You can use the CSV file to populate data for any Net Zero Cloud object, including energy use records, emissions forecasts, and assets.

**Where:** This change applies to Lightning Experience in Professional, Enterprise, Unlimited, and Developer editions with the Net Zero Cloud Starter or Growth license.

**How:** From the Setup menu on the Net Zero Cloud Home page, select **Edit Page**. From the Components panel, drag the CSV Template Download component to the Lightning page canvas.

SEE ALSO:

[Salesforce Help: Configure Net Zero Cloud Data Upload \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Uploading Net Zero Cloud Data \(can be outdated or unavailable during release preview\)](#)

## Other Improvements to Carbon Accounting

Learn about other changes that improve carbon accounting for your Net Zero Cloud Manager.

**Where:** This change applies to Lightning Experience in Professional, Enterprise, Unlimited, and Developer editions with the Net Zero Cloud Growth license.

**Why:** These improvements help your Net Zero Cloud Manager calculate emissions more effectively.



- Calculate emissions for electric vehicles

You can now use electricity as a fuel type for vehicles to calculate electric vehicle emissions. When the fuel type is electricity, you can enter either distance or fuel consumption to calculate emissions. When the fuel type isn't electricity, you can enter only distance to calculate emissions. Previously, you had to provide both distance and fuel consumption to calculate emissions. Load the Other Emissions Factor Sets (Department for Environment, Food, and Rural Affairs (DEFRA) - Mobile Fuel conversion factors) version 3.3 to get the emissions factors for electric vehicles based on distance.

- Adjust GHG emissions using supplemental scope 3 emissions values on Scope 3 Carbon Footprint

Enter supplemental scope 3 emissions values for all GHG categories on scope 3 carbon footprint records to adjust emissions for category-wise scope 3 emissions. Previously, supplemental values were available only for Total Scope 3 emissions to adjust emissions.

- Classify scope 3 emissions into respective GHG categories for all energy uses

Select the GHG category in the scope allocation for the ground travel energy use, rental car energy use, vehicle asset emissions source, and stationary asset environmental source records to classify the emissions into the correct scope 3 GHG category. The aggregated scope 3 emissions are categorized in the correct GHG categories in the related carbon footprint and annual emissions inventory entities.

- Select market-based or location-based scope 2 emissions for total scope 2 emissions in the annual emissions inventory

When calculating the total scope 2 emissions in the annual emissions inventory, you can now specify whether location-based or market-based emissions are considered. By default, if you don't specify the scope 2 emissions type, scope 2 location-based emissions are used to calculate the total scope 2 emissions.

- Calculate emissions for refrigerants by estimating the refrigerant used

When calculating the emissions from refrigerants in the stationary asset energy use, you can now estimate the refrigerant consumption based on the occupied floor area of the asset. Previously, you had to enter the consumption values to calculate the emissions from refrigerants.

#### SEE ALSO:

[Net Zero Cloud Developer Guide: Net Zero Cloud Calculations \(can be outdated or unavailable during release preview\)](#)

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

## Track Field History for Net Zero Cloud

Track up to 20 fields in each Net Zero Cloud object to see what's changed in the Related tab of the Net Zero Cloud object.

**Where:** This change applies to Lightning Experience in Professional, Enterprise, Unlimited, and Developer editions with the Net Zero Cloud Starter or Growth license.

**When:** The Net Zero Cloud objects compatibility with field history tracking is available in Spring '23 and later releases.

**How:** From Setup, go to the Object Manager and select an object. Select **Fields & Relationships**, and click **Set History Tracking**.

## Let Users Submit Approval Requests from a Record

Add the Submit for Approval button to a page layout so that the record owners can submit a request for approval directly from the record. Also, add the Approval History related list to let users track the approval status of the record.

**Where:** This change applies to Lightning Experience in Professional, Enterprise, Unlimited, and Developer editions with the Net Zero Cloud Starter or Growth license.

**How:** From Setup, go to the Object Manager and select an object. Select **Page Layouts** and in an existing page layout add the Submit for Approval button and the Approval History related list.

SEE ALSO:

[Salesforce Help: Submit Records for Approval \(can be outdated or unavailable during release preview\)](#)

## Generate a SASB Report with the Disclosure and Compliance Hub Template

Easily generate a Sustainability Accounting Standards Board (SASB) report with formatted questionnaires to gather the necessary information by using the Net Zero Cloud Disclosures for SASB managed package.

**Where:** This change applies to Lightning Experience in Professional, Enterprise, Unlimited, and Developer editions with the Net Zero Cloud Growth license.

**How:** Install the Net Zero Cloud Disclosures for SASB package in your Net Zero Cloud org. 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 SASB Package \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Use Net Zero Cloud Disclosures Template for SASB to Create Disclosures \(can be outdated or unavailable during release preview\)](#)

## 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.

#### Identify an affiliate account

Use the new `AffiliateAccountId` field of the `DisclsReportingPeriod` object.

#### Identify a subsidiary account

- Use the new `SubsidiaryAccountId` field of the `DivrsEquityInclSum`, `EconomicPerformanceSum`, `EmpBenefitSummary`, `EmployeeDemographicSum`, `EmployeeDevelopmentSum`, `GovtFinancialAsstSum`, `OrgIncidentSummary`, and `TaxDisclosureSummary` objects.
- Use the new `NonMonetaryCtrb`, `NonMonetaryCtrbType`, and `SubsidiaryAccountId` fields of the `SocialContributionSum` object.

#### Allocate a portion of emissions to parent inventory

- Use the new `AccountNameId`, `AllocScope1EmissionsInTco2e`, `FinalScope1EmssnInTco2e`, `AllocScope2EmssnInTco2e`, `FinalScope2EmssnInTco2e`, `AllocScope3EmssnInTco2e`, `FinalScope3EmssnInTco2e`, `AllocScope1And2Emssn`, `FinalScp1And2EmssnInTco2e`, `TotalAllocEmissionsInTco2e`, and `FinalEmssnInTco2e` fields of the `AnnualEmssnInventory` object.
- Use the new `AccountNameId` field of the `Scope3EmssnSrc` object.
- Use the new `AccountId` and `IsParentCompany` fields of the `InternalOrganizationUnit` object.
- Use the new `AccountNameId` field of the `StnryAssetEnvrSrc` object.
- Use the new `AccountNameId` field of the `VehicleAssetEmssnSrc` object.

**Classify scope 3 emissions into respective GHG categories**

- Use the new EmissionsAllocToInvestCatg, EmissionsAllocToFranchCatg fields of the AnnualEmssnInventory object.
- Use the new Scope3GhgCategory field of the StnryAssetEnrgyUse object.
- Use the new Scp3EmssnDnstrmTrnspDstr, Scp3EmssnUpstrmTrnspDstr, Scp3EmssnEmpComut, Scp3EmssnBusTravl, and Scp3UncategorizedEmssn fields of the VehicleAssetCrbnFtprnt object.
- Use the new Scope3GhgCategory field of the VehicleAssetEnrgyUse object.
- Use the new TotScp3DnstrmTrnspDstr, TotScp3UpstrmTrnspDstr, TotScp3EmpComut, and Scope3BusinessTravel picklist values in CrbnEmssnScopeAlloc field of the VehicleAssetEmssnSrc object.
- Use the new Scope3GhgCategory field of the StnryAssetEnrgyUse object.
- Use the new SupplScp3EmssnCptlGoods, SupplDnstrmLsdAst, SupplScp3EmssnDnstrmTrnspDstr, SupplEndLifeTreatSoldPrdct, SupplScp3EmssnFranch, SupplFuelEnrgyRelaActv, SupplScp3EmssnInvestments, SupplProcessingSoldPrdct, SupplPurchGoodSrvcs, SupplUpstrmLsdAst, SupplUpstrmTrnspDstr, SupplUseSoldPrdct, SupplScp3UncatgEmssn, SupplScp3EmssnWstGenOper, SupplScp3EmssnEmpComut, and SupplScp3EmssnBizTravl fields of the Scope3CrbnFtprnt object.
- Use the new Scp3EmssnCptlGoods, Scope3EmssnDnstrmLsdAst, Scp3EndLifeTreatSoldPrdct, Scp3EmssnFranchises, Scp3FuelEnrgyRelaActv, Scp3EmssnInvestments, Scp3EmssnProcSoldPrdct, Scp3EmssnPurchGoodsSrvcs, Scp3EmssnUpstrmLsdAst, Scp3EmssnUseOfSoldPrdct, Scp3UncategorizedEmssn, and Scp3EmssnWstGenInOper fields of the StnryAssetCrbnFtprnt object.
- Use the new Scope3GhgCategory field of the GroundTravelEnrgyUse object.
- Use the new Scope3GhgCategory field of the RentalCarEnrgyUse object.

**Distinguish between market and location-based scope 2 emissions**

Use the new Scope2EmissionsType, TotScope2LocBasedEmssn, TotScope2MarketBsdEmssn, AllocScope2LocBasedEmssn, AllocScope2MktBasedEmssn, AllocScope1EmssnOverride, AllocScope2EmssnOverride, and AllocScope3EmssnOverride fields of the AnnualEmssnInventory object.

**Adjust GHG emissions using supplemental scope 3 emissions values**

Use the new SupplScp3EmssnCptlGoods, SupplDnstrmLsdAst, SupplScp3EmssnDnstrmTrnspDstr, SupplEndLifeTreatSoldPrdct, SupplScp3EmssnFranch, SupplFuelEnrgyRelaActv, SupplScp3EmssnInvestments, SupplProcessingSoldPrdct, SupplPurchGoodSrvcs, SupplUpstrmLsdAst, SupplUpstrmTrnspDstr, SupplUseSoldPrdct, SupplScp3UncatgEmssn, SupplScp3EmssnWstGenOper, SupplScp3EmssnEmpComut, and SupplScp3EmssnBizTravl fields of the Scope3CrbnFtprnt object.

**Calculate emissions for electricity fuel type**

- Use the new kWh picklist value in the FuelConsumptionUnit field and Electricity picklist value in the FuelType field of the VehicleAssetEnrgyUse object.
- Use the new FleetVehicleType field of the VehicleAssetEmssnSrc object.

**New Objects**

Here is the new data object in Net Zero Cloud.

**Manage the portion of emissions from a child or partner account that are allocated to a parent account**

Use the new EmissionsAllocation object.

**Retrieve the required information (JSON) for an object to create a CSV template for uploading the data.**

Use the new Object API Name Net Zero Cloud Business API.

**Retrieve the filtered list of objects and entities as per the requirement of the feature.**

Use the new Retrieve the List of Objects Net Zero Cloud Business API.

## New and Changed Connect REST API Resources

These resources are new or have changes.

### Net Zero Cloud

#### Retrieve the JSON information of an object to create a CSV template for uploading the data

Make a GET request to the new

```
/connect/industries/csv-data-template/${objectApiName}
```

resource.

New response body: Object CSV Data Template

#### Retrieve the filtered list of objects and entities as per the requirement of a feature

Make a GET request to the new

```
/connect/industries/${featureName}/objects
```

resource.

New response body: Feature Objects Result

## Public Sector Solutions

Use dynamic assessments with more objects, manage benefits with schedules and sessions, create referral intake flows with out-of-the-box components, and more.

### IN THIS SECTION:

#### [Constituent Service Toolkit](#)

Improve customer service for constituents with tools that enable caseworkers, case managers, and other users to work more efficiently and effectively.

#### [Capture and Store Key Information from Constituents Applying for Benefits, Licenses, and Permits](#)

Create applications using Discovery Framework to gather information from constituents who apply for benefits, licenses, and permits. Capture the effective start and end dates for information such as income, expenses, and assets owned. Store the collected information including effective dates in the data model using DataRaptors.

#### [Create and Merge Party Relationship Groups Using Guided Workflows](#)

Group household members in a party relationship group and specify member roles and relationships using the New Group workflow. Add related contacts, groups, and business accounts, and specify their relationships with the group and its members. Combine two party relationship groups, modify member roles and relationships, and the relationships of related contacts, groups, and business accounts using the Merge workflow. Review related information such as cases and complaints that merge along with the groups and create tasks to check these records later.

#### [Help Agencies Manage Service Providers](#)

Use the Provider Management data model to help agencies build and manage a network of providers. Caseworkers can find service providers from the data model to help constituents get the services they need.

#### [Set Up the Referral Intake Guided Flow Quickly with Out-of-the-Box Components](#)

Use OmniStudio components out of the box to set up a guided flow for referral intake. Previously, you had to download an OmniStudio DataPack from the Salesforce Industries Process Library, deploy OmniStudio components in your Public Sector Solutions org, and then set up the guided flow.

### [Use Dynamic Assessments with Account, Contact, and Case](#)

Do more with dynamic assessments by creating them for accounts, contacts, and cases. For example, create a questionnaire to periodically evaluate a child's safety on a child welfare case, or create an assessment for an individual or a group of individuals to determine whether a constituent is eligible for a benefit or service. And give caseworkers greater visibility into assessments by showing them in related lists for accounts, contact, or cases.

### [Easily Manage Benefit Schedules and Sessions and Track Disbursed Benefits](#)

Define and manage benefit schedules and sessions with ease using guided flows. See whether and how constituents exercise the benefits that you provide to them by using schedules and sessions. Enroll individuals or groups of individuals into benefit sessions on a set schedule, and then track their attendance. For example, enroll parents of a household in weekly counseling sessions, and then measure their participation by tracking their attendance.

### [Use the Data Model for Case Proceedings to Manage Court and Investigative Cases](#)

Capture information pertaining to legal proceedings using the data model. Structure information regarding proceedings such as court action, mediation, arbitration, or appeal. Manage hearing details, violations, and infractions. Record the result at the end of the proceedings such as enforcement action or support plans for victims and perpetrators. Also record any case episodes such as probation, suspension, revocation, removal, or imprisonment.

### [Quickly Preview Care Plans and Care Plan Templates](#)

Easily preview the structure of the care plan template before publishing it. Help caseworkers quickly access a summary of the goals and benefit assignments in a care plan or benefit assignment record page using preview.

### [View Composable Case Management Objects in the Salesforce Mobile App](#)

Provide investigators in the field instant access to critical information, improve communication and collaboration. Help them stay organized and on top of their tasks by providing them access to composable case management objects on the go from a mobile device. For example, investigators can now view the case, care plan details, and benefits received and add interaction summary notes at the point of investigation.

### [Award Grants to Constituents Using Grantmaking](#)

Manage the whole lifecycle of the grants you give to constituents. Add details about the opportunities people or organizations can apply for. Provide an easy way to enter details of a budget down to the values for each category and period. Capture all of the information related to a grant application. Track the requirements after a grant's awarded. Provide a Grantmaking Experience Cloud site for your grant managers, applicants, and external reviewers to enter details directly in your grant records.

### [Connect REST APIs](#)

Connect REST APIs help customers, partners, and ISVs integrate with Salesforce software and UIs.

### [New and Changed Public Sector Solutions Metadata Types](#)

Here are the updates to the metadata types in Public Sector Solutions.

## Constituent Service Toolkit

Improve customer service for constituents with tools that enable caseworkers, case managers, and other users to work more efficiently and effectively.

### IN THIS SECTION:

#### [Complete Common Service Tasks in Context with Action Launcher](#)

Give intake agents, caseworkers, and other users who engage with constituents access to common service tasks from the Action Launcher Lightning web component. With a simple menu selection, users can verify a constituent's identity, begin a referral intake process, send an email, or log a call. Customize the Action Launcher to suit your needs and add it to any record detail page that users access frequently so they can quickly and easily respond to constituent concerns in the context of the work they're already doing.

### [Protect Constituent Privacy and Reduce Fraud with Identity Verification and Audit Trail](#)

Before sharing private information, use a flow to verify a constituent's identity. Agents, caseworkers, and other service representatives can run the flow when a constituent engages with them over the phone, using Open CTI, through a messaging channel, or even in person. Start the flow from an engagement interaction or voice call record page, or from the utility bar of one of the Public Sector Solutions Lightning apps. Use Audit Trail to see the engagement interaction records that are created when a user verifies someone's identity, and to monitor engagements, analyze patterns, and detect potential fraud.

### [Receive Alerts on Records That Need Action](#)

Stay apprised of account and application records that need attention with Record Alerts. The Record Alert component shows caseworkers, application reviewers, and other users when a person account, business account, or individual application record requires action. It provides a description of the alert and organizes alerts by categories, such as type, priority, and severity. Users can dismiss or snooze alerts.

### [Deliver Service to Constituents from a Dedicated Account Lightning Record Page](#)

Give caseworkers relevant information about constituents and tools to provide service more efficiently with a dedicated Lightning record page for accounts. On the page, the Account card and Timeline component showcase important details about the constituent. The Action Launcher and Alerts components enable users to start common service-related actions and respond to pending record alerts. And the Interaction Summary tab lets users take notes of conversations and engagements with constituents.

### [Create Start-to-Finish Automation to Address Service Requests from Constituents with Service Process Studio](#)

Design processes that automate agencies' responses to service requests from constituents, from intake to resolution, with Service Process Studio. Use data attributes, OmniScript forms, Apex classes, and record-triggered flows to create automation to quickly and reliably process service requests, such as updating a constituent's address. You can even use integration definitions to connect service processes to external systems.

## Complete Common Service Tasks in Context with Action Launcher

Give intake agents, caseworkers, and other users who engage with constituents access to common service tasks from the Action Launcher Lightning web component. With a simple menu selection, users can verify a constituent's identity, begin a referral intake process, send an email, or log a call. Customize the Action Launcher to suit your needs and add it to any record detail page that users access frequently so they can quickly and easily respond to constituent concerns in the context of the work they're already doing.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Public Sector Solutions is enabled.

### SEE ALSO:

[Action Launcher](#)

[Salesforce Help: Configure and Use Action Launcher in Public Sector Solutions \(can be outdated or unavailable during release preview\)](#)

## Protect Constituent Privacy and Reduce Fraud with Identity Verification and Audit Trail

Before sharing private information, use a flow to verify a constituent's identity. Agents, caseworkers, and other service representatives can run the flow when a constituent engages with them over the phone, using Open CTI, through a messaging channel, or even in person. Start the flow from an engagement interaction or voice call record page, or from the utility bar of one of the Public Sector Solutions Lightning apps. Use Audit Trail to see the engagement interaction records that are created when a user verifies someone's identity, and to monitor engagements, analyze patterns, and detect potential fraud.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Public Sector Solutions is enabled.

SEE ALSO:

[Identity Verification](#)

[Audit Trail](#)

[Salesforce Help: Configure and Use Identity Verification in Public Sector Solutions \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Configure and Use Audit Trail in Public Sector Solutions \(can be outdated or unavailable during release preview\)](#)

## Receive Alerts on Records That Need Action

Stay apprised of account and application records that need attention with Record Alerts. The Record Alert component shows caseworkers, application reviewers, and other users when a person account, business account, or individual application record requires action. It provides a description of the alert and organizes alerts by categories, such as type, priority, and severity. Users can dismiss or snooze alerts.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Public Sector Solutions is enabled.

SEE ALSO:

[Salesforce Help: Configure and Use Record Alerts in Public Sector Solutions \(can be outdated or unavailable during release preview\)](#)

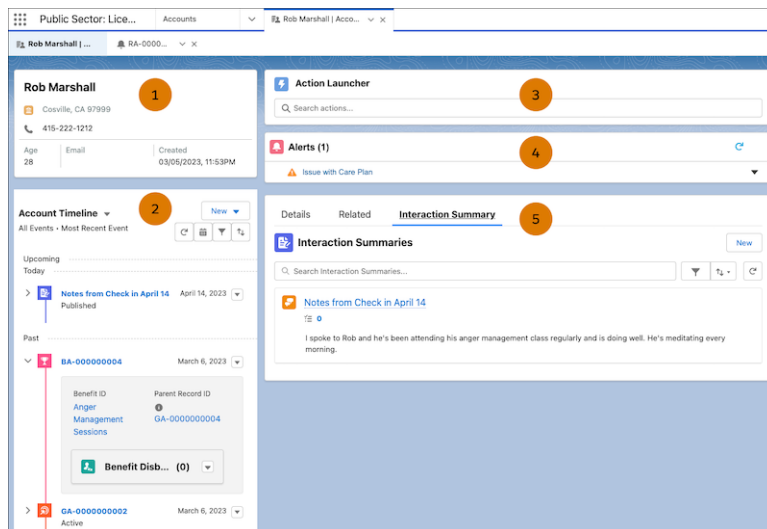
## Deliver Service to Constituents from a Dedicated Account Lightning Record Page

Give caseworkers relevant information about constituents and tools to provide service more efficiently with a dedicated Lightning record page for accounts. On the page, the Account card and Timeline component showcase important details about the constituent. The Action Launcher and Alerts components enable users to start common service-related actions and respond to pending record alerts. And the Interaction Summary tab lets users take notes of conversations and engagements with constituents.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Public Sector Solutions is enabled.

**Why:** Nothing is more important than providing excellent service to constituents. To help you achieve that mission, use an account Lightning record page dedicated to that purpose. The page pulls together useful tools to help Public Sector Solutions agents, caseworkers, and other representatives quickly and efficiently answer constituents' questions, solve their problems, and address their concerns. The page includes:

- An Account card with details such as the account name, address, and phone number (1).
- A Timeline that shows account-related events such as cases and care plans (2).
- Action Launcher, where users can start relevant quick actions, such as logging a call (3).
- Alerts, which shows a list of pending record alerts for the account (4).
- A component with Details, Related, and Interaction Summary tabs (5).



**How:** From Setup, in the Quick Find box, search for *Public Sector* and then select **Public Sector Service Excellence Settings**. Click the toggle to create the account Lightning record page for service representatives.

SEE ALSO:

[Salesforce Help: Configure and Use the Account Page for Service Representatives in Public Sector Solutions \(can be outdated or unavailable during release preview\)](#)

## Create Start-to-Finish Automation to Address Service Requests from Constituents with Service Process Studio

Design processes that automate agencies' responses to service requests from constituents, from intake to resolution, with Service Process Studio. Use data attributes, OmniScript forms, Apex classes, and record-triggered flows to create automation to quickly and reliably process service requests, such as updating a constituent's address. You can even use integration definitions to connect service processes to external systems.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Public Sector Solutions is enabled.

SEE ALSO:

[Salesforce Help: Configure and Use Service Process Studio in Public Sector Solutions \(can be outdated or unavailable during release preview\)](#)

## Capture and Store Key Information from Constituents Applying for Benefits, Licenses, and Permits

Create applications using Discovery Framework to gather information from constituents who apply for benefits, licenses, and permits. Capture the effective start and end dates for information such as income, expenses, and assets owned. Store the collected information including effective dates in the data model using DataRaptors.



**Where:** This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Public Sector Solutions is enabled.

SEE ALSO:

[Salesforce Help: Set Up Benefit Application Intake Using Discovery Framework](#)

## Create and Merge Party Relationship Groups Using Guided Workflows

Group household members in a party relationship group and specify member roles and relationships using the New Group workflow. Add related contacts, groups, and business accounts, and specify their relationships with the group and its members. Combine two party relationship groups, modify member roles and relationships, and the relationships of related contacts, groups, and business accounts using the Merge workflow. Review related information such as cases and complaints that merge along with the groups and create tasks to check these records later.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Public Sector Solutions is enabled.

SEE ALSO:

[Salesforce Help: Create Party Relationship Groups Using a Guided Workflow](#)

[Salesforce Help: Merge Party Relationship Groups Using a Guided Workflow](#)

## Help Agencies Manage Service Providers

Use the Provider Management data model to help agencies build and manage a network of providers. Caseworkers can find service providers from the data model to help constituents get the services they need.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Public Sector Solutions is enabled.

SEE ALSO:

[Salesforce Help: Provider Management in Public Sector Solutions](#)

## Set Up the Referral Intake Guided Flow Quickly with Out-of-the-Box Components

Use OmniStudio components out of the box to set up a guided flow for referral intake. Previously, you had to download an OmniStudio DataPack from the Salesforce Industries Process Library, deploy OmniStudio components in your Public Sector Solutions org, and then set up the guided flow.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Public Sector Solutions is enabled.

SEE ALSO:

[Salesforce Help: Set Up Referral Intake Guided Flow](#)

## Use Dynamic Assessments with Account, Contact, and Case

Do more with dynamic assessments by creating them for accounts, contacts, and cases. For example, create a questionnaire to periodically evaluate a child's safety on a child welfare case, or create an assessment for an individual or a group of individuals to determine whether a constituent is eligible for a benefit or service. And give caseworkers greater visibility into assessments by showing them in related lists for accounts, contact, or cases.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Public Sector Solutions is enabled.

SEE ALSO:

[Dynamic Assessments in Public Sector Solutions](#)

## Easily Manage Benefit Schedules and Sessions and Track Disbursed Benefits

Define and manage benefit schedules and sessions with ease using guided flows. See whether and how constituents exercise the benefits that you provide to them by using schedules and sessions. Enroll individuals or groups of individuals into benefit sessions on a set schedule, and then track their attendance. For example, enroll parents of a household in weekly counseling sessions, and then measure their participation by tracking their attendance.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Public Sector Solutions is enabled.

SEE ALSO:

[Define Benefit Schedules and Sessions in Public Sector Solutions](#)

[Use a Flow to Enroll Participants in Benefit Sessions from Care Plans](#)

[Track Attendance and Disbursements for Benefit Participants in Public Sector Solutions](#)

## Use the Data Model for Case Proceedings to Manage Court and Investigative Cases

Capture information pertaining to legal proceedings using the data model. Structure information regarding proceedings such as court action, mediation, arbitration, or appeal. Manage hearing details, violations, and infractions. Record the result at the end of the proceedings such as enforcement action or support plans for victims and perpetrators. Also record any case episodes such as probation, suspension, revocation, removal, or imprisonment.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Public Sector Solutions is enabled.

SEE ALSO:

[Case Proceedings in Public Sector Solutions](#)

## Quickly Preview Care Plans and Care Plan Templates

Easily preview the structure of the care plan template before publishing it. Help caseworkers quickly access a summary of the goals and benefit assignments in a care plan or benefit assignment record page using preview.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Public Sector Solutions is enabled.

SEE ALSO:

[Create a Care Plan for a Case](#)

## View Composable Case Management Objects in the Salesforce Mobile App

Provide investigators in the field instant access to critical information, improve communication and collaboration. Help them stay organized and on top of their tasks by providing them access to composable case management objects on the go from a mobile device. For example, investigators can now view the case, care plan details, and benefits received and add interaction summary notes at the point of investigation.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Public Sector Solutions is enabled.

## Award Grants to Constituents Using Grantmaking

Manage the whole lifecycle of the grants you give to constituents. Add details about the opportunities people or organizations can apply for. Provide an easy way to enter details of a budget down to the values for each category and period. Capture all of the information related to a grant application. Track the requirements after a grant's awarded. Provide a Grantmaking Experience Cloud site for your grant managers, applicants, and external reviewers to enter details directly in your grant records.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Public Sector Solutions is enabled.

**How:** Read about everything you can do with the new Grantmaking features in the Grantmaking release notes.

SEE ALSO:

[Grantmaking](#)

## Connect REST APIs

Connect REST APIs help customers, partners, and ISVs integrate with Salesforce software and UIs.

### Get Benefit Sessions of a Care Plan

Make a GET request to the new `/connect/careplan/benefit-session/{carePlanId}` resource.

New response body: Care Plan Benefit Session Output

### Create benefit disbursements for a benefit session

Make a POST request to the new

`/connect/benefit-assignment/{benefitAssignmentId}/benefit-disbursements` resource.

New request body: Benefit Disbursements for Benefit Session Input

New response body: Generic Output

### Define a party relationship group of individuals or trusts

Make a POST request to the new `/connect/group/group-definitions` resource.

New request body: Group Definition Input

New response body: Group Definition

**Merge the details, members, member relationships, and relationships of a party relationship group**

Make a POST request to the new `/connect/group/group-definitions/actions/merge` resource.

New request body: Group Merge Input

New response body: Group Definition

**Retrieve details from two party relationship groups**

Make a GET request to the new `/connect/group/group-fields` resource.

New required request parameter: `groupIds`

New response body: Group Fields

**Get related records of a party relationship group**

Make a GET request to the new `/connect/group/accounts/{accountId}/related-records` resource.

New response body: Group Related Entity

SEE ALSO:

[Public Sector Solutions Developer Guide: Connect APIs in Public Sector Solutions \(can be outdated or unavailable during release preview\)](#)

## 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 care plan feature in your org**

Use the new `enableCarePlansPreference` field on the `IndustriesSettings` metadata type.

SEE ALSO:

[Public Sector Solutions Developer Guide: IndustriesSettings \(can be outdated or unavailable during release preview\)](#)

## Rebate Management

Build flexible and scalable ship and debit programs using Ship and Debit Process Management. A ship and debit process helps you promptly react to market conditions and protect your partner's margins.

**IN THIS SECTION:**[Ship and Debit Process Management](#)

With Ship and Debit Process Management, manufacturers can create effective ship and debit programs that have the right mix of incentives. With ship and debit incentives, partners can competitively price products to attract new customers and to retain existing customers, and can react to market conditions while protecting partners' margins. Manufacturers can set up flat discounts and tiered pricing benefits to compensate partners when partners competitively price products. They can seamlessly collaborate on ship and debit claims and proofs-of-sale by using the Experience Cloud site. Manufacturers can automate the validation of claims and the calculation of payouts with preconfigured, scalable process automation templates.

[Data Processing Engine Enhancements](#)

Aggregate transactions and streamline rebate payout calculations using Data Processing Engine. Use a forecast node in a Data Processing Engine definition to generate forecasts based on today's data to make informed business decisions. Use variables of type expression in a formula node when you don't know the exact evaluation or calculation logic when creating a definition.

[New and Changed Objects in Rebate Management](#)

Rebate Management includes these new and changed objects.

## Ship and Debit Process Management

With Ship and Debit Process Management, manufacturers can create effective ship and debit programs that have the right mix of incentives. With ship and debit incentives, partners can competitively price products to attract new customers and to retain existing customers, and can react to market conditions while protecting partners' margins. Manufacturers can set up flat discounts and tiered pricing benefits to compensate partners when partners competitively price products. They can seamlessly collaborate on ship and debit claims and proofs-of-sale by using the Experience Cloud site. Manufacturers can automate the validation of claims and the calculation of payouts with preconfigured, scalable process automation templates.

**IN THIS SECTION:**[Incentivize Partners Through Effective Ship and Debit Programs](#)

Create robust ship and debit programs and specify details like program duration and description. Make your ship and debit programs flexible by processing claims and payouts on demand. Enroll partners, distributors, and dealers as accounts, and end-customers as ship-to accounts.

[Compensate Partners for Reactive Pricing Through Special Prices and Discounts](#)

Protect the margins of your partners by compensating them for the competitive pricing of their products. Use special pricing terms to set up flat discounts for partners. Use special pricing term benefits to craft tiered incentive structures that have different qualifying thresholds and special prices.

[Collaborate with Partners on Claims and Proofs of Sale](#)

Enable your partners to effortlessly submit detailed ship and debit claims and to view the status of the claims. Capture product, pricing, transaction, and payout information about a claim. Ship and debit claim analysts can validate claims with the proof of sale documents submitted by the partners.

[Automate Ship and Debit Claims Processing with Scalable Templates](#)

Validate ship and debit claims and calculate payouts by using point-and-click process automation to minimize errors and to reduce turnaround times. Use preconfigured end-to-end, extensible templates to process claims for flows and Business Rules Engine expression sets. Extend and customize these flow and expression set templates to suit your business needs.

## Incentivize Partners Through Effective Ship and Debit Programs

Create robust ship and debit programs and specify details like program duration and description. Make your ship and debit programs flexible by processing claims and payouts on demand. Enroll partners, distributors, and dealers as accounts, and end-customers as ship-to accounts.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions with Ship and Debit Process Management.

**Who:** This feature is available to users with the Ship and Debit Process Management Admin permission set.

**How:** To create a ship and debit program, from the App Launcher, select **Rebate Programs**, and then click **New**.

The screenshot shows a Salesforce record for a 'Rebate Program' titled 'Semiconductor Distributors Ship and Debit Program'. At the top, there is a summary bar with fields: Status (Active), Start Date (2/15/2023), End Date (2/28/2024), and Frequency (On Demand). Below this is a 'Details' tab with two sub-tabs: 'Information' and 'Related'. The 'Information' sub-tab is active, showing a list of fields with edit icons: Name (Semiconductor Distributors Ship and Debit Program), Status (Active), Start Date (2/15/2023), End Date (2/28/2024), Type (Ship And Debit), Program Reference Number (12345), Currency ISO Code (USD - U.S. Dollar), and Payout Calculation Days (5). The 'Payout Information' sub-tab is also visible, showing Frequency (On Demand) and Transaction Grace Days (5).

To enroll members, on the Members related list of a rebate program record, click **Add Member**.

The screenshot shows the 'New Rebate Program Member' form. It has a 'Required Information' section with fields for Name (Acme), Account (Acme), Status (Active), and Currency ISO Code (USD - U.S. Dollar). There are also dropdowns for Program (Semiconductor Distributors Ship and De) and Ship To Account (Tag Laptops). A 'Summary' section at the bottom shows Last Activation Date and Last Deactivation Date. At the bottom of the form are buttons for 'Cancel', 'Save & New', and 'Save'.

SEE ALSO:

[Create a Ship and Debit Program](#)

## Compensate Partners for Reactive Pricing Through Special Prices and Discounts

Protect the margins of your partners by compensating them for the competitive pricing of their products. Use special pricing terms to set up flat discounts for partners. Use special pricing term benefits to craft tiered incentive structures that have different qualifying thresholds and special prices.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions with Ship and Debit Process Management.

**Who:** This feature is available to users with the Ship and Debit Process Management Admin permission set.

**How:** To create a special pricing term, from the App Launcher, select **Rebate Partner Special Pricing Terms**, and then click **New**.

Rebate Partner Special Pricing Term

Standard Special Pricing Term

Related

Details

Information

Name

Standard Special Pricing Term

Rebate Program Member

Acme Partners

Status

Active

Product Information

Product

NXP200

Product Quantity

10,000.00

Product Quantity Unit of Measure

Pricing Information

Sale Price Per Unit

USD 10.00

Reference Price Per Unit

USD 8.00

Discount

Discount By Percent

☐

To create a special pricing term benefit, on the Benefits related list of a special pricing term record, click **New**.

Rebate Partner Special Pricing Term Benefit

Silver Tier Benefit

Related

Details

Information

Name

Silver Tier Benefit

Rebate Partner Special Pricing Term

Standard Special Pricing Term

Pricing Information

Reference Price Per Unit

USD 23.00

Discount By Percent

☐

Discount

Quantity Range

Minimum Quantity

10.00

Maximum Quantity

20.00

Date Range

Additional Information

SEE ALSO:

[Compensate Your Partners for Competitive Pricing with Special Prices and Discounts](#)

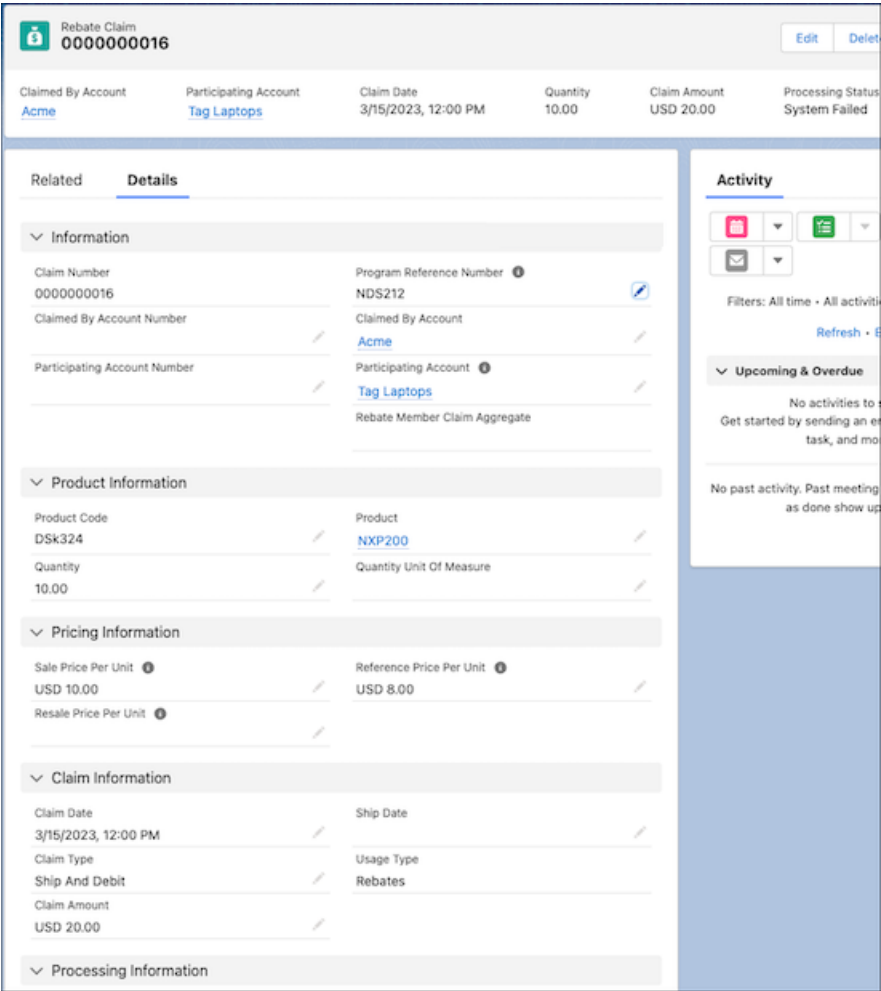
Collaborate with Partners on Claims and Proofs of Sale

Enable your partners to effortlessly submit detailed ship and debit claims and to view the status of the claims. Capture product, pricing, transaction, and payout information about a claim. Ship and debit claim analysts can validate claims with the proof of sale documents submitted by the partners.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions with Ship and Debit Process Management.

**Who:** This feature is available to users with the Ship and Debit Process Management for Experience Cloud Users and Ship and Debit Process Management User permission sets.

**How:** As a partner user, to submit the ship and debit claim, create a rebate claim record in your Experience Cloud site.



To submit a proof of sale document as a CSV file, click **Upload Document** on the home page of the Experience Cloud site.

As a ship and debit claim analyst, track the rebate claim records created by partners. From the App Launcher, select **Rebate Claims**, and open a record from the list view.

To track proof-of-sale documents, Salesforce admins can convert the records in the CSV file into Transaction Journal records.

SEE ALSO:

[Manage Rebate and Ship and Debit Claims](#)

**Automate Ship and Debit Claims Processing with Scalable Templates**

Validate ship and debit claims and calculate payouts by using point-and-click process automation to minimize errors and to reduce turnaround times. Use preconfigured end-to-end, extensible templates to process claims for flows and Business Rules Engine expression sets. Extend and customize these flow and expression set templates to suit your business needs.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions with Ship and Debit Process Management.

**Who:** This feature is available to users with the Ship and Debit Process Management Admin permission set.



**How:** Use the flow and Business Rules Engine expression set template that come with Ship and Debit Process Management.

SEE ALSO:

[Process Ship and Debit Claims](#)

## Data Processing Engine Enhancements

Aggregate transactions and streamline rebate payout calculations using Data Processing Engine. Use a forecast node in a Data Processing Engine definition to generate forecasts based on today's data to make informed business decisions. Use variables of type expression in a formula node when you don't know the exact evaluation or calculation logic when creating a definition.

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

**Who:** This feature is available only to users who have the Data Pipelines Base User permission set.

SEE ALSO:

[Data Processing Engine](#)

## New and Changed Objects in Rebate Management

Rebate Management includes these new and changed objects.

### New Objects

Here are the new objects in Rebate Management.

**Store details about manual adjustments to the rebate claim amounts**

Use the new RebateClaimAdjustment object.

**Store the post calculation summary of journal transactions by member, period, and rebate type**

Use the new RebateMemberClaimAggregate object.

**Store details about incentives partners get when they competitively price products**

Use the new RebatePartnerSpecialPrcTrm object.

**Store details about tiers to differentiate incentives based on product quantity or time period**

Use the new RebatePtnrSpclPrcTrmBnft object.

### Changed Objects

Here are the changed objects in Rebate Management.

**Store details about a ship and debit claim**

Use the new ShipDate, CalculatedAmount, TotalAdjustmentAmount, ApprovedAmount, TransactionIdentifier, ShippedTransactionIdentifier, RebatePaymentId, ReceivedDocumentId, QuantityUnitOfMeasureId, UsageType, ClaimType, and RebateMemberClaimAggregateId fields on the RebateClaim object.

**Determine whether a rebate program is of the standard rebates or ship and debit type**

Use the new Type field on the RebateProgram object.

**Determine whether ship and debit payouts are processed on demand**

Use the new OnDemand value on the `Frequency` field on the `RebateProgram` object.

SEE ALSO:

[Rebate Management Developer Guide: Rebate Management Standard Objects](#)

## Communications Cloud

Salesforce Industries Communications cloud extends the digital omni-channel capabilities of Salesforce. The Communications cloud includes Configure, Price, Quote (Industries CPQ), Enterprise Product Catalog (EPC), order capture, Digital Commerce, Industries Order Management, and Contract Lifecycle Management cloud solutions. The Communications cloud also includes cloud-specific application suites.

Learn about what's in this release in the [Communications Cloud Release Notes](#)

## Energy and Utilities Cloud

Energy & Utilities Cloud (E&U Cloud) combines and extends the full power of Salesforce Sales and Service Cloud and the Salesforce Platform into an industry-specific solution for utilities, retail energy, and modern energy services companies.

Learn about what's in this release in the [Energy and Utilities Cloud Release Notes](#)

## Industries Order Management

Industries Order Management (also called Order Management, IOM or just OM) is a product module that delivers best-in-class, next-generation order management capabilities to communications, media and energy companies.

Learn about what's in this release in the [Industries Order Management Release Notes](#)

## Media Cloud

Salesforce Industries enables you to attract, engage, and support customers from anywhere, maximize lifetime value, and improve operational efficiency across the media value chain.

Learn about what's in this release in the [Media Cloud Release Notes](#)

## Salesforce Contracts

The Salesforce Contracts app allows customers to manage the end-to-end lifecycle of Contracts. Contracts can be associated with opportunities, orders, quotes, standard Salesforce objects, and custom objects. A contract lifecycle management is crucial to the overall health of the sales processes in an organization. The Salesforce Contracts app gives you complete control over the sales process integration, contract management process, and contract lifecycle that starts from contract authoring to activation.

Learn about what's in this release in the [Salesforce Contracts Cloud Release Notes](#)

## 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 Features

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 Action Plans, Data Processing Engine, Discovery Framework, Identity Verification, and much more.

### IN THIS SECTION:

#### [Action Launcher](#)

Contact center agents (CCAs) can quickly resolve customer requests by launching out-of-the-box OmniScripts. CCAs can select an OmniScript, flow, or flow orchestration to navigate to the action's previously opened subtab without losing the information entered earlier. CCAs can open quick actions containing a Visualforce page. Furthermore, CCAs can benefit from improved accessibility due to compliance with the color contrast requirements of Web Content Accessibility Guidelines (WCAG) 2.1. Additionally, CCAs can see up to 10 recently used actions listed in Action Launcher. Administrators can enable self-service for customers through Experience Cloud. Also, administrators can now select the Engagement Interaction object while creating a deployment.

#### [Action Plans](#)

Design and run complex business processes by using the increased task dependency limit in action plan templates.

#### [Actionable List Members](#)

Large actionable lists are now configured asynchronously. List creators can update the engagement status of prospects, including existing customers. In addition, list creators can perform bulk actions on prospect records and configure the sort field and the order in which prospects are sorted in the Outreach List component.

#### [Actionable Segmentation \(Generally Available\)](#)

Segment and curate similar client profiles, and design timely and personalized client outreach programs with Actionable Segmentation.

#### [AI Accelerator and Scoring Framework](#)

Get real-time predictions for use cases across multiple Industries clouds by using AI Accelerator. Build generic propensity models without writing code by using Scoring Framework. Use AI Accelerator to configure and deploy Einstein Discovery models, and show predictions and Einstein Next Best Action recommendations on record pages by using the AI Accelerator—Einstein Predictions & Recommendations component.

#### [Audit Trail](#)

Monitor and analyze customers' secondary identity verification audit records to detect potential cases of compliance fraud and identity breach. Access all filter options in a pop-up window. Filter audit records based on verification status and initiating attendee. View communication channel and verification type information. For audit records of secondary verification type, view primary and secondary verification details by clicking a hyperlink in the Initiating Attendee Type column. Export audit records in CSV format. Get email notification about the success or failure of the export request. Download or delete the exported file using the Audit Trail Export Dashboard.

#### [Batch Management](#)

Batch management now supports running Data Processing Engine definitions that include Forecast nodes.

### Business Rules Engine

To understand the reasoning behind the output of an expression set that has Decision Explorer enabled, capture action logs each time the expression set is run from Salesforce Flow. To simulate an expression set version that has a large number of input variables, pass the variable values in JSON format. Export decision matrix versions to DMN files and reuse them outside Business Rules Engine.

### Data Processing Engine

Use a forecast node in a Data Processing Engine definition to generate forecasts based on today's data to make informed business decisions. Use variables of type expression in a formula node when you don't know the exact evaluation or calculation logic when creating a definition.

### Discovery Framework Enhancements

Now you can edit a signature before submitting the assessment form. Guest users can access OmniScripts of the Discovery Framework type on Experience Cloud sites. Read about these enhancements and more.

### Einstein Relationship Insights

Expand the scope of your relationship recommendations by exploring case notes captured by interaction summaries.

### Engagement

Contact center agents (CCAs) can now accept customer requests through standard SMS, standard and enhanced Facebook Messenger, and enhanced WhatsApp. CCAs can create list views to filter their Engagement Attendee, Engagement Interaction, and Engagement Topic records. In addition, CCAs can experience better user interface performance due to the migration of engagement-related user interface components from Aura to Lightning Web Component (LWC). Moreover, CCAs can benefit from improved accessibility due to compliance with the color contrast requirements of Web Content Accessibility Guidelines (WCAG) 2.1. Administrators can create LWC quick actions on Engagement Interaction, Engagement Attendee, and Engagement Topic objects.

### Identity Verification

Contact center agents (CCAs) can now verify the identity of customers who contact through standard SMS, standard and enhanced Facebook Messenger, and enhanced WhatsApp and add customers' verification answers to form fields. Administrators can configure whether a verification field is shown as a form or radio button to CCAs. In addition administrators can configure the record page that's shown to CCAs after identity verification is successful. The identity verification flows, which have new names, have been updated, and developers can use a new API for form-based identity verification.

### Industry Integration Solutions

#### Intelligent Document Reader

Automatically extract text from uploaded documents and get the active OCR template details by using Flow actions.

#### Intelligent Form Reader

Automatically extract text from uploaded documents and get the active OCR template details by using Flow actions.

### Outreach List

Sales and service agents can now search for and select an actionable list to view the associated prospects, including existing customers. Actionable lists are grouped by their priority. Agents can now see the assigned prospects in accordion view. The field and value used to sort the prospects are also shown to agents, and prospects are grouped by their engagement status. In addition, agents can update the engagement status of prospects and call them. Developers can use two new APIs to get actionable list records and metadata.

### Record Alerts

Provide access to record alerts. Refine record alerts by using Business Rules Engine. Show alerts from your external systems using Data Consumption Framework.

### Service Process Studio

Do more with Service Process Studio. Admins can clone service process definitions, group the service process data attributes into sections and organize these sections, and define lookup-type extended data attributes. Agents can view all the service process data attributes on the Case Details Lightning component.

## Action Launcher

Contact center agents (CCAs) can quickly resolve customer requests by launching out-of-the-box OmniScripts. CCAs can select an OmniScript, flow, or flow orchestration to navigate to the action's previously opened subtab without losing the information entered earlier. CCAs can open quick actions containing a Visualforce page. Furthermore, CCAs can benefit from improved accessibility due to compliance with the color contrast requirements of Web Content Accessibility Guidelines (WCAG) 2.1. Additionally, CCAs can see up to 10 recently used actions listed in Action Launcher. Administrators can enable self-service for customers through Experience Cloud. Also, administrators can now select the Engagement Interaction object while creating a deployment.

### IN THIS SECTION:

#### [Help Customers by Quickly Launching Out-of-the-Box OmniScripts](#)

Contact center agents (CCAs) can now provide prompt customer service by launching out-of-the-box OmniScripts directly from Action Launcher.

#### [Improve Customer Experience by Quickly Switching Between Actions](#)

Contact center agents (CCAs) can now quickly switch to the tab that contains a previously launched action by clicking the action again in Action Launcher. The information entered in the action earlier persists when CCAs revisit the tab. CCAs no longer need to search for a specific tab containing an action or lose the previously entered information in an action.

#### [Support Customers by Quickly Launching Quick Actions Containing a Visualforce Page](#)

Contact center agents (CCAs) can now provide prompt service by launching quick actions that contain a Visualforce page directly from Action Launcher.

#### [Increase User Satisfaction Through Enhanced Accessibility](#)

Action Launcher is now compliant with the color contrast requirements of Web Content Accessibility Guidelines (WCAG) 2.1. The compliance improves accessibility for contact center agents who find it difficult to differentiate between some color combinations.

#### [Boost the Productivity of Contact Center Agents with Recently Used Actions](#)

Give your contact center agents' (CCAs) easy access to up to 10 recently used actions in Action Launcher. Recently used actions help CCAs respond quickly to repetitive customer requests and save time on searching for actions.

#### [Allow Customers to Access Information and Resolve Issues by Themselves](#)

Extend sales and service processes from your contact center directly into a customer self-service experience. Allow customers to perform actions, such as submit a case online, or guide them through common customer service processes.

#### [Streamline Customer Engagement by Quickly Launching Engagement Interaction Actions](#)

Include the actions related to the Engagement Interaction object in a deployment. Contact center agents (CCAs) can help customers by quickly launching the actions from Action Launcher.

### SEE ALSO:

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

## Help Customers by Quickly Launching Out-of-the-Box OmniScripts

Contact center agents (CCAs) can now provide prompt customer service by launching out-of-the-box OmniScripts directly from Action Launcher.

**Where:** This change applies to Lightning Experience in clouds where Action Launcher is available.

**Who:** To use this feature, users need the Industry Service Excellence add-on license.

**How:** From Setup, on the Action Launcher page, create a deployment by selecting the **OmniScripts** checkbox. Then, select objects and the associated out-of-the-box OmniScripts that you want to include in the deployment.

Next, add the Action Launcher component to the appropriate Lightning record page through Lightning App Builder. Click the Action Launcher component. In the Properties panel, select the deployment that you created from the Action Launcher Deployment dropdown list. Save your changes, and then activate your page, if necessary.

## Improve Customer Experience by Quickly Switching Between Actions

Contact center agents (CCAs) can now quickly switch to the tab that contains a previously launched action by clicking the action again in Action Launcher. The information entered in the action earlier persists when CCAs revisit the tab. CCAs no longer need to search for a specific tab containing an action or lose the previously entered information in an action.

**Where:** This change applies to Lightning Experience in clouds where Action Launcher is available.

**Who:** To use this feature, users need the Industry Service Excellence add-on license.

**How:** Launch an action from Action Launcher. The action launches in a new tab. Switch back to the tab that contains Action Launcher. Launch the same action again. Action Launcher redirects you to the tab containing the action.

## Support Customers by Quickly Launching Quick Actions Containing a Visualforce Page

Contact center agents (CCAs) can now provide prompt service by launching quick actions that contain a Visualforce page directly from Action Launcher.

**Where:** This change applies to Lightning Experience in clouds where Action Launcher is available.

**Who:** To use this feature, users need the Industry Service Excellence add-on license.

**How:** From Setup, on the Action Launcher page, create a deployment by selecting the **Flows and quick actions** checkbox. Then, select objects and the associated quick actions that contain a Visualforce page you want to include in Action Launcher.

Next, add the Action Launcher component to the appropriate Lightning record page through Lightning App Builder. Click the Action Launcher component. In the Properties panel, select the deployment that you created from the Action Launcher Deployment dropdown list. Save your changes, and then activate your page, if necessary.

## Increase User Satisfaction Through Enhanced Accessibility

Action Launcher is now compliant with the color contrast requirements of Web Content Accessibility Guidelines (WCAG) 2.1. The compliance improves accessibility for contact center agents who find it difficult to differentiate between some color combinations.

**Where:** This change applies to Lightning Experience in clouds where Action Launcher is available.

**Who:** To use this feature, users need the Industry Service Excellence add-on license.

## Boost the Productivity of Contact Center Agents with Recently Used Actions

Give your contact center agents' (CCAs) easy access to up to 10 recently used actions in Action Launcher. Recently used actions help CCAs respond quickly to repetitive customer requests and save time on searching for actions.

**Where:** This change applies to Lightning Experience in clouds where Action Launcher is available.

**Who:** To use this feature, users need the Industry Service Excellence add-on license.

**How:** From Setup, on the Action Launcher page, create a deployment by selecting the type of actions, objects, and associated actions that you want to include in Action Launcher.

Next, add the Action Launcher component to a Lightning record page through Lightning App Builder. Click the Action Launcher component. In the Properties panel, select the deployment that you created from the Action Launcher Deployment dropdown list. Save your changes, and then activate your page, if necessary.

After launching one or more actions, refresh the page to see the recently used actions in the Action Launcher list.

## Allow Customers to Access Information and Resolve Issues by Themselves

Extend sales and service processes from your contact center directly into a customer self-service experience. Allow customers to perform actions, such as submit a case online, or guide them through common customer service processes.

**Where:** This change applies to Lightning Experience in clouds where Action Launcher is available.

**Who:** To use this feature, users need the Industry Service Excellence add-on license.

**How:** From Setup, on the Action Launcher page, create a deployment by selecting the type of actions, objects, and associated actions that you want to include in Action Launcher.

Next, add the Action Launcher component to an Experience Cloud site page. Click the Action Launcher component. Select the required deployment from the Action Launcher pop-up window. Publish the site.

## Streamline Customer Engagement by Quickly Launching Engagement Interaction Actions

Include the actions related to the Engagement Interaction object in a deployment. Contact center agents (CCAs) can help customers by quickly launching the actions from Action Launcher.

**Where:** This change applies to Lightning Experience in clouds where Action Launcher is available.

**Who:** To use this feature, users need the Industry Service Excellence add-on license.

**How:** From Setup, on the Action Launcher page, create a deployment by selecting the type of actions, Engagement Interaction object, and associated actions that you want to include in Action Launcher.

Next, add the Action Launcher component to an Engagement Interaction record page through Lightning App Builder. Click the Action Launcher component. In the Properties panel, select the deployment that you created from the Action Launcher Deployment dropdown list. Save your changes, and then activate your page, if necessary.

## Action Plans

Design and run complex business processes by using the increased task dependency limit in action plan templates.

### IN THIS SECTION:

#### [Include More Task Dependencies in Action Plan Templates](#)

An action plan template can now have a maximum of 24 task dependencies in a sequence. Previously, an action plan template supported a maximum of four task dependencies in a sequence.

## Include More Task Dependencies in Action Plan Templates

An action plan template can now have a maximum of 24 task dependencies in a sequence. Previously, an action plan template supported a maximum of four task dependencies in a sequence.

**Where:** This change applies to Lightning Experience.

**How:** When you create or edit a task, add the prerequisite tasks from the Available Tasks list in the Task Dependencies section.

## Actionable List Members

Large actionable lists are now configured asynchronously. List creators can update the engagement status of prospects, including existing customers. In addition, list creators can perform bulk actions on prospect records and configure the sort field and the order in which prospects are sorted in the Outreach List component.

## IN THIS SECTION:

[Large Actionable Lists Are Configured Asynchronously](#)

To improve performance, actionable lists that contain more than 200 records are configured asynchronously. The configuration occurs in the background, so list creators can continue working. List creators receive an email when the configuration is completed.

[Manage Engagement Status of Prospects Efficiently](#)

Change a prospect's engagement status with one click using the new Change Status option next to a prospect's record.

[Save Time and Improve Efficiency Using Bulk Actions](#)

List creators can now perform bulk actions on multiple prospects. By simplifying repetitive actions, list creators can enjoy a better user experience.

[Sort Prospects to Enhance Team's Success](#)

List creators can specify the order in which agents must contact prospects by configuring the field and order for sorting prospects in the Outreach List component.

[Changed Object in Actionable List Members](#)

Sort prospects in Outreach List through the changed object.

## SEE ALSO:

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

## Large Actionable Lists Are Configured Asynchronously

To improve performance, actionable lists that contain more than 200 records are configured asynchronously. The configuration occurs in the background, so list creators can continue working. List creators receive an email when the configuration is completed.

**Where:** This change applies to Lightning Experience in clouds where Actionable List Members is available.

**Who:** To use this feature, users need the Industry Sales Excellence add-on license with Actionable Segmentation permission set.

**How:** Select an actionable list. Then, click **Configure List** to configure the list. If the actionable list has more than 200 records, the request is completed asynchronously.

## Manage Engagement Status of Prospects Efficiently

Change a prospect's engagement status with one click using the new Change Status option next to a prospect's record.

**Where:** This change applies to Lightning Experience in clouds where Actionable List Members is available.

**Who:** To use this feature, users need the Industry Sales Excellence add-on license with Actionable Segmentation permission set.

## Save Time and Improve Efficiency Using Bulk Actions

List creators can now perform bulk actions on multiple prospects. By simplifying repetitive actions, list creators can enjoy a better user experience.

**Where:** This change applies to Lightning Experience in clouds where Actionable List Members is available.

**Who:** To use this feature, users need the Industry Sales Excellence add-on license with Actionable Segmentation permission set.

**How:** Select an actionable list. Then, select prospect records in the Actionable List Members component and click the bulk action that you want to perform on the selected records.



## Sort Prospects to Enhance Team's Success

List creators can specify the order in which agents must contact prospects by configuring the field and order for sorting prospects in the Outreach List component.

**Where:** This change applies to Lightning Experience in clouds where Actionable List Members is available.

**Who:** To use this feature, users need the Industry Sales Excellence add-on license with Actionable Segmentation permission set.

**How:** Select an actionable list. Then, click **Configure List** and specify the field and order for sorting the prospects in the Outreach List component.

## Changed Object in Actionable List Members

Sort prospects in Outreach List through the changed object.

### Store the default field name used for sorting the actionable list members in Outreach List.

Use the new `DefaultSortMemberField` field on the `ActionableList` object.

### Specify the default sort order used for sorting the actionable list members in Outreach List.

Use the new `MemberSortOrder` field on the `ActionableList` object.

## Actionable Segmentation (Generally Available)

Segment and curate similar client profiles, and design timely and personalized client outreach programs with Actionable Segmentation.

### IN THIS SECTION:

#### [Select Dataset Records in Bulk for Actionable Lists](#)

Help your users save time when creating actionable lists. As a list creator, you can select and add up to 10,000 dataset records to an actionable list by using the bulk select option. Previously, list creators manually selected and added up to 200 records to an actionable list. The bulk select option is available only for the new actionable list creation flow.

#### [Filter Dataset Records Smarter with Custom Filter Logic](#)

Your users can now create more fine-tuned actionable lists using the new option to define custom filter logic. This custom filter logic lets users search for records at a more granular level. Previously, only the records that matched all specified filter criteria were shown in the results. Now, you can define custom filter logic with more filter conditions using parentheses and the AND and OR operators.

#### [Share Actionable Lists with Colleagues](#)

Users can now share actionable lists with other Salesforce users. The list creator can define its sharing settings and view the sharing hierarchy from the action menu of the list's details page.

#### [Help Executives Manage Actionable Lists Better with List Status](#)

Help your sales or service executives get a quick picture of the status of their lists using the new List Status field for Actionable Lists. Customize the list status values so that the list managers can use these values to set the list status. Having detailed and granular list status values helps sales or service agents to get a more realistic picture of the list activity status.

#### [Sort Dataset Records in Actionable List Builder](#)

Your users can now easily review dataset records with sortable column headers. The list builder page displays the dataset records associated with the list definition, which is used to create an actionable list. You can now sort these records by one of the dataset field columns.

#### [Customize the Display Format for Dataset Fields in Actionable List Builder](#)

You can now set the display format of dataset fields in Actionable List Builder. Customizing the display format helps your list creators visualize data better when creating actionable lists.

### Delete Unneeded Actionable List Definitions

You can now delete actionable list definitions that you don't use, including draft definitions. The ability to clean up these unused definitions or drafts helps you navigate through relevant data more easily.

### Track API Call Usage and License Validity for Queries for DataPipelines

To ensure a smooth actionable list creation experience, monitor the Queries for DataPipelines API call usage and Query for Datapipelines User license validity on the Actionable Segmentation Settings page. The Queries for DataPipelines service enables actionable list creators to retrieve records from datasets through API calls. Query for Datapipelines User has a monthly limit of 2,500 API calls. Track the API call usage statistics and upgrade the license if you require more API calls.

### New and Changed Objects

Access more data with these new and changed objects.

### Metadata API

Access more metadata through these changed metadata types.

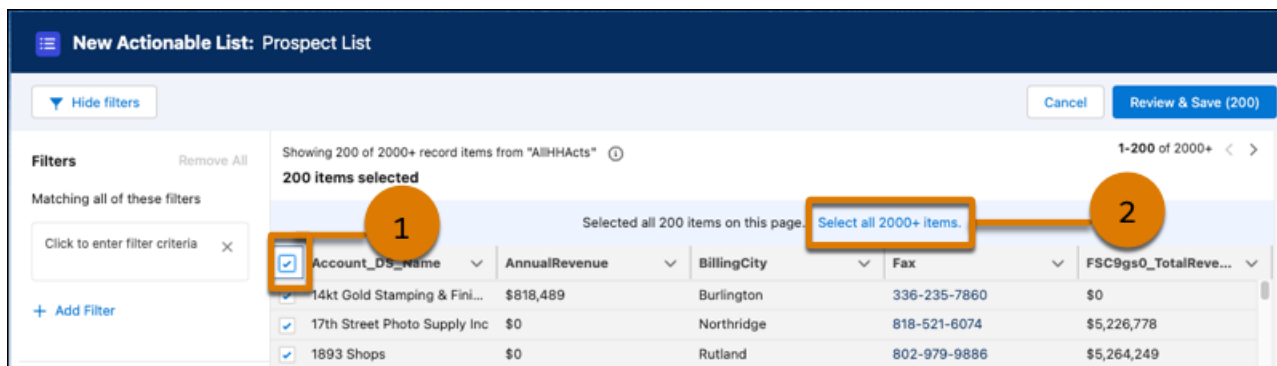
## Select Dataset Records in Bulk for Actionable Lists

Help your users save time when creating actionable lists. As a list creator, you can select and add up to 10,000 dataset records to an actionable list by using the bulk select option. Previously, list creators manually selected and added up to 200 records to an actionable list. The bulk select option is available only for the new actionable list creation flow.

**Where:** This change applies to Lightning Experience in clouds that have Industry Sales Excellence Add On and Query for Datapipelines User licenses.

**Who:** To use this feature, users need the Actionable Segmentation permission set and the Query for Datapipelines User permission set.

**How:** On the Actionable List Builder page, select the column header (1) to select all 200 items on this page, and then select **Select all <count> items** (2). If the number of dataset records is more than 10,000, modify the filter criteria and select up to 10,000 items.



SEE ALSO:

[Select Dataset Records for Actionable Lists \(can be outdated or unavailable during release preview\)](#)

## Filter Dataset Records Smarter with Custom Filter Logic

Your users can now create more fine-tuned actionable lists using the new option to define custom filter logic. This custom filter logic lets users search for records at a more granular level. Previously, only the records that matched all specified filter criteria were shown in the results. Now, you can define custom filter logic with more filter conditions using parentheses and the AND and OR operators.

**Where:** This change applies to Lightning Experience in clouds that have Industry Sales Excellence Add On and Query for Datapipelines User licenses.

**Who:** To use this feature, users need the Actionable Segmentation permission set and the Query for Datapipelines User permission set.

**How:** On the Actionable List Builder page, add individual filters to define the filter criteria and click **Add Filter Logic** (1).

**Filters** Remove All

Matching all of these filters

- TotalDeposits  
Greater than 50,000
- AUM  
Greater than 100,000
- City  
Equals Los Angeles

+ Add Filter 1 Add Filter Logic

Add the custom logic conditions (1) and click **Apply** (2).

**Filters** Remove All

Matching all of these filters

1. TotalDeposits  
Greater than 50,000
2. AUM  
Greater than 100,000
3. City  
Equals Los Angeles

+ Add Filter Remove Filter Logic

Filter Logic 1

(1 OR 2) AND 3

2 Apply

SEE ALSO:

[Create a Custom Filter Logic \(can be outdated or unavailable during release preview\)](#)

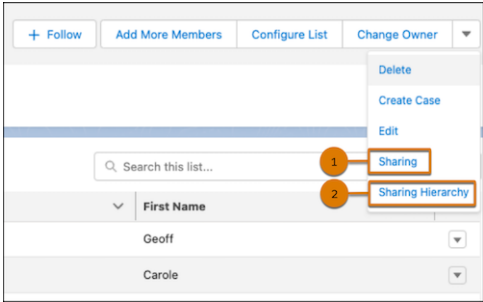
## Share Actionable Lists with Colleagues

Users can now share actionable lists with other Salesforce users. The list creator can define its sharing settings and view the sharing hierarchy from the action menu of the list's details page.

**Where:** This change applies to Lightning Experience in clouds that have Industry Sales Excellence Add On and Query for Datapipelines User licenses.

**Who:** To use this feature, users need the Actionable Segmentation permission set and the Query for Datapipelines User permission set.

**How:** To share a list with a new user or group, open the list details page and select **Sharing** (1). To view who already has access to this list, select **Sharing Hierarchy** (2).



SEE ALSO:  
[Share Actionable Lists \(can be outdated or unavailable during release preview\)](#)

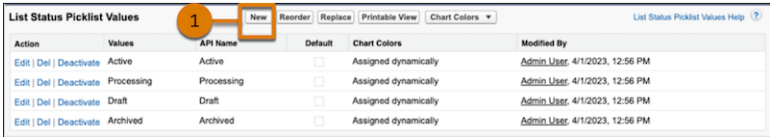
Help Executives Manage Actionable Lists Better with List Status

Help your sales or service executives get a quick picture of the status of their lists using the new List Status field for Actionable Lists. Customize the list status values so that the list managers can use these values to set the list status. Having detailed and granular list status values helps sales or service agents to get a more realistic picture of the list activity status.

**Where:** This change applies to Lightning Experience in clouds that have Industry Sales Excellence Add On and Query for Datapipelines User licenses.

**Who:** To use this feature, users need the Actionable Segmentation permission set and the Query for Datapipelines User permission set.

**How:** From the object management settings for Actionable List, select **Fields & Relationships**, and click **List Status**. Click **New** (1) and add status values to List Status Picklist Values.



SEE ALSO:  
[Set Actionable List Status Values \(can be outdated or unavailable during release preview\)](#)

Sort Dataset Records in Actionable List Builder

Your users can now easily review dataset records with sortable column headers. The list builder page displays the dataset records associated with the list definition, which is used to create an actionable list. You can now sort these records by one of the dataset field columns.

**Where:** This change applies to Lightning Experience in clouds that have Industry Sales Excellence Add On and Query for Datapipelines User licenses.

**Who:** To use this feature, users need the Actionable Segmentation permission set and the Query for Datapipelines User permission set.

**How:** To sort the column alphanumerically, open the actionable list, and hover over a column header, and click the up or down arrow (1).

Showing 200 of 2000+ record items from "AllHHActs" ⓘ

**0 items selected**

<input type="checkbox"/> Account_DS_Name ▾	AnnualRevenue ▾
<input type="checkbox"/> Acme	\$100,000,000
<input type="checkbox"/> Kwnk Am 67	\$1,998,002

SEE ALSO:

[Sort Dataset Records in Actionable List Builder \(can be outdated or unavailable during release preview\)](#)

## Customize the Display Format for Dataset Fields in Actionable List Builder

You can now set the display format of dataset fields in Actionable List Builder. Customizing the display format helps your list creators visualize data better when creating actionable lists.

**Where:** This change applies to Lightning Experience in clouds that have Industry Sales Excellence Add On and Query for Datapipelines User licenses.

**Who:** To use this feature, users need the Actionable Segmentation permission set and the Query for Datapipelines User permission set.

**How:** From Setup, in the Quick Find box, enter *Actionable Segmentation*, and then select **Actionable Segmentation Settings**. Click the action menu of the actionable list definition, and select **Edit Column Display Format** (1).

List Definitions (4) Refresh Dataset Status

List Definition Na...	Object	Dataset Name	Dataset Status	Visible Columns	List Member Stat...	Active	
GetMoreAccounts	Account	AllHHActs ⓘ	Completed	5 selected out of 7	3 Rows	<input checked="" type="checkbox"/>	⋮
getAlIcontacts	Contact	getAlIcontacts ⓘ	Completed	4 selected out of 5		<input type="checkbox"/>	⋮

Check the suggested column formats and if suitable, click **Apply Suggestions** (1). Otherwise, you can select a different column format for each of these fields and save your changes.

**Edit Column Display Format**

⚡ Check the suggested column formats and if suitable, click Apply Suggestions. 1 Apply Suggestions

**Format of Visible Columns**

AnnualRevenue	Currency ▾	⚡ Suggested: Currency
BillingCountry	Text ▾	⚡ Suggested: Text
OwnerId	Text ▾	⚡ Suggested: Text

Cancel Save

SEE ALSO:

[Set the Display Format for Actionable List Columns \(can be outdated or unavailable during release preview\)](#)


## Delete Unneeded Actionable List Definitions

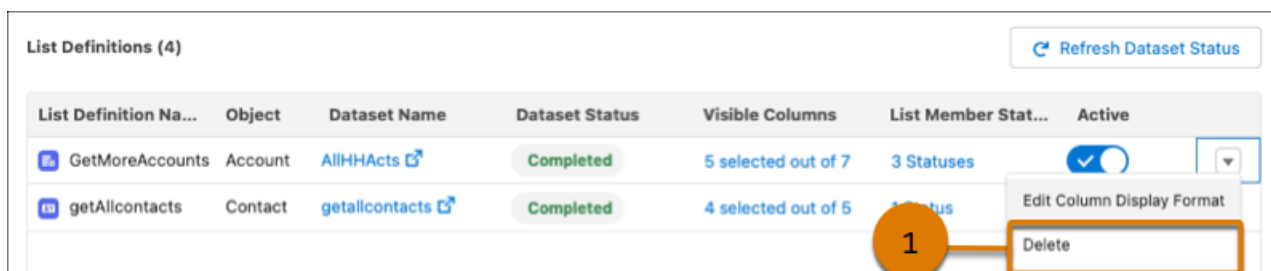
You can now delete actionable list definitions that you don't use, including draft definitions. The ability to clean up these unused definitions or drafts helps you navigate through relevant data more easily.

**Where:** This change applies to Lightning Experience in clouds that have Industry Sales Excellence Add On and Query for Datapipelines User licenses.

**Who:** To use this feature, users need the Actionable Segmentation permission set and the Query for Datapipelines User permission set.

**How:** From Setup, in the Quick Find box, enter *Actionable Segmentation*, and then select **Actionable Segmentation Settings**. Click the action menu of the list definition to delete, and select **Delete** (1).

 **Note:** Before you delete a list definition, ensure that there are no lists related to the list definition.



SEE ALSO:

[Delete Actionable List Definitions](#)(can be outdated or unavailable during release preview)

## Track API Call Usage and License Validity for Queries for DataPipelines

To ensure a smooth actionable list creation experience, monitor the Queries for DataPipelines API call usage and Query for Datapipelines User license validity on the Actionable Segmentation Settings page. The Queries for DataPipelines service enables actionable list creators to retrieve records from datasets through API calls. Query for Datapipelines User has a monthly limit of 2,500 API calls. Track the API call usage statistics and upgrade the license if you require more API calls.

**Where:** This change applies to Lightning Experience in clouds that have Industry Sales Excellence Add On and Query for Datapipelines User licenses.

**Who:** To use this feature, users need the Actionable Segmentation permission set and the Query for Datapipelines User permission set.

**How:** From Setup, in the Quick Find box, enter *Actionable Segmentation*, and then select **Actionable Segmentation Settings**. Click **API Usage of Queries for DataPipelines**.

SEE ALSO:

[Track API Call Usage and License Validity for Queries for DataPipelines](#) (can be outdated or unavailable during release preview)

## New and Changed Objects

Access more data with these new and changed objects.

### View the actionable list status

Use the new `ListStatus` field on the `ActionableList` object.

### View the default list member status

Use the new `DefaultMemberStatus` field on the `ActionableList` object.

**View the list member count**

Use the new `MemberCount` field on the `ActionableList` object.

SEE ALSO:

[ActionableList](#) (can be outdated or unavailable during release preview)

**Metadata API**

Access more metadata through these changed metadata types.

**Streamline edgemark dataset associated with actionable lists**

Use the new `edgeMart` field on the `ActionableListDefinition` metadata type.

**Determine the source type for an actionable list**

Use the new `sourceType` field on the `ActionableListDefinition` metadata type.

**Set a display order for dataset columns in actionable lists**

Use the new `DisplayOrder` field on the `ActionableListDatasetColumn` subtype of the `ActionableListDefinition` metadata type.

**Format dataset columns in actionable lists**

Use the new `DataType` field on the `ActionableListDatasetColumn` subtype of the `ActionableListDefinition` metadata type.

**Group dataset columns based on actionable list definition**

Use the new `isGroupedByListDefObj` field on the `ActionableListDatasetColumn` subtype of the `ActionableListDefinition` metadata type.

**Set up user preferences for dataset columns in actionable lists**

Use the new `ActionableListDatasetColumnUser` subtype on the `ActionableListDefinition` metadata type.

SEE ALSO:

[ActionableListDatasetColumn](#) (can be outdated or unavailable during release preview)

[ActionableListDefinition](#)

**AI Accelerator and Scoring Framework**

Get real-time predictions for use cases across multiple Industries clouds by using AI Accelerator. Build generic propensity models without writing code by using Scoring Framework. Use AI Accelerator to configure and deploy Einstein Discovery models, and show predictions and Einstein Next Best Action recommendations on record pages by using the AI Accelerator—Einstein Predictions & Recommendations component.

IN THIS SECTION:

[AI Accelerator](#)

Get AI Accelerator with multiple Industries clouds.

[Scoring Framework \(Generally Available\)](#)

Use Scoring Framework, a CRM Analytics-based framework, to easily and quickly build and deploy propensity models for multiple Industries clouds use cases using clicks instead of code. Define template configurations for your scoring use cases to create CRM Analytics apps, Einstein Discovery models, and recipes.

## AI Accelerator

Get AI Accelerator with multiple Industries clouds.

### IN THIS SECTION:

#### [Get AI Accelerator with Multiple Industries Clouds](#)

Build and deploy machine learning use cases faster than before. Customize the configuration of your use cases by defining the machine learning models and corresponding feature extractors to make your use cases real time. Integrate AI Accelerator and Next Best Actions (NBA) for your cases and show real-time predictions and NBA recommendations on one component. Use AI Accelerator Connect API to generate predictions in real time and Recommendations Connect API to get recommendations from the predictions generated for your use case.

#### [Changed AI Accelerator Metadata Types](#)

Learn more about the changed metadata types in AI Accelerator.

## Get AI Accelerator with Multiple Industries Clouds

Build and deploy machine learning use cases faster than before. Customize the configuration of your use cases by defining the machine learning models and corresponding feature extractors to make your use cases real time. Integrate AI Accelerator and Next Best Actions (NBA) for your cases and show real-time predictions and NBA recommendations on one component. Use AI Accelerator Connect API to generate predictions in real time and Recommendations Connect API to get recommendations from the predictions generated for your use case.

**Where:** This change applies to Lightning Experience of multiple Industries clouds.

**Who:** AI Accelerator is available to these users:

- Automotive Cloud users with the Revenue Intelligence for Automotive license.
- Communications Cloud users with the Revenue Intelligence for Communications Intelligence license.
- Consumer Goods Cloud users with the Revenue Intelligence for Consumer Goods license.
- Education Cloud users with the CRM Analytics for Education license.
- Energy and Utilities Cloud users with the Revenue Intelligence for Energy and Utilities license.
- Financial Services Cloud users with the Revenue Intelligence for Financial Services license.
- Health Cloud users with the Revenue Intelligence for Health license.
- Manufacturing Cloud users with the Revenue Intelligence for Manufacturing license.
- Media Cloud users with the Revenue Intelligence for Media license.

### SEE ALSO:

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

## Changed AI Accelerator Metadata Types

Learn more about the changed metadata types in AI Accelerator.

### Determine the type of user who created the use case definition

Use the `creatorType` field on the `AIUseCaseDefinition` metadata type. Introduced in API version 57.0, this field is added to the AI Accelerator and Scoring Framework Developer Guide.



**Determine the tool or platform that generates recommendations**

Use the `recommendationSource` field on the `AIUsecaseDefinition` metadata type. Introduced in API version 57.0, this field is added to the AI Accelerator and Scoring Framework Developer Guide.

**Determine the platform on which the machine learning model is created and deployed**

Use the `predictionPlatform` field on the `AIUsecaseModel` metadata type. Introduced in API version 57.0, this field is added to the AI Accelerator and Scoring Framework Developer Guide.

**Get the identifier of the input source of the features that's used by a model to generate predictions**

Use the `batchInputSourceIdentifier` field on the `AIFeatureExtractor` metadata type. Introduced in API version 57.0, this field is added to the AI Accelerator and Scoring Framework Developer Guide.

**Determine the type of feature input that's used in generating predictions**

Use the `featureInputType` field on the `AIFeatureExtractor` metadata type. Introduced in API version 57.0, this field is added to the AI Accelerator and Scoring Framework Developer Guide.

**Get the JSON file with features that act as context for the feature extractor**

Use the `inputContext` field on the `AIFeatureExtractor` metadata type. Introduced in API version 57.0, this field is added to the AI Accelerator and Scoring Framework Developer Guide.

## Scoring Framework (Generally Available)

Use Scoring Framework, a CRM Analytics-based framework, to easily and quickly build and deploy propensity models for multiple Industries clouds use cases using clicks instead of code. Define template configurations for your scoring use cases to create CRM Analytics apps, Einstein Discovery models, and recipes.

### IN THIS SECTION:

[Validate Input Features and Prediction Accuracy Before Deploying Your Model](#)

Validate the input features and prediction accuracy of your model by only training the model. Then train and deploy the model based on the predictions.

[Get Predictions Based on a Standard or Custom Object](#)

Make your business processes smarter and more predictive by building predictive models based on a standard or custom object. The object must contain the data to train your model and get predictions for. For example, to get predictions about accounts, select the Account object.

[Make Informed Business Decisions Based on Historical Trends](#)

Generate predictions for specific periods, make informed business decisions, and maximize revenue based on historical trends. For example, to get predictions about accounts that sales representatives can focus on for the next 30 days to maximize revenue, select 30 as the prediction duration. Then select the CRM Analytics datasets that contain historical data to use to determine the trend of revenue generated from accounts in the past 30 days.

[Analyze Your Data Better by Using Additional Input Features](#)

Analyze your data better by including features that are in a CRM Analytics dataset along with the object data. For example, get predictions on external data that's connected and synced to CRM Analytics or on fields that are precomputed and stored in a dataset.

[Get Accurate Predictions by Defining the Target Variable](#)

Define the variable to use as your model's primary focus for analysis and predictions. Scoring models uncover relationships between features and the target variable, and provide insights about maximizing or minimizing the target variable. For example, to get predictions about the likelihood of opportunities converting into accounts, define a target variable that indicates opportunities' conversion into accounts. If your target variable is opportunities that have related accounts, then add conditions that define this target variable. You can also apply custom logic to your conditions to be more precise about the target variable.

### [Improve the Accuracy of Your Predictions by Customizing Input Features](#)

Features are field values that influence predictions. Get more valuable and accurate predictions for your use case by selecting the appropriate features to base your predictions on. You can select fields from the CRM Analytics dataset that contains additional features, a precomputed set of fields, or from the object that you selected for training and scoring.

### [Get Predictions Focused on a Subset of Data](#)

Focus training your model and predictions on a specific subset of the object data by defining filter conditions. Get more useful predictions by excluding records irrelevant to your prediction. For example, define conditions to filter account data for a geographic region and get predictions for accounts specific to that region. You can also apply custom logic to your filter conditions to filter data more precisely. For example, you want predictions on contacts who are homeowners, have dependents, and are married. Rather than using all conditions or any conditions, use custom logic to look at all homeowners who either have dependents or are married.

### [Show Predictions Contextually by Storing Them in Records](#)

View the generated predictions within the context of your use case by storing them in records and make informed decisions based on them. Store the predictions for your use case in records by selecting a preconfigured output connector to write the predictions and an object and field to store the predictions.

### [Get Predictions in Real Time by Integrating Scoring Framework with AI Accelerator](#)

Get real-time predictions, suggestions and insights about prediction scores, and Next Best Action recommendations for your scoring use cases by creating an AI Accelerator use case. Customize the configuration of the AI Accelerator use case by defining an Einstein Discovery model and the corresponding feature extractor. Get the flexibility to save not just the predictions but also the computed features, and insights and suggestions about the prediction scores.

### [Ensure Data Requirements Are Met While Configuring Templates](#)

Confirm that you have sufficient records in your dataset while setting up your template configuration by counting records, and save time and rework. Einstein can determine the number of training records and scoring records, and yes and no values that are necessary to generate predictions. If you have insufficient records in your filtered dataset, edit your conditions and then recount your filtered records.

### [Get to the CRM Analytics App or the AI Accelerator Use Case with One Click](#)

You can open the CRM Analytics app or the AI Accelerator use case for a template configuration quickly by clicking the relevant button on the template configuration's card.

### [Retry to Activate or Deactivate a Template Configuration](#)

If your template configuration activation or deactivation is unsuccessful, you can retry the activation or deactivation. You can also retry your AI accelerator use case's creation or deletion if it's unsuccessful.

### [New Scoring Framework Metadata Types](#)

Make the most of the new metadata types in Scoring Framework.

### [New Scoring Framework Tooling API Objects](#)

Use Tooling API to work with the Scoring Framework setup objects.

## Validate Input Features and Prediction Accuracy Before Deploying Your Model

Validate the input features and prediction accuracy of your model by only training the model. Then train and deploy the model based on the predictions.

**Where:** This change applies to Lightning Experience of multiple Industries clouds.

**Who:** Scoring Framework is available to these users:

- Automotive Cloud users with the Revenue Intelligence for Automotive license.
- Communications Cloud users with the Revenue Intelligence for Communications Intelligence license.
- Consumer Goods Cloud users with the Revenue Intelligence for Consumer Goods license.

- Education Cloud users with the CRM Analytics for Education license.
- Energy and Utilities Cloud users with the Revenue Intelligence for Energy and Utilities license.
- Financial Services Cloud users with the Revenue Intelligence for Financial Services license.
- Health Cloud users with the Revenue Intelligence for Health license.
- Manufacturing Cloud users with the Revenue Intelligence for Manufacturing license.
- Media Cloud users with the Revenue Intelligence for Media license.

**How:** To only train the model that's used to get predictions for your use case or to train and deploy the model, go to the Setup page of Scoring Framework. Create a CRM Analytics template configuration and select the model mode.

**Scoring Framework**  
Define template configurations to build customizable CRM Analytics apps that generate predictions for your scoring use cases. For each template configuration, specify the building blocks of your model, including the object and the fields that determine your model's features and target variable. You can also select a CRM Analytics dataset with additional features to train and score your model, and define conditions to filter your training and scoring datasets.

**New Template Configuration**  
Select the template configuration type, enter a template configuration label, select the model mode, and optionally, enter a description.

Template Configuration Type  
Prediction Scores (Financial Services Cloud)

Template Configuration Label  
Likelihood of Purchasing Products

Template Configuration API Name  
Likelihood\_of\_Purchasing\_Products

Model Mode  
☐ Train
 ☒ Train and deploy

Description  
Install a CRM Analytics app that generates predictions about accounts' likelihood of purchasing products.

Back Save & Continue

SEE ALSO:

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

## Get Predictions Based on a Standard or Custom Object

Make your business processes smarter and more predictive by building predictive models based on a standard or custom object. The object must contain the data to train your model and get predictions for. For example, to get predictions about accounts, select the Account object.

**Where:** This change applies to Lightning Experience of multiple Industries clouds.

**Who:** Scoring Framework is available to these users:

- Automotive Cloud users with the Revenue Intelligence for Automotive license.
- Communications Cloud users with the Revenue Intelligence for Communications Intelligence license.
- Consumer Goods Cloud users with the Revenue Intelligence for Consumer Goods license.
- Education Cloud users with the CRM Analytics for Education license.
- Energy and Utilities Cloud users with the Revenue Intelligence for Energy and Utilities license.
- Financial Services Cloud users with the Revenue Intelligence for Financial Services license.

- Health Cloud users with the Revenue Intelligence for Health license.
- Manufacturing Cloud users with the Revenue Intelligence for Manufacturing license.
- Media Cloud users with the Revenue Intelligence for Media license.

**How:** To select an object to base predictions on, go to the Setup page of Scoring Framework and open a CRM Analytics template configuration. Click **Set Up** for the Select an Object for Training and Scoring step and select the object that contains data to train your model and to predict values for.

SEE ALSO:

[Salesforce Help: Select an Object for Training and Scoring \(can be outdated or unavailable during release preview\)](#)

## Make Informed Business Decisions Based on Historical Trends

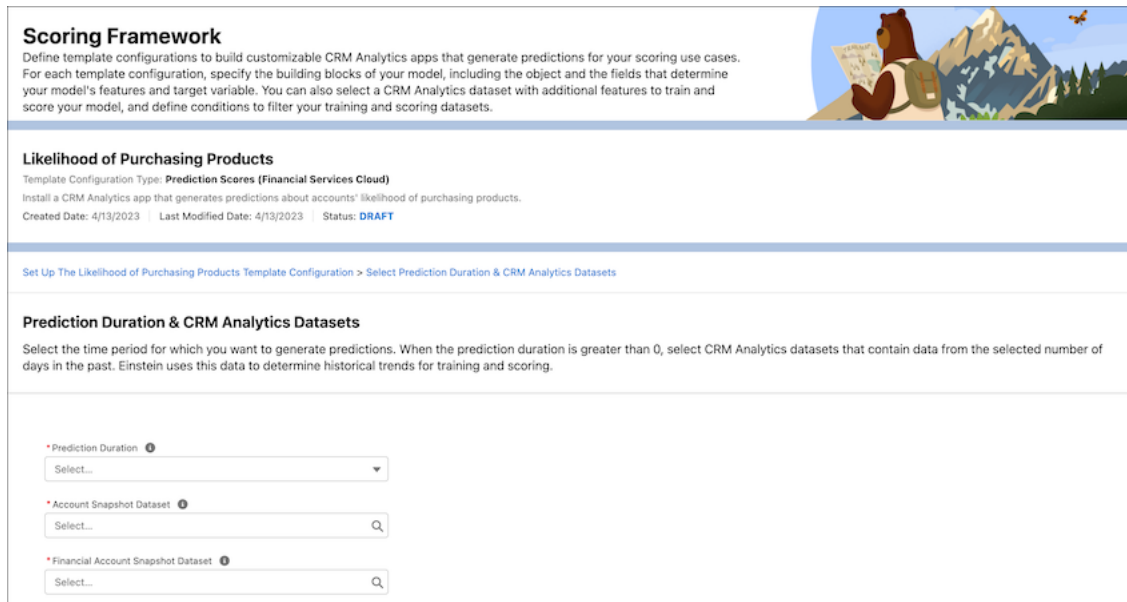
Generate predictions for specific periods, make informed business decisions, and maximize revenue based on historical trends. For example, to get predictions about accounts that sales representatives can focus on for the next 30 days to maximize revenue, select 30 as the prediction duration. Then select the CRM Analytics datasets that contain historical data to use to determine the trend of revenue generated from accounts in the past 30 days.

**Where:** This change applies to Lightning Experience of multiple Industries clouds.

**Who:** Scoring Framework is available to these users:

- Automotive Cloud users with the Revenue Intelligence for Automotive license.
- Communications Cloud users with the Revenue Intelligence for Communications Intelligence license.
- Consumer Goods Cloud users with the Revenue Intelligence for Consumer Goods license.
- Education Cloud users with the CRM Analytics for Education license.
- Energy and Utilities Cloud users with the Revenue Intelligence for Energy and Utilities license.
- Financial Services Cloud users with the Revenue Intelligence for Financial Services license.
- Health Cloud users with the Revenue Intelligence for Health license.
- Manufacturing Cloud users with the Revenue Intelligence for Manufacturing license.
- Media Cloud users with the Revenue Intelligence for Media license.

**How:** To select the period and historical datasets for your predictions, go to the Setup page of Scoring Framework and open a CRM Analytics template configuration. Click **Set Up** for the Select Prediction Duration & CRM Analytics Datasets step, and then select the period and the CRM Analytics datasets.



**Scoring Framework**

Define template configurations to build customizable CRM Analytics apps that generate predictions for your scoring use cases. For each template configuration, specify the building blocks of your model, including the object and the fields that determine your model's features and target variable. You can also select a CRM Analytics dataset with additional features to train and score your model, and define conditions to filter your training and scoring datasets.

**Likelihood of Purchasing Products**

Template Configuration Type: **Prediction Scores (Financial Services Cloud)**

Install a CRM Analytics app that generates predictions about accounts' likelihood of purchasing products.

Created Date: 4/13/2023 | Last Modified Date: 4/13/2023 | Status: **DRAFT**

Set Up The Likelihood of Purchasing Products Template Configuration > Select Prediction Duration & CRM Analytics Datasets

**Prediction Duration & CRM Analytics Datasets**

Select the time period for which you want to generate predictions. When the prediction duration is greater than 0, select CRM Analytics datasets that contain data from the selected number of days in the past. Einstein uses this data to determine historical trends for training and scoring.

\* Prediction Duration ⓘ  
Select...

\* Account Snapshot Dataset ⓘ  
Select...

\* Financial Account Snapshot Dataset ⓘ  
Select...

SEE ALSO:

[Salesforce Help: Select a Prediction Duration and Historical Datasets \(can be outdated or unavailable during release preview\)](#)

## Analyze Your Data Better by Using Additional Input Features

Analyze your data better by including features that are in a CRM Analytics dataset along with the object data. For example, get predictions on external data that's connected and synced to CRM Analytics or on fields that are precomputed and stored in a dataset.

**Where:** This change applies to Lightning Experience of multiple Industries clouds.

**Who:** Scoring Framework is available to these users:

- Automotive Cloud users with the Revenue Intelligence for Automotive license.
- Communications Cloud users with the Revenue Intelligence for Communications Intelligence license.
- Consumer Goods Cloud users with the Revenue Intelligence for Consumer Goods license.
- Education Cloud users with the CRM Analytics for Education license.
- Energy and Utilities Cloud users with the Revenue Intelligence for Energy and Utilities license.
- Financial Services Cloud users with the Revenue Intelligence for Financial Services license.
- Health Cloud users with the Revenue Intelligence for Health license.
- Manufacturing Cloud users with the Revenue Intelligence for Manufacturing license.
- Media Cloud users with the Revenue Intelligence for Media license.

**How:** To select a CRM Analytics dataset, go to the Setup page of Scoring Framework and open a CRM Analytics template configuration. Click **Set Up** for the Do You Want to Include a CRM Analytics Dataset with Additional Features? step.

**Scoring Framework**  
Define template configurations to build customizable CRM Analytics apps that generate predictions for your scoring use cases. For each template configuration, specify the building blocks of your model, including the object and the fields that determine your model's features and target variable. You can also select a CRM Analytics dataset with additional features to train and score your model, and define conditions to filter your training and scoring datasets.

**Likelihood of Purchasing Products**  
Template Configuration Type: **Prediction Scores (Financial Services Cloud)**  
Install a CRM Analytics app that generates predictions about the accounts' likelihood of purchasing products.  
Created Date: 4/7/2023 | Last Modified Date: 4/7/2023 | Status: **DRAFT**

Set Up The Likelihood of Purchasing Products Template Configuration > Do You Want to Include a CRM Analytics Dataset with Additional Features?

**CRM Analytics Dataset with Additional Features**  
Select a CRM Analytics dataset with additional features and then select join keys from this dataset and the object selected for training and scoring. The dataset is also used for training and scoring.

1. CRM Analytics Dataset: Salesforce\_Account

2. Dataset Join Key: Name

3. Account Join Key: Account Name

Back Save & Exit Save & Continue

Select the CRM Analytics Dataset that contains additional features (1). Then select join keys from the dataset (2) and the object selected for training and scoring (3).

SEE ALSO:

[Salesforce Help: Add a Dataset to Fine-Tune Your Predictions \(can be outdated or unavailable during release preview\)](#)

## Get Accurate Predictions by Defining the Target Variable

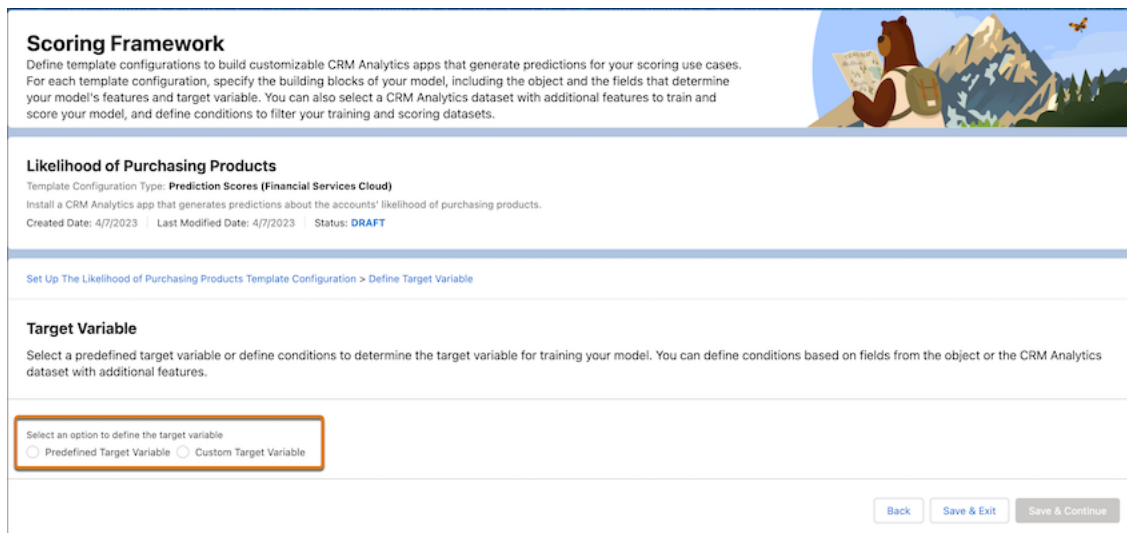
Define the variable to use as your model's primary focus for analysis and predictions. Scoring models uncover relationships between features and the target variable, and provide insights about maximizing or minimizing the target variable. For example, to get predictions about the likelihood of opportunities converting into accounts, define a target variable that indicates opportunities' conversion into accounts. If your target variable is opportunities that have related accounts, then add conditions that define this target variable. You can also apply custom logic to your conditions to be more precise about the target variable.

**Where:** This change applies to Lightning Experience of multiple Industries clouds.

**Who:** Scoring Framework is available to these users:

- Automotive Cloud users with the Revenue Intelligence for Automotive license.
- Communications Cloud users with the Revenue Intelligence for Communications Intelligence license.
- Consumer Goods Cloud users with the Revenue Intelligence for Consumer Goods license.
- Education Cloud users with the CRM Analytics for Education license.
- Energy and Utilities Cloud users with the Revenue Intelligence for Energy and Utilities license.
- Financial Services Cloud users with the Revenue Intelligence for Financial Services license.
- Health Cloud users with the Revenue Intelligence for Health license.
- Manufacturing Cloud users with the Revenue Intelligence for Manufacturing license.
- Media Cloud users with the Revenue Intelligence for Media license.

**How:** To define the target variable, go to the Setup page of Scoring Framework and open a CRM Analytics template configuration. Click **Set Up** for the Define Target Variable step. Select a predefined target variable for your use case, or define a custom variable by adding filter conditions.



**Scoring Framework**  
Define template configurations to build customizable CRM Analytics apps that generate predictions for your scoring use cases. For each template configuration, specify the building blocks of your model, including the object and the fields that determine your model's features and target variable. You can also select a CRM Analytics dataset with additional features to train and score your model, and define conditions to filter your training and scoring datasets.

**Likelihood of Purchasing Products**  
Template Configuration Type: **Prediction Scores (Financial Services Cloud)**  
Install a CRM Analytics app that generates predictions about the accounts' likelihood of purchasing products.  
Created Date: 4/7/2023 | Last Modified Date: 4/7/2023 | Status: **DRAFT**

Set Up The Likelihood of Purchasing Products Template Configuration > Define Target Variable

**Target Variable**  
Select a predefined target variable or define conditions to determine the target variable for training your model. You can define conditions based on fields from the object or the CRM Analytics dataset with additional features.

Select an option to define the target variable  
☐ Predefined Target Variable ☐ Custom Target Variable

[Back](#) [Save & Exit](#) [Save & Continue](#)

SEE ALSO:

[Salesforce Help: Define the Target for the Prediction \(can be outdated or unavailable during release preview\)](#)

## Improve the Accuracy of Your Predictions by Customizing Input Features

Features are field values that influence predictions. Get more valuable and accurate predictions for your use case by selecting the appropriate features to base your predictions on. You can select fields from the CRM Analytics dataset that contains additional features, a precomputed set of fields, or from the object that you selected for training and scoring.

**Where:** This change applies to Lightning Experience of multiple Industries clouds.

**Who:** Scoring Framework is available to these users:

- Automotive Cloud users with the Revenue Intelligence for Automotive license.
- Communications Cloud users with the Revenue Intelligence for Communications Intelligence license.
- Consumer Goods Cloud users with the Revenue Intelligence for Consumer Goods license.
- Education Cloud users with the CRM Analytics for Education license.
- Energy and Utilities Cloud users with the Revenue Intelligence for Energy and Utilities license.
- Financial Services Cloud users with the Revenue Intelligence for Financial Services license.
- Health Cloud users with the Revenue Intelligence for Health license.
- Manufacturing Cloud users with the Revenue Intelligence for Manufacturing license.
- Media Cloud users with the Revenue Intelligence for Media license.

**How:** To select features, go to the Setup page of Scoring Framework and open a CRM Analytics template configuration. Click **Set Up** for the Features step and select the features to use as inputs for your model.

## Scoring Framework

Define template configurations to build customizable CRM Analytics apps that generate predictions for your scoring use cases. For each template configuration, specify the building blocks of your model, including the object and the fields that determine your model's features and target variable. You can also select a CRM Analytics dataset with additional features to train and score your model, and define conditions to filter your training and scoring datasets.

### Likelihood of Purchasing Products

Template Configuration Type: **Prediction Scores (Financial Services Cloud)**

Install a CRM Analytics app that generates predictions about the accounts' likelihood of purchasing products.

Created Date: 4/7/2023 | Last Modified Date: 4/7/2023 | Status: **DRAFT**

[Set Up The Likelihood of Purchasing Products Template Configuration > Select Features](#)

### Features

Select features that act as inputs for your scoring model. Your features can be object fields, CRM Analytics predefined features, or fields from the CRM Analytics dataset with additional features. Your model uses these features for training and scoring.

11 Features Selected

**CRM Analytics Predefined Fields** | Account Fields

Field Label - 11 of 59 Fields Selected	Data Type
<input checked="" type="checkbox"/> Account Record Type	STRING
<input checked="" type="checkbox"/> Model Snapshot Date	Date
<input checked="" type="checkbox"/> Snapshot Date	Date
<input checked="" type="checkbox"/> Average Performance 1Yr	INT
<input checked="" type="checkbox"/> Average Performance 3Yr	INT
<input checked="" type="checkbox"/> Average Performance QTD	INT
<input checked="" type="checkbox"/> Average Performance MTD	INT
<input checked="" type="checkbox"/> Average Performance YTD	INT

SEE ALSO:

[Salesforce Help: Select Input Features to Get Accurate Predictions \(can be outdated or unavailable during release preview\)](#)

## Get Predictions Focused on a Subset of Data

Focus training your model and predictions on a specific subset of the object data by defining filter conditions. Get more useful predictions by excluding records irrelevant to your prediction. For example, define conditions to filter account data for a geographic region and get predictions for accounts specific to that region. You can also apply custom logic to your filter conditions to filter data more precisely. For example, you want predictions on contacts who are homeowners, have dependents, and are married. Rather than using all conditions or any conditions, use custom logic to look at all homeowners who either have dependents or are married.

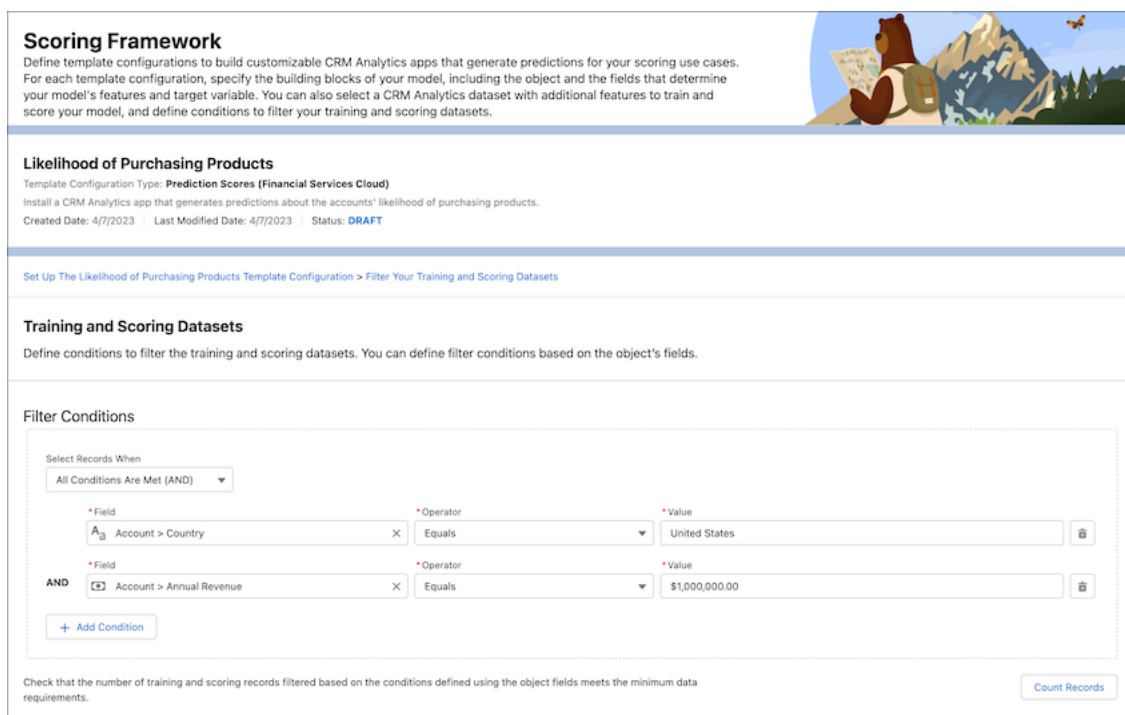
**Where:** This change applies to Lightning Experience of multiple Industries clouds.

**Who:** Scoring Framework is available to these users:

- Automotive Cloud users with the Revenue Intelligence for Automotive license.
- Communications Cloud users with the Revenue Intelligence for Communications Intelligence license.
- Consumer Goods Cloud users with the Revenue Intelligence for Consumer Goods license.
- Education Cloud users with the CRM Analytics for Education license.
- Energy and Utilities Cloud users with the Revenue Intelligence for Energy and Utilities license.
- Financial Services Cloud users with the Revenue Intelligence for Financial Services license.
- Health Cloud users with the Revenue Intelligence for Health license.
- Manufacturing Cloud users with the Revenue Intelligence for Manufacturing license.
- Media Cloud users with the Revenue Intelligence for Media license.



**How:** To define conditions for filtering your training and scoring datasets, go to the Setup page of Scoring Framework. Open a CRM Analytics template configuration. Click **Set Up** for the Filter Your Training and Scoring Datasets step and define conditions to filter your training and scoring datasets.



**Scoring Framework**  
Define template configurations to build customizable CRM Analytics apps that generate predictions for your scoring use cases. For each template configuration, specify the building blocks of your model, including the object and the fields that determine your model's features and target variable. You can also select a CRM Analytics dataset with additional features to train and score your model, and define conditions to filter your training and scoring datasets.

**Likelihood of Purchasing Products**  
Template Configuration Type: **Prediction Scores (Financial Services Cloud)**  
Install a CRM Analytics app that generates predictions about the accounts' likelihood of purchasing products.  
Created Date: 4/7/2023 | Last Modified Date: 4/7/2023 | Status: **DRAFT**

Set Up The Likelihood of Purchasing Products Template Configuration > Filter Your Training and Scoring Datasets

**Training and Scoring Datasets**  
Define conditions to filter the training and scoring datasets. You can define filter conditions based on the object's fields.

**Filter Conditions**

Select Records When  
All Conditions Are Met (AND)

*Field	*Operator	*Value
Account > Country	Equals	United States
<b>AND</b>		
Account > Annual Revenue	Equals	\$1,000,000.00

+ Add Condition

Check that the number of training and scoring records filtered based on the conditions defined using the object fields meets the minimum data requirements.

Count Records

SEE ALSO:

[Salesforce Help: Filter Your Training and Scoring Datasets \(can be outdated or unavailable during release preview\)](#)

## Show Predictions Contextually by Storing Them in Records

View the generated predictions within the context of your use case by storing them in records and make informed decisions based on them. Store the predictions for your use case in records by selecting a preconfigured output connector to write the predictions and an object and field to store the predictions.

**Where:** This change applies to Lightning Experience of multiple Industries clouds.

**Who:** Scoring Framework is available to these users:

- Automotive Cloud users with the Revenue Intelligence for Automotive license.
- Communications Cloud users with the Revenue Intelligence for Communications Intelligence license.
- Consumer Goods Cloud users with the Revenue Intelligence for Consumer Goods license.
- Education Cloud users with the CRM Analytics for Education license.
- Energy and Utilities Cloud users with the Revenue Intelligence for Energy and Utilities license.
- Financial Services Cloud users with the Revenue Intelligence for Financial Services license.
- Health Cloud users with the Revenue Intelligence for Health license.
- Manufacturing Cloud users with the Revenue Intelligence for Manufacturing license.
- Media Cloud users with the Revenue Intelligence for Media license.

**How:** To select the output connection, object, and field, go to the Setup page of Scoring Framework and open a CRM Analytics template configuration. Click **Set Up** for the Configure Write Back of Predictions step.

Select the output connection (1) and the object (2) and field (3) that you want to store the predictions in.

SEE ALSO:

[Salesforce Help: Store Predictions in Records \(can be outdated or unavailable during release preview\)](#)

## Get Predictions in Real Time by Integrating Scoring Framework with AI Accelerator

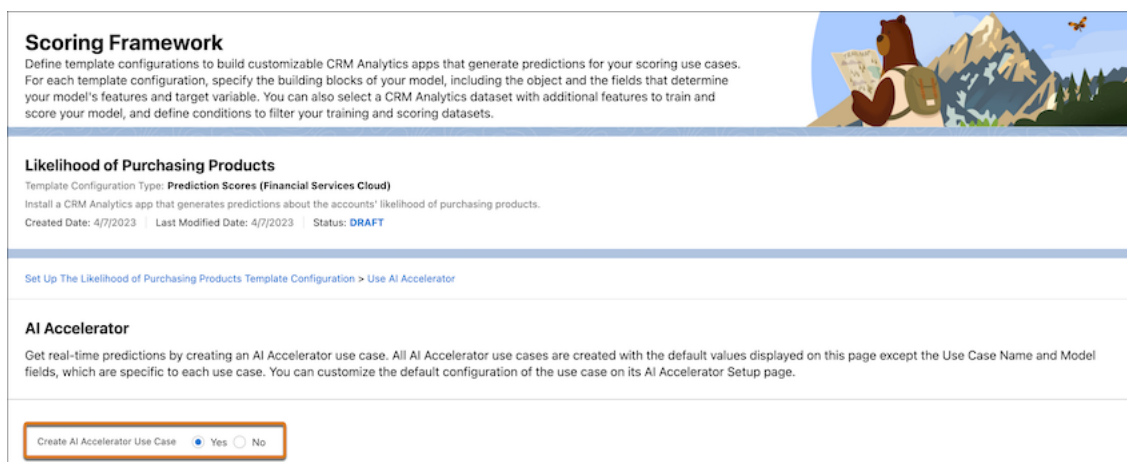
Get real-time predictions, suggestions and insights about prediction scores, and Next Best Action recommendations for your scoring use cases by creating an AI Accelerator use case. Customize the configuration of the AI Accelerator use case by defining an Einstein Discovery model and the corresponding feature extractor. Get the flexibility to save not just the predictions but also the computed features, and insights and suggestions about the prediction scores.

**Where:** This change applies to Lightning Experience of multiple Industries clouds.

**Who:** Scoring Framework is available to these users:

- Automotive Cloud users with the Revenue Intelligence for Automotive license.
- Communications Cloud users with the Revenue Intelligence for Communications Intelligence license.
- Consumer Goods Cloud users with the Revenue Intelligence for Consumer Goods license.
- Education Cloud users with the CRM Analytics for Education license.
- Energy and Utilities Cloud users with the Revenue Intelligence for Energy and Utilities license.
- Financial Services Cloud users with the Revenue Intelligence for Financial Services license.
- Health Cloud users with the Revenue Intelligence for Health license.
- Manufacturing Cloud users with the Revenue Intelligence for Manufacturing license.
- Media Cloud users with the Revenue Intelligence for Media license.

**How:** To create an AI Accelerator use case, go to the Setup page of Scoring Framework and open a CRM Analytics template configuration. Click **Set Up** for the Use AI Accelerator step and select **Yes** to create an AI Accelerator use case. Customize the default configuration of the use case on the AI Accelerator Setup page for the use case.



**Scoring Framework**  
Define template configurations to build customizable CRM Analytics apps that generate predictions for your scoring use cases. For each template configuration, specify the building blocks of your model, including the object and the fields that determine your model's features and target variable. You can also select a CRM Analytics dataset with additional features to train and score your model, and define conditions to filter your training and scoring datasets.

**Likelihood of Purchasing Products**  
Template Configuration Type: **Prediction Scores (Financial Services Cloud)**  
Install a CRM Analytics app that generates predictions about the accounts' likelihood of purchasing products.  
Created Date: 4/7/2023 | Last Modified Date: 4/7/2023 | Status: **DRAFT**

Set Up The Likelihood of Purchasing Products Template Configuration > Use AI Accelerator

**AI Accelerator**  
Get real-time predictions by creating an AI Accelerator use case. All AI Accelerator use cases are created with the default values displayed on this page except the Use Case Name and Model fields, which are specific to each use case. You can customize the default configuration of the use case on its AI Accelerator Setup page.

Create AI Accelerator Use Case ☒ Yes ☐ No

SEE ALSO:

[Salesforce Help: Show Real-Time Predictions and Next Best Action Recommendations by Using AI Accelerator \(can be outdated or unavailable during release preview\)](#)

## Ensure Data Requirements Are Met While Configuring Templates

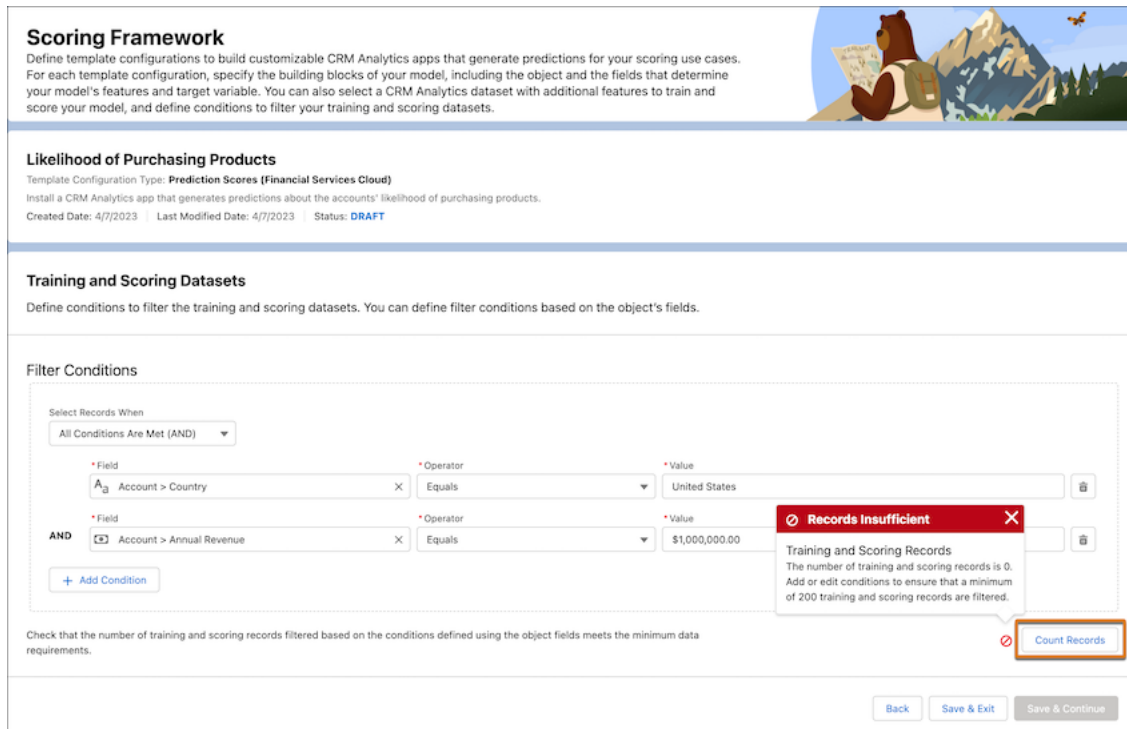
Confirm that you have sufficient records in your dataset while setting up your template configuration by counting records, and save time and rework. Einstein can determine the number of training records and scoring records, and yes and no values that are necessary to generate predictions. If you have insufficient records in your filtered dataset, edit your conditions and then recount your filtered records.

**Where:** This change applies to Lightning Experience of multiple Industries clouds.

**Who:** Scoring Framework is available to these users:

- Automotive Cloud users with the Revenue Intelligence for Automotive license.
- Communications Cloud users with the Revenue Intelligence for Communications Intelligence license.
- Consumer Goods Cloud users with the Revenue Intelligence for Consumer Goods license.
- Education Cloud users with the CRM Analytics for Education license.
- Energy and Utilities Cloud users with the Revenue Intelligence for Energy and Utilities license.
- Financial Services Cloud users with the Revenue Intelligence for Financial Services license.
- Health Cloud users with the Revenue Intelligence for Health license.
- Manufacturing Cloud users with the Revenue Intelligence for Manufacturing license.
- Media Cloud users with the Revenue Intelligence for Media license.

**How:** To count records, after you define the conditions for a custom target variable or to filter training and scoring datasets, click **Count Records**. If you don't have enough records, edit your filter conditions.



**Scoring Framework**  
Define template configurations to build customizable CRM Analytics apps that generate predictions for your scoring use cases. For each template configuration, specify the building blocks of your model, including the object and the fields that determine your model's features and target variable. You can also select a CRM Analytics dataset with additional features to train and score your model, and define conditions to filter your training and scoring datasets.

**Likelihood of Purchasing Products**  
Template Configuration Type: **Prediction Scores (Financial Services Cloud)**  
Install a CRM Analytics app that generates predictions about the accounts' likelihood of purchasing products.  
Created Date: 4/7/2023 | Last Modified Date: 4/7/2023 | Status: **DRAFT**

**Training and Scoring Datasets**  
Define conditions to filter the training and scoring datasets. You can define filter conditions based on the object's fields.

**Filter Conditions**

Select Records When  
All Conditions Are Met (AND)

* Field	* Operator	* Value
Account > Country	Equals	United States
AND Account > Annual Revenue	Equals	\$1,000,000.00

+ Add Condition

Check that the number of training and scoring records filtered based on the conditions defined using the object fields meets the minimum data requirements.

**Records Insufficient**  
Training and Scoring Records  
The number of training and scoring records is 0. Add or edit conditions to ensure that a minimum of 200 training and scoring records are filtered.

Count Records

Back Save & Exit Save & Continue

SEE ALSO:

[Salesforce Help: Define the Target for the Prediction \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Filter Your Training and Scoring Datasets \(can be outdated or unavailable during release preview\)](#)

## Get to the CRM Analytics App or the AI Accelerator Use Case with One Click

You can open the CRM Analytics app or the AI Accelerator use case for a template configuration quickly by clicking the relevant button on the template configuration's card.

**Where:** This change applies to Lightning Experience of multiple Industries clouds.

**Who:** Scoring Framework is available to these users:

- Automotive Cloud users with the Revenue Intelligence for Automotive license.
- Communications Cloud users with the Revenue Intelligence for Communications Intelligence license.
- Consumer Goods Cloud users with the Revenue Intelligence for Consumer Goods license.
- Education Cloud users with the CRM Analytics for Education license.
- Energy and Utilities Cloud users with the Revenue Intelligence for Energy and Utilities license.
- Financial Services Cloud users with the Revenue Intelligence for Financial Services license.
- Health Cloud users with the Revenue Intelligence for Health license.
- Manufacturing Cloud users with the Revenue Intelligence for Manufacturing license.
- Media Cloud users with the Revenue Intelligence for Media license.

SEE ALSO:

[Salesforce Help: Activate a CRM Analytics Template Configuration \(can be outdated or unavailable during release preview\)](#)

## Retry to Activate or Deactivate a Template Configuration

If your template configuration activation or deactivation is unsuccessful, you can retry the activation or deactivation. You can also retry your AI accelerator use case's creation or deletion if it's unsuccessful.

**Where:** This change applies to Lightning Experience of multiple Industries clouds.

**Who:** Scoring Framework is available to these users:

- Automotive Cloud users with the Revenue Intelligence for Automotive license.
- Communications Cloud users with the Revenue Intelligence for Communications Intelligence license.
- Consumer Goods Cloud users with the Revenue Intelligence for Consumer Goods license.
- Education Cloud users with the CRM Analytics for Education license.
- Energy and Utilities Cloud users with the Revenue Intelligence for Energy and Utilities license.
- Financial Services Cloud users with the Revenue Intelligence for Financial Services license.
- Health Cloud users with the Revenue Intelligence for Health license.
- Manufacturing Cloud users with the Revenue Intelligence for Manufacturing license.
- Media Cloud users with the Revenue Intelligence for Media license.

**How:** Go to the template configuration's card on the Setup page of Scoring Framework.

- If the template configuration's activation failed, to retry installing the CRM Analytics app, click **Retry** on the card.
- If the AI Accelerator use case wasn't created after the CRM Analytics app installation, to retry creating the use case from the Setup page of AI Accelerator, click **Create AI Accelerator Use Case** on the card.
- If the template configuration's deactivation failed, to retry deleting the AI Accelerator use case and the CRM Analytics app, click **Retry** on the card.

SEE ALSO:

[Salesforce Help: Activate a CRM Analytics Template Configuration \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Deactivate a CRM Analytics Template Configuration \(can be outdated or unavailable during release preview\)](#)

## New Scoring Framework Metadata Types

Make the most of the new metadata types in Scoring Framework.

### Get the details of the machine learning model that's used for scoring

Use the new `AIscoringModelDefinition` metadata type.

## New Scoring Framework Tooling API Objects

Use Tooling API to work with the Scoring Framework setup objects.

### Get the details of the machine learning model that's used for scoring

Use the new `AIscoringModelDefinition` object.

### Get the details of the version of an AI scoring model

Use the new `AIscoringModelDefVersion` object.

### Get the steps associated with an AI scoring model version

Use the new `AIscoringStep` object.

## Audit Trail

Monitor and analyze customers' secondary identity verification audit records to detect potential cases of compliance fraud and identity breach. Access all filter options in a pop-up window. Filter audit records based on verification status and initiating attendee. View communication channel and verification type information. For audit records of secondary verification type, view primary and secondary verification details by clicking a hyperlink in the Initiating Attendee Type column. Export audit records in CSV format. Get email notification about the success or failure of the export request. Download or delete the exported file using the Audit Trail Export Dashboard.

### IN THIS SECTION:

#### [Monitor Secondary Identity Verification Audit Records to Ensure Privacy and Security of Customers](#)

You can now monitor and analyze the secondary identity verification audit records to ensure the privacy and security of customers. The records are generated when contact center agents use the identity verification flow to verify the identity of customers.

#### [Experience Better User Interface with All Your Filters in One Place](#)

A single pop-up window now displays all filter options to simplify the filtering process and save you time.

#### [Use New Filters to Improve Efficiency by Quickly Finding Information](#)

With two new filter options, verification status and initiating attendee, you can now filter audit records with more granularity and find the information you need quickly. Verification status helps you filter audit records based on success or failure of identity verification. You can further narrow down the audit records by specifying the initiating attendee of engagement interactions.

#### [Expand Your Insights with New Columns for Making Informed Decisions](#)

Audit Trail shows more insights with new columns that provide more context and help you stay informed. The Communication Channel column shows the channel used by a customer in an engagement interaction. The Verification Type column shows the type of verification, primary or secondary, associated with an audit record.

#### [Drill Down to Quickly Access Detailed Information for Better Decision Making](#)

The Initiating Attendee Type column now has links for the audit records of secondary verification type. Click the link to see a record's primary and secondary verification details without leaving Audit Trail.

#### [Export Audit Trail Records Effortlessly and Unlock Their Full Potential](#)

You can now modify the filter criteria and export up to 50,000 records from Audit Trail to a CSV file for archival, sharing, analysis, or compliance purposes. You can continue working while the export happens in the background. When the export is complete, you receive an email notification.

#### [Manage Exported Data and Ensure Customer Privacy with Audit Trail Export Dashboard](#)

Now you can easily download or delete exported files with the new Audit Trail Export Dashboard.

### SEE ALSO:

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

## Monitor Secondary Identity Verification Audit Records to Ensure Privacy and Security of Customers

You can now monitor and analyze the secondary identity verification audit records to ensure the privacy and security of customers. The records are generated when contact center agents use the identity verification flow to verify the identity of customers.

**Where:** This change applies to Lightning Experience in clouds where Audit Trail is available.

**Who:** To use this feature, users need the Industry Service Excellence add-on license.


**How:** From Setup, on the Profiles page, make the Audit Trail tab available for the System Administrator profile so that Salesforce admins can access Audit Trail.

## Experience Better User Interface with All Your Filters in One Place

A single pop-up window now displays all filter options to simplify the filtering process and save you time.

**Where:** This change applies to Lightning Experience in clouds where Audit Trail is available.

**Who:** To use this feature, users need the Industry Service Excellence add-on license.

**How:** Access Audit Trail, and click  to see all the filter options in a pop-up window.

## Use New Filters to Improve Efficiency by Quickly Finding Information

With two new filter options, verification status and initiating attendee, you can now filter audit records with more granularity and find the information you need quickly. Verification status helps you filter audit records based on success or failure of identity verification. You can further narrow down the audit records by specifying the initiating attendee of engagement interactions.

**Where:** This change applies to Lightning Experience in clouds where Audit Trail is available.

**Who:** To use this feature, users need the Industry Service Excellence add-on license.

**How:** Access Audit Trail, and click  to specify the filter criteria.

## Expand Your Insights with New Columns for Making Informed Decisions

Audit Trail shows more insights with new columns that provide more context and help you stay informed. The Communication Channel column shows the channel used by a customer in an engagement interaction. The Verification Type column shows the type of verification, primary or secondary, associated with an audit record.

**Where:** This change applies to Lightning Experience in clouds where Audit Trail is available.

**Who:** To use this feature, users need the Industry Service Excellence add-on license.

## Drill Down to Quickly Access Detailed Information for Better Decision Making

The Initiating Attendee Type column now has links for the audit records of secondary verification type. Click the link to see a record's primary and secondary verification details without leaving Audit Trail.

**Where:** This change applies to Lightning Experience in clouds where Audit Trail is available.

**Who:** To use this feature, users need the Industry Service Excellence add-on license.

**How:** Access Audit Trail, and click the link in the Initiating Attendee Type column.

## Export Audit Trail Records Effortlessly and Unlock Their Full Potential

You can now modify the filter criteria and export up to 50,000 records from Audit Trail to a CSV file for archival, sharing, analysis, or compliance purposes. You can continue working while the export happens in the background. When the export is complete, you receive an email notification.

**Where:** This change applies to Lightning Experience in clouds where Audit Trail is available.

**Who:** To use this feature, users need the Industry Service Excellence add-on license.

**How:** Access Audit Trail, and click . Specify the filter criteria, and export the data.

## Manage Exported Data and Ensure Customer Privacy with Audit Trail Export Dashboard

Now you can easily download or delete exported files with the new Audit Trail Export Dashboard.

**Where:** This change applies to Lightning Experience in clouds where Audit Trail is available.

**Who:** To use this feature, users need the Industry Service Excellence add-on license.

**How:** From Setup, access the Audit Trail Export Dashboard page. Then, click the **Delete** or **Download** link.

## Batch Management

Batch management now supports running Data Processing Engine definitions that include Forecast nodes.

### IN THIS SECTION:

[Changed Object in Batch Management](#)

Do more with this changed Batch Management object.

## Changed Object in Batch Management

Do more with this changed Batch Management object.

### Run a Data Processing Engine definition that contains a Forecast Node

Use the new value `Forecast` in the existing Type field on the BatchJobPart object.

## Business Rules Engine

To understand the reasoning behind the output of an expression set that has Decision Explorer enabled, capture action logs each time the expression set is run from Salesforce Flow. To simulate an expression set version that has a large number of input variables, pass the variable values in JSON format. Export decision matrix versions to DMN files and reuse them outside Business Rules Engine.

### IN THIS SECTION:

[Export Decision Matrix Versions for Reuse Outside Business Rules Engine](#)

Make it easier to collaborate on business decisions by exporting decision matrix versions to Decision Model and Notation (DMN) files. DMN is a standardized specification for writing business rules. With DMN files, you can reuse a matrix version created in Business Rules Engine in any tool that supports DMN files. This release supports exporting matrix versions to DMN files only through connect APIs. The exported files can be downloaded from a decision matrix version's record detail page in the Business Rules Engine app.

[Use Currency and Date/Time Data Types in Decision Tables](#)

Create a wider range of rules in decision tables using the Currency and Date/Time data types. With the support for the Currency data type, you can now look up decision tables that use the Currency data type from expression set versions.

[Clone Expression Sets](#)

If you want to modify an expression set's versions without affecting the original expression set, clone the expression set. Cloning an expression set clones all the versions in the expression set. You can copy the versions of an expression set that's used as a subexpression in another expression set or is referenced in a flow, without breaking the calling expression set or flow.

[Capture Action Logs for Expression Sets Called from Salesforce Flow](#)

When a flow calls an expression set that has Decision Explorer enabled, action logs are now generated for every run of the expression set. Action logs show the rationale behind the expression set's output. To capture action logs, you specify the record ID of the object for the `__actionContextCode` parameter, and the explainability action definition or the purpose for which the expression set is used for the `__specName` parameter.

[View Business Elements as First-Level Elements in Expression Set Builder](#)

Business elements shipped with your cloud are now listed as first-level elements and look like standard step elements. Previously, you had to add a business element as a step on the builder canvas, and then search for and select the business element from the available list.



### [Simulate Expression Set Versions Using JSON Input](#)

Want to simulate an expression set version that has a large number of input variables? You can now pass the input data in JSON format using the Advanced input mode for simulation. With the Advanced input mode, you can enter the input values in the JSON input text area. Previously, all the input variables in the version only appeared as fields, and you entered values for each field. The JSON input option simplifies and speeds up the process of passing input variables, especially when you have a large number of values to input.

### [Changed Object in Business Rules Engine](#)

Do more with this changed Business Rules Engine object.

### [Connect REST APIs](#)

Connect REST APIs for Business Rules Engine help customers, partners, and ISVs integrate with Salesforce software and UIs.

### [New and Changed Business Rules Engine Metadata Types](#)

Make the most of the new and changed metadata types of Business Rules Engine.

## Export Decision Matrix Versions for Reuse Outside Business Rules Engine

Make it easier to collaborate on business decisions by exporting decision matrix versions to Decision Model and Notation (DMN) files. DMN is a standardized specification for writing business rules. With DMN files, you can reuse a matrix version created in Business Rules Engine in any tool that supports DMN files. This release supports exporting matrix versions to DMN files only through connect APIs. The exported files can be downloaded from a decision matrix version's record detail page in the Business Rules Engine app.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions for Industries clouds where Business Rules Engine is enabled.

SEE ALSO:

[Salesforce Help: Download Matrix Versions Exported to DMN Files](#)

[Salesforce Help: Limitations for Exporting Matrix Versions to DMN Files](#)

## Use Currency and Date/Time Data Types in Decision Tables

Create a wider range of rules in decision tables using the Currency and Date/Time data types. With the support for the Currency data type, you can now look up decision tables that use the Currency data type from expression set versions.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions for Industries clouds where Business Rules Engine is enabled.


SEE ALSO:

[Salesforce Help: Supported Data Types and Operators in Decision Tables](#)

## Clone Expression Sets

If you want to modify an expression set's versions without affecting the original expression set, clone the expression set. Cloning an expression set clones all the versions in the expression set. You can copy the versions of an expression set that's used as a subexpression in another expression set or is referenced in a flow, without breaking the calling expression set or flow.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions for Industries clouds where Business Rules Engine is enabled.

**How:** From the record detail page of an expression set, click , and select **Clone**. Enter a new name for the cloned expression set.

SEE ALSO:

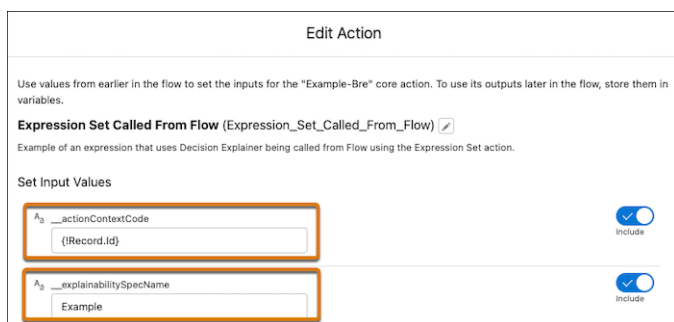
[Salesforce Help: Clone an Expression Set](#)

## Capture Action Logs for Expression Sets Called from Salesforce Flow

When a flow calls an expression set that has Decision Explorer enabled, action logs are now generated for every run of the expression set. Action logs show the rationale behind the expression set's output. To capture action logs, you specify the record ID of the object for the `__actionContextCode` parameter, and the explainability action definition or the purpose for which the expression set is used for the `__specName` parameter.


**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions for Industries clouds where Business Rules Engine is enabled.

**How:** Select the expression set that you want to call, and specify values for the `__actionContextCode` and `__specName` parameters.



**Edit Action**

Use values from earlier in the flow to set the inputs for the "Example-Bre" core action. To use its outputs later in the flow, store them in variables.

**Expression Set Called From Flow** (Expression\_Set\_Called\_From\_Flow) 

Example of an expression that uses Decision Explorer being called from Flow using the Expression Set action.

**Set Input Values**

A3 __actionContextCode	<input type="text" value="{!Record.Id}"/>	<input checked="" type="checkbox"/> Include
A3 __explainabilitySpecName	<input type="text" value="Example"/>	<input checked="" type="checkbox"/> Include

In this example:

- `{!Record.Id}` represents the flow variable named Record, of the type Record to capture action logs for the expression set in context of an object. The variable Record is related to the Contact object, and .Id represents the record ID of the object.
- Example is the name of the Explainability Action Definition against which the expression set is run from Flow.

SEE ALSO:

[Salesforce Help: Invoke an Expression Set That Uses Decision Explorer from a Flow](#)


[Salesforce Help: Example of Invoking a Decision Explorer Enabled Expression Set from Flow](#)

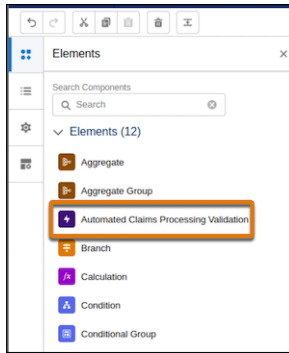
[Salesforce Help: Decision Explorer for Expression Sets](#)

## View Business Elements as First-Level Elements in Expression Set Builder

Business elements shipped with your cloud are now listed as first-level elements and look like standard step elements. Previously, you had to add a business element as a step on the builder canvas, and then search for and select the business element from the available list.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions for Industries clouds where Business Rules Engine is enabled.

**How:** Open an expression set version in the builder, and click + to view and add business elements. You can also view the elements by clicking  on the builder canvas.

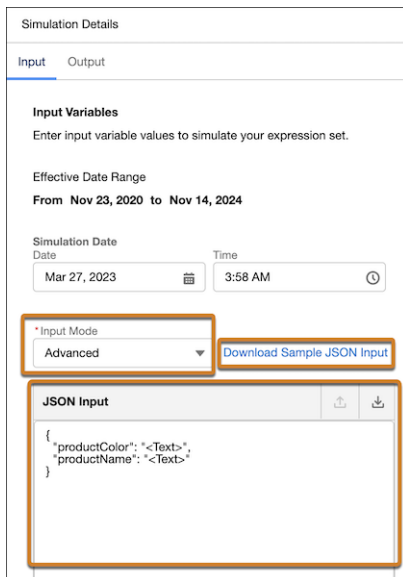


## Simulate Expression Set Versions Using JSON Input

Want to simulate an expression set version that has a large number of input variables? You can now pass the input data in JSON format using the Advanced input mode for simulation. With the Advanced input mode, you can enter the input values in the JSON input text area. Previously, all the input variables in the version only appeared as fields, and you entered values for each field. The JSON input option simplifies and speeds up the process of passing input variables, especially when you have a large number of values to input.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions for Industries clouds where Business Rules Engine is enabled.

**How:** On the simulation screen, for Input Mode, select **Advanced**. Replace placeholders in the text area with the values you want to use for the simulation. When you simulate the expression set version again, the values you enter are retained in the text area. To simulate using different values, modify the JSON input.



SEE ALSO:

[Salesforce Help: Simulate and Activate Your Expression Set Version](#)

## Changed Object in Business Rules Engine

Do more with this changed Business Rules Engine object.

**View the status of exporting a decision matrix version to a DMN file**

Use the new `DscnModelNoteExportStatus` field in the `CalculationMatrixVersion` object.

**Connect REST APIs**

Connect REST APIs for Business Rules Engine help customers, partners, and ISVs integrate with Salesforce software and UIs.

**Create an expression set in Business Rules Engine**

Make a POST request to the new `/connect/business-rules/expression-set` resource.

New request body: Expression Set Input

New response body: Expression Set

**Export a decision matrix to a Decision Model Notation (DMN) file**

Make a POST request to the new `/connect/business-rules/decision-models/export` resource.

New request body: Decision Model Export Input

New response body: Decision Model Export Output

**Perform a lookup on a decision table**

Make a POST request to the new `/connect/business-rules/decision-table/lookup/` resource.

New request body: Decision Table Input

New response body: Decision Table Outcome

**Invoke a decision table by passing multiple input conditions within the same request**

Make a POST request to the new `/connect/business-rules/decision-table/lookup/${decisionTableId}` resource.

New request body: Decision Table Bulk Input

New response body: Decision Table Bulk Outcome

**Create a decision table definition in Business Rules Engine**

Make a POST request to the new `/connect/business-rules/decision-table/definitions` resource.

New request body: Decision Table Definition Input

New response body: Decision Table Output

**Get and delete a decision table definition**

Make a GET and DELETE request to the new `/connect/business-rules/decision-table/definitions/${decisionTableId}` resource.

New response body: Decision Table Output

**Update a decision table definition**

Make a PATCH request to the new `/connect/business-rules/decision-table/definitions/${decisionTableId}` resource.

New request body: Decision Table Definition Input

New response body: Decision Table Output

### Retrieve dependencies of an expression set in Business Rules Engine

Make a GET request to the new

```
/connect/business-rules/expression-set/version/${expressionSetVersionId}/dependencies
```

resource.

New response bodies: Dependency Detail Output and Expression Set Version Dependency.

SEE ALSO:

[Salesforce Developer Guide: Business Rules Engine Business APIs](#)

## New and Changed Business Rules Engine Metadata Types

Make the most of the new and changed metadata types of Business Rules Engine.

### Metadata Types

#### Determine whether the decision explanation is exposed to external users

Use the new `shouldShowExternally` field on the `ExpressionSetDefinitionVersion` subtype of the `ExpressionSetDefinition` metadata type. Introduced in API version 56.0, this type has been added to the *Industries Common Resources Developer Guide*.

#### Incorporate custom elements into an Expression Set.

Use the new `ExpressionSetCustomElement` subtype of the `ExpressionSetStep` metadata type on the existing `ExpressionSetDefinition` metadata type. Introduced in API version 56.0, this type has been added to the *Industries Common Resources Developer Guide*.

#### Specify a new result type in the message template

Use the new `NoResult` value in the existing `evaluationResult` field on the `ExplainabilityMsgTemplate` metadata type.

#### Specify new step types in an expression set in explainability message template.

Use the new `ListEnabledGroup`, `ListFilter`, and `ReferenceProcedure` values in the existing `expressionSetStepType` field on the `ExplainabilityMsgTemplate` metadata type.

## Data Processing Engine

Use a forecast node in a Data Processing Engine definition to generate forecasts based on today's data to make informed business decisions. Use variables of type expression in a formula node when you don't know the exact evaluation or calculation logic when creating a definition.

### IN THIS SECTION:

[Use Today's Data to Make Business Decisions for the Future](#)

Make informed business decisions for the future by using the forecasts generated from the data that you have available today. Use the new Forecast node in a Data Processing Engine definition to select the data that you want to use as the forecast source, and configure forecast settings for specified time periods in the future.

[Use Variables of Type Expression as Placeholders in Definitions](#)

When you don't know the exact evaluation or calculation logic to use in a definition before you run it, you can use a variable of type expression as a placeholder in a formula node. For example, you want to mark transactions within the current financial year as active, but you don't know the logic of what is considered the current financial year when you're designing the definition. You can use a placeholder expression and populate it with the relevant value when you run the definition.

### New and Changed Data Processing Engine Metadata Type

Make the most of the new metadata type in Data Processing Engine.

## Use Today's Data to Make Business Decisions for the Future

Make informed business decisions for the future by using the forecasts generated from the data that you have available today. Use the new Forecast node in a Data Processing Engine definition to select the data that you want to use as the forecast source, and configure forecast settings for specified time periods in the future.

**Where:** This change applies to Lightning Experience in Enterprise, Professional, and Unlimited editions where Data Processing Engine is enabled.

**How:** In a Data Processing Engine definition, create a node with the type Forecast, and enter the details. Then configure the forecast settings.

The screenshot displays the 'Forecast: Example' configuration window. It includes a 'Source Node' section with a search bar and 'Selected Group Fields (2)'. The 'Aggregate Source Data' section has an 'Aggregate Function' dropdown set to 'Sum', a 'Field' dropdown set to 'Quantity', and an 'Aggregation Result Label' field set to 'TotalOrderQuantity'. Below this is an 'Add Field' button. The 'Forecast Settings' section contains a 'Date Field' dropdown set to 'CreatedDate', a 'Forecast Period Type' dropdown set to 'Year-Month', a 'Period Start Date Name' dropdown set to 'MonthlyOrders', a 'Forecast Period Count' slider set to '1-100', and an 'Exclude last period' checkbox that is unchecked. The 'Additional Forecast Settings' section at the bottom includes a 'Seasonality' dropdown set to 'None', a 'Forecast Model Type' dropdown set to 'Auto', and an 'Accuracy Percent' dropdown set to '95'.

SEE ALSO:

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

## Use Variables of Type Expression as Placeholders in Definitions

When you don't know the exact evaluation or calculation logic to use in a definition before you run it, you can use a variable of type expression as a placeholder in a formula node. For example, you want to mark transactions within the current financial year as active, but you don't know the logic of what is considered the current financial year when you're designing the definition. You can use a placeholder expression and populate it with the relevant value when you run the definition.

**Where:** This change applies to Lightning Experience in Enterprise, Professional, and Unlimited editions where Data Processing Engine is enabled.

**How:** When you define a new input variable in your Data Processing Engine definition, select the type as Expression. In the Value field, enter the default expression. Use the variable in a formula node. When you run the definition, provide a value for the expression if you want to override the default.

SEE ALSO:

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

## New and Changed Data Processing Engine Metadata Type

Make the most of the new metadata type in Data Processing Engine.

## Metadata Type

### Specify a collection of fields relating to a forecast node

Use the new BatchCalcJobForecast subtype of the BatchCalcJobDefinition metadata type.

## Discovery Framework Enhancements

Now you can edit a signature before submitting the assessment form. Guest users can access OmniScripts of the Discovery Framework type on Experience Cloud sites. Read about these enhancements and more.

### IN THIS SECTION:

#### [Edit the Signature on the Assessment Signature Component](#)

Respondents can now update their signatures before submitting the assessment forms. Previously, respondents were unable to edit their signatures to fix any errors. Editing the signature updates all instances of a signature on the form.

#### [Discovery Framework Support for Guest Users](#)

Starting with Spring '23, Experience Cloud Guest Users can automatically access OmniScripts of the Discovery Framework type. Deploy Discovery Framework components on Experience sites for guest users.

#### [New Discovery Framework Object Field](#)

Do more with a new Discovery Framework object field.

### SEE ALSO:

[Discovery Framework Enhancements](#)

## Edit the Signature on the Assessment Signature Component

Respondents can now update their signatures before submitting the assessment forms. Previously, respondents were unable to edit their signatures to fix any errors. Editing the signature updates all instances of a signature on the form.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions where Financial Services Cloud or the Health Cloud license is enabled.

**How:** On the Assessment Signature component, click **Edit Signature**.

### SEE ALSO:

[Capture Respondents' Signature on the Form \(can be outdated or unavailable during release preview\)](#)

## Discovery Framework Support for Guest Users

Starting with Spring '23, Experience Cloud Guest Users can automatically access OmniScripts of the Discovery Framework type. Deploy Discovery Framework components on Experience sites for guest users.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions where either Financial Services Cloud or the Health Cloud license is enabled.

### SEE ALSO:

[Grant Digital Experience Guest Users Access to Discovery Framework OmniScripts \(can be outdated or unavailable during release preview\)](#)

## New Discovery Framework Object Field

Do more with a new Discovery Framework object field.

## New Field on Assessment Question Response

Use the new `RespondentTimezone` field to view the auto-generated timezone of the respondent submitting the assessment response.

SEE ALSO:

[Discovery Framework Standard Objects \(can be outdated or unavailable during release preview\)](#)

## Einstein Relationship Insights

Expand the scope of your relationship recommendations by exploring case notes captured by interaction summaries.

IN THIS SECTION:

### [Amplify Your Connections by Exploring Case Notes](#)

By using Salesforce Files as a content source, case workers can now view Public Sector Solutions case notes that are captured by Financial Services Cloud Interaction Summaries, and expand relationship recommendations. Case workers can read the case notes that reference people and companies to understand their relationships and past interactions, and better prepare for interactions with new people or companies.

## Amplify Your Connections by Exploring Case Notes

By using Salesforce Files as a content source, case workers can now view Public Sector Solutions case notes that are captured by Financial Services Cloud Interaction Summaries, and expand relationship recommendations. Case workers can read the case notes that reference people and companies to understand their relationships and past interactions, and better prepare for interactions with new people or companies.

**Where:** This feature is available in Lightning Experience in Professional, Enterprise, and Unlimited editions where Einstein Relationship Insights Growth and Salesforce Files are enabled.

**How:** From the Einstein Relationship Insights component settings page, under Connect Content Sources, select **Salesforce Files** as a content source. Use relevant keywords to search for case notes of an account or a contact.

## Engagement

Contact center agents (CCAs) can now accept customer requests through standard SMS, standard and enhanced Facebook Messenger, and enhanced WhatsApp. CCAs can create list views to filter their Engagement Attendee, Engagement Interaction, and Engagement Topic records. In addition, CCAs can experience better user interface performance due to the migration of engagement-related user interface components from Aura to Lightning Web Component (LWC). Moreover, CCAs can benefit from improved accessibility due to compliance with the color contrast requirements of Web Content Accessibility Guidelines (WCAG) 2.1. Administrators can create LWC quick actions on Engagement Interaction, Engagement Attendee, and Engagement Topic objects.

IN THIS SECTION:

### [Improve Customer Satisfaction by Providing Support Through Social Channels](#)

Engagement now includes support for standard SMS, standard and enhanced Facebook Messenger, and enhanced WhatsApp. You can now enable contact center agents to receive requests when your customers prefer to interact through these channels.



### [Access Your Records Quickly with New List View Filters](#)

Contact center agents (CCAs) can now create personalized list views using the new My engagement attendees, My engagement interactions, and My engagement topics filters. The list views improve CCAs' productivity and efficiency by helping them quickly find the records they need.

### [Enjoy Enhanced User Interface Performance with LWC Framework](#)

Your contact center agents (CCAs) have a better user experience now that the Engagement Attendee, Engagement Interaction, and Engagement Topic list view pages and related forms are migrated from Aura to the more efficient Lightning Web Component (LWC) framework.

### [Increase User Satisfaction Through Enhanced Accessibility](#)

Engagement-related pages are now compliant with the color contrast requirements of Web Content Accessibility Guidelines (WCAG) 2.1. The compliance improves accessibility for contact center agents who find it difficult to differentiate between some color combinations.

### [Access Actions Conveniently with LWC Quick Actions](#)

Create Lightning Web Component (LWC) quick actions on the Engagement Attendee, Engagement Interaction, and Engagement Topic objects to help contact center agents (CCAs) quickly perform routine actions without having to navigate to multiple screens. Easy access to actions streamlines business processes and helps CCAs meet business goals efficiently.

SEE ALSO:

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

## Improve Customer Satisfaction by Providing Support Through Social Channels

Engagement now includes support for standard SMS, standard and enhanced Facebook Messenger, and enhanced WhatsApp. You can now enable contact center agents to receive requests when your customers prefer to interact through these channels.

**Where:** This change applies to Lightning Experience in clouds where engagement objects are available.

**Who:** To use this feature, users need the Industry Service Excellence add-on license and Messaging User permission set.

**How:** Set up Omni-Channel for SMS, Facebook Messenger, or WhatsApp. Assign the Messaging User permission set to the users who use the chat feature.

## Access Your Records Quickly with New List View Filters

Contact center agents (CCAs) can now create personalized list views using the new My engagement attendees, My engagement interactions, and My engagement topics filters. The list views improve CCAs' productivity and efficiency by helping them quickly find the records they need.

**Where:** This change applies to Lightning Experience in clouds where engagement objects are available.

**Who:** To use this feature, users need the Industry Service Excellence add-on license.

**How:** Visit Engagement Attendees, Engagement Interactions, or Engagement Topics list view. Create a list view using the List View Controls menu. By default, the My engagement attendees, My engagement interactions, or My engagement topics filter is applied.

## Enjoy Enhanced User Interface Performance with LWC Framework

Your contact center agents (CCAs) have a better user experience now that the Engagement Attendee, Engagement Interaction, and Engagement Topic list view pages and related forms are migrated from Aura to the more efficient Lightning Web Component (LWC) framework.

**Where:** This change applies to Lightning Experience in clouds where engagement objects are available.

**Who:** To use this feature, users need the Industry Service Excellence add-on license.

## Increase User Satisfaction Through Enhanced Accessibility

Engagement-related pages are now compliant with the color contrast requirements of Web Content Accessibility Guidelines (WCAG) 2.1. The compliance improves accessibility for contact center agents who find it difficult to differentiate between some color combinations.

**Where:** This change applies to Lightning Experience in clouds where engagement objects are available.

**Who:** To use this feature, users need the Industry Service Excellence add-on license.

## Access Actions Conveniently with LWC Quick Actions

Create Lightning Web Component (LWC) quick actions on the Engagement Attendee, Engagement Interaction, and Engagement Topic objects to help contact center agents (CCAs) quickly perform routine actions without having to navigate to multiple screens. Easy access to actions streamlines business processes and helps CCAs meet business goals efficiently.

**Where:** This change applies to Lightning Experience in clouds where engagement objects are available.

**Who:** To use this feature, users need the Industry Service Excellence add-on license.

**How:** Create an LWC quick action and select Engagement Attendee, Engagement Interaction, or Engagement Topic as the target object.

## Identity Verification

Contact center agents (CCAs) can now verify the identity of customers who contact through standard SMS, standard and enhanced Facebook Messenger, and enhanced WhatsApp and add customers' verification answers to form fields. Administrators can configure whether a verification field is shown as a form or radio button to CCAs. In addition administrators can configure the record page that's shown to CCAs after identity verification is successful. The identity verification flows, which have new names, have been updated, and developers can use a new API for form-based identity verification.

### IN THIS SECTION:

#### [Verify Customer Identity in Social Channels](#)

Let customers verify their identity through their preferred messaging channel. Now when customers request help through standard SMS, standard and enhanced Facebook Messenger, and enhanced WhatsApp, contact center agents can verify identity before completing the request. In Omni-Channel, configure which methods you want to support.

#### [Configure Linked Record Page to Align the Identity Verification Process with Business Requirements](#)

Configure the linked object record page that is shown to contact center agents after they successfully verify a customer. The configuration helps streamline business processes.

#### [Improve Security Using Form Fields During Identity Verification Process](#)

Configure verification fields to show as radio buttons or form fields. Form fields enhance the confidentiality and security of customers' personal information. Form-based verification increases the reliability of the verification process by ensuring that contact center agents are verifying customers correctly. You can also use form fields to adhere data protection laws.

#### [Clone the Renamed and Updated Verification Flows for Clarity and Consistency](#)

The renamed and updated flows use a more consistent resource naming convention. The new versions have V2 added to their name. Get started by cloning the Verify Customer Identity V2, Verify Linked Customer Identity V2, and Verify Customer Identity Base V2 flows.

#### [Changed Object in Identity Verification](#)

Provide a flexible identity verification process through the changed object.

### [New Connect REST API Resources](#)

These resources are new.

SEE ALSO:

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

## Verify Customer Identity in Social Channels

Let customers verify their identity through their preferred messaging channel. Now when customers request help through standard SMS, standard and enhanced Facebook Messenger, and enhanced WhatsApp, contact center agents can verify identity before completing the request. In Omni-Channel, configure which methods you want to support.

**Where:** This change applies to Lightning Experience in clouds where identity verification flows are available.

**Who:** To use this feature, users need the Industry Service Excellence add-on license and Messaging User permission set.

## Configure Linked Record Page to Align the Identity Verification Process with Business Requirements

Configure the linked object record page that is shown to contact center agents after they successfully verify a customer. The configuration helps streamline business processes.

**Where:** This change applies to Lightning Experience in clouds where identity verification flows are available.

**Who:** To use this feature, users need the Industry Service Excellence add-on license.

**How:** In Setup, go to the Identity Verification Process Details page. For Display Record Field Name, enter the name of the field that contains information about the linked record shown to CCAs after successful verification.

## Improve Security Using Form Fields During Identity Verification Process

Configure verification fields to show as radio buttons or form fields. Form fields enhance the confidentiality and security of customers' personal information. Form-based verification increases the reliability of the verification process by ensuring that contact center agents are verifying customers correctly. You can also use form fields to adhere data protection laws.

**Where:** This change applies to Lightning Experience in clouds where identity verification flows are available.

**Who:** To use this feature, users need the Industry Service Excellence add-on license.

**How:** On the Identity Verification Process Field page in Setup, select **Manual Input**.

## Clone the Renamed and Updated Verification Flows for Clarity and Consistency

The renamed and updated flows use a more consistent resource naming convention. The new versions have V2 added to their name. Get started by cloning the Verify Customer Identity V2, Verify Linked Customer Identity V2, and Verify Customer Identity Base V2 flows.

**Where:** This change applies to Lightning Experience in clouds where identity verification flows are available.

**Who:** To use this feature, users need the Industry Service Excellence add-on license.

## Changed Object in Identity Verification

Provide a flexible identity verification process through the changed object.

**Store the name of the field that contains information about the record that's shown to the contact center agent after identity verification is successful**

Use the new `DisplayRecordFieldName` field on the existing `IdentityVerificationProcDtl` object.

## New Connect REST API Resources

These resources are new.

### Identity Verification

#### Validate the identity verification inputs of a customer that are provided through form fields

Make a POST request to the new `/connect/identity-verification/input-verification`

New request body: Form Verification Input

New response body: Form Verification

## Industry Integration Solutions

### IN THIS SECTION:

#### [Complete Your Business Use Case Quickly by Enabling Dependent Apps](#)

An integration can depend on multiple apps. Often, these apps are used by multiple integrations. For example, the System API app that connects to the SAP S/4 HANA system. You can now quickly see and enable such dependent apps of an integration and complete your business use case easily.

### Complete Your Business Use Case Quickly by Enabling Dependent Apps

An integration can depend on multiple apps. Often, these apps are used by multiple integrations. For example, the System API app that connects to the SAP S/4 HANA system. You can now quickly see and enable such dependent apps of an integration and complete your business use case easily.

**Where:** This feature applies to Lightning Experience in the following clouds where Industry Integration Solutions is enabled.

- Health Cloud
- Communications Cloud
- Energy and Utilities Cloud
- Financial Services Cloud

The integrations apps deployed on MuleSoft are available only in CloudHub 1.0.

## Intelligent Document Reader

Automatically extract text from uploaded documents and get the active OCR template details by using Flow actions.

### IN THIS SECTION:

#### [Extract Text and Get Template Details Automatically](#)

Extract text from an uploaded document or get the active OCR template details by using Flow actions.

#### [New Invocable Actions in Intelligent Document Reader](#)

Use the new invocable actions for Intelligent Document Reader.

#### [New 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.

### [DocumentReader Namespace](#)

The DocumentReader namespace has these new classes.

## Extract Text and Get Template Details Automatically

Extract text from an uploaded document or get the active OCR template details by using Flow actions.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions of Financial Services Cloud, Health Cloud, and Public Sector Cloud that have Intelligent Document Reader.

**How:** Create a flow that contains these actions.

- To initiate text extraction for an uploaded document, add the Initiate Text Extraction action, and then specify the content document ID of the uploaded document and the OCR service to use for text extraction.
- To extract text from an uploaded document, add the Fetch Extracted Text action and then specify the content document ID of the uploaded document.
- To get active OCR template details, add the Fetch Active OCR Templates action and then specify the document types or the target objects to get the related active OCR template details.

SEE ALSO:

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

[Salesforce Help: Sample Flow to Extract and Store Text in Records \(can be outdated or unavailable during release preview\)](#)

## New Invocable Actions in Intelligent Document Reader

Use the new invocable actions for Intelligent Document Reader.

### **Extract text from an uploaded document**

Use the new `initiateTextExtraction` action.

### **Fetch all the active OCR templates in an org**

Use the new `fetchActiveOcrTemplates` action.

### **Fetch the text extracted from an uploaded document**

Use the new `fetchExtractedText` action.

SEE ALSO:

[Industries Common Resources Developer Guide: Intelligent Document Reader Standard Invocable Actions \(can be outdated or unavailable during release preview\)](#)

## New Intelligent Document Reader Metadata Types

Make the most of the new and changed metadata types of Intelligent Document Reader.

## Metadata Type

### Extract text from an uploaded document

Use the new `initiateTextExtraction` value in the existing `actionType` field, which is on the existing `FlowActionCall` subtype of the Flow metadata type.

### Fetch all the active OCR templates in an org

Use the new `fetchActiveOcrTemplates` value in the existing `actionType` field, which is on the existing `FlowActionCall` subtype of the Flow metadata type.

### Fetch the text extracted from an uploaded document

Use the new `fetchExtractedText` value in the existing `actionType` field, which is on the existing `FlowActionCall` subtype of the Flow metadata type.

#### SEE ALSO:

[Industries Common Resources Developer Guide: Intelligent Document Reader Metadata API Types \(can be outdated or unavailable during release preview\)](#)

## 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](#)

Here are the changed response bodies.

## Changed Connect REST API Response Bodies

Here are the changed response bodies.

### OCR Document Scan Result

#### ODSR Detailed Output

This response body has this new property.

- `ocrService`—Name of the service that gets the extraction results.

#### SEE ALSO:

[Industries Common Resources Developer Guide: ODSR Detailed Output \(can be outdated or unavailable during release preview\)](#)

## DocumentReader Namespace

The `DocumentReader` namespace has these new classes.

### New Classes

#### Store the extracted value from the document and its confidence score

Use the new `ExtractedValue` class.

**Store the extracted key-value pairs from the document**

Use the new `KeyValue` class.

**Store the OCR document scan result**

Use the new `OcrDocumentScanResult` class.

**Store the details of the OCR document scan result**

Use the new `OcrDocumentScanResultDetail` class.

**Store the parameters for the output of the Fetch Extracted Text invocable action**

Use the new `OcrDocumentScanResultDetailsList` class.

**Store the parameters for the output of the Initiate Text Extraction invocable action**

Use the new `OcrDocumentScanResultList` class.

**Store the details of the OCR target object associated with an OCR template**

Use the new `OcrTargetObject` class.

**Store the details of the OCR template**

Use the new `OcrTemplate` class.

**Store the list of active OCR templates returned by the Fetch Active OCR Templates invocable action**

Use the new `OcrTemplatesList` class.

SEE ALSO:

[Industries Common Resources Developer Guide: DocumentReader Namespace](#)

## Intelligent Form Reader

Automatically extract text from uploaded documents and get the active OCR template details by using Flow actions.

### IN THIS SECTION:

[Extract Text and Get Template Details Automatically](#)

Extract text from an uploaded document or get the active OCR template details by using Flow actions.

[New Invocable Actions in Intelligent Form Reader](#)

Use the new invocable actions for Intelligent Form Reader.

[New Intelligent Form Reader Metadata Types](#)

Make the most of the new and changed metadata types of Intelligent Form Reader.

[Connect REST API](#)

Use Intelligent Form Reader Business APIs to automatically extract data from uploaded documents and to store the data in Salesforce objects.

### Extract Text and Get Template Details Automatically

Extract text from an uploaded document or get the active OCR template details by using Flow actions.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions of Financial Services Cloud, Health Cloud, and Public Sector Cloud that have Intelligent Form Reader.

**How:** Create a flow that contains these actions.

- To initiate text extraction for an uploaded document, add the Initiate Text Extraction action, and then specify the content document ID of the uploaded document and the OCR service to use for text extraction.
- To extract text from an uploaded document, add the Fetch Extracted Text action and then specify the content document ID of the uploaded document.
- To get active OCR template details, add the Fetch Active OCR Templates action and then specify the document types or the target objects to get the related active OCR template details.

SEE ALSO:

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

[Salesforce Help: Sample Flow to Extract and Store Text in Records \(can be outdated or unavailable during release preview\)](#)

## New Invocable Actions in Intelligent Form Reader

Use the new invocable actions for Intelligent Form Reader.

### **Extract text from an uploaded document**

Use the new `initiateTextExtraction` action.

### **Fetch all the active OCR templates in an org**

Use the new `fetchActiveOcrTemplates` action.

### **Fetch the text extracted from an uploaded document**

Use the new `fetchExtractedText` action.

SEE ALSO:

[Industries Common Resources Developer Guide: Intelligent Form Reader Standard Invocable Actions \(can be outdated or unavailable during release preview\)](#)

## New Intelligent Form Reader Metadata Types

Make the most of the new and changed metadata types of Intelligent Form Reader.

### Metadata Type

#### **Extract text from an uploaded document**

Use the new `initiateTextExtraction` value in the existing `actionType` field, which is on the `FlowActionCall` subtype of the Flow metadata type.

#### **Fetch all the active OCR templates in an org**

Use the new `fetchActiveOcrTemplates` value in the existing `actionType` field, which is on the `FlowActionCall` subtype of the Flow metadata type.

#### **Fetch the text extracted from an uploaded document**

Use the new `fetchExtractedText` value in the existing `actionType` field, which is on the `FlowActionCall` subtype of the Flow metadata type.

SEE ALSO:

[Industries Common Resources Developer Guide: Intelligent Form Reader Metadata API Types \(can be outdated or unavailable during release preview\)](#)



## Connect REST API

Use Intelligent Form Reader Business APIs to automatically extract data from uploaded documents and to store the data in Salesforce objects.

### IN THIS SECTION:

[Changed Connect REST API Response Bodies](#)

Here are the changed response bodies.

## Changed Connect REST API Response Bodies

Here are the changed response bodies.

### OCR Document Scan Result

#### ODSR Detailed Output

This response body has this new property.

- `ocrService`—Name of the service that gets the extraction results.

### SEE ALSO:

[Industries Common Resources Developer Guide: ODSR Detailed Output \(can be outdated or unavailable during release preview\)](#)

## Outreach List

Sales and service agents can now search for and select an actionable list to view the associated prospects, including existing customers. Actionable lists are grouped by their priority. Agents can now see the assigned prospects in accordion view. The field and value used to sort the prospects are also shown to agents, and prospects are grouped by their engagement status. In addition, agents can update the engagement status of prospects and call them. Developers can use two new APIs to get actionable list records and metadata.

### IN THIS SECTION:

[Do More with the New Outreach List UI](#)

The new user interface (UI) is easier to navigate and shows only relevant information. So, agents can better focus on the actionable list they want to work on. The new search feature helps agents quickly find the actionable list that they need.

[Prioritize Actionable Lists](#)

Provide your sales and service agents with a prioritized list of actionable lists. The priority displayed along with the actionable list name helps agents focus their efforts on the most critical actionable lists and achieve business goals successfully.

[Improve Navigation Through Information Using Accordion View](#)

Accordion view lets sales and service agents expand and collapse Outreach List sections to quickly find and focus on what they're working on without having to scroll through a long list of prospects. Each section indicates the engagement status of the prospects in the selected actionable list. Within an actionable list, list creators can sort the prospects by specifying the sort field and order while configuring the actionable list in the Actionable List Members component. The sort field and value shown under prospects' names help agents focus their efforts on the most important prospects. The new interface also has faster page load times because it loads only the content that agents are currently viewing.

[Call Prospects and Manage Status Within the UI](#)

Agents can call a prospect directly from the record in Outreach List and update the engagement status instantly. After updating the status, the prospect's record automatically moves to the section associated with the selected status.

### [New Connect REST API Resources](#)

These resources are new.

SEE ALSO:

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

## Do More with the New Outreach List UI

The new user interface (UI) is easier to navigate and shows only relevant information. So, agents can better focus on the actionable list they want to work on. The new search feature helps agents quickly find the actionable list that they need.

**Where:** This change applies to Lightning Experience in clouds where Outreach List is available.

**Who:** To use this feature, users need the Industry Sales Excellence add-on license with Actionable Segmentation Engagement permission set.

**How:** Click the header section of Outreach List to search for or select an actionable list.

## Prioritize Actionable Lists

Provide your sales and service agents with a prioritized list of actionable lists. The priority displayed along with the actionable list name helps agents focus their efforts on the most critical actionable lists and achieve business goals successfully.

**Where:** This change applies to Lightning Experience in clouds where Outreach List is available.

**Who:** To use this feature, users need the Industry Sales Excellence add-on license with Actionable Segmentation Engagement permission set.

**How:** Specify the priority of an actionable list while configuring the actionable list in the Actionable List Members component.

## Improve Navigation Through Information Using Accordion View

Accordion view lets sales and service agents expand and collapse Outreach List sections to quickly find and focus on what they're working on without having to scroll through a long list of prospects. Each section indicates the engagement status of the prospects in the selected actionable list. Within an actionable list, list creators can sort the prospects by specifying the sort field and order while configuring the actionable list in the Actionable List Members component. The sort field and value shown under prospects' names help agents focus their efforts on the most important prospects. The new interface also has faster page load times because it loads only the content that agents are currently viewing.

**Where:** This change applies to Lightning Experience in clouds where Outreach List is available.

**Who:** To use this feature, users need the Industry Sales Excellence add-on license with Actionable Segmentation Engagement permission set.

## Call Prospects and Manage Status Within the UI

Agents can call a prospect directly from the record in Outreach List and update the engagement status instantly. After updating the status, the prospect's record automatically moves to the section associated with the selected status.

**Where:** This change applies to Lightning Experience in clouds where Outreach List is available.

**Who:** To use this feature, users need the Industry Sales Excellence add-on license with Actionable Segmentation Engagement permission set.

**How:** Click  to call the prospect. To change the prospect's engagement status, click  and select **Change Status**.

## New Connect REST API Resources

These resources are new.

### Outreach List

#### Get all the actionable lists that are assigned to the calling or querying user

Make a GET request to the new `/connect/sales-excellence/actionable-lists`

New response body: Assigned Actionable Lists

#### Get the actionable list members' statuses, the number of members in each status, and the configured object's metadata for the given Actionable List ID

Make a GET request to the new

`/connect/sales-excellence/actionable-lists/metadata/${actionableListId}`

New response body: Actionable List Metadata

## Record Alerts

Provide access to record alerts. Refine record alerts by using Business Rules Engine. Show alerts from your external systems using Data Consumption Framework.

### IN THIS SECTION:

#### [Turn on Record Alert Access](#)

Give your users access to a record alert anytime they have access to the What Record that is associated with a record alert. The Record Alert Access setting gives your users' access to the Record Alerts that are relevant to them. Previously, if a user wasn't the owner of a record alert, you had to grant access by user or role in sharing settings.

#### [Create Record Alerts Using Business Rules Engine](#)

Automatically show a record alert to your users when a record meets specified conditions. Using the Business Rules Engine, create a custom expression set using the Record Alert custom element. When a record meets the conditions in the expression set, an alert appears to your users. The appearance of the alert is managed by a Record Alert Template. To limit who can see the record alert, add the Get User Data custom element to the expression set. Then configure the element to show the alerts to users only when their User Profile Name or User Role Name meet the conditions.

#### [Show Alerts from Your External System](#)

Your users don't have to leave Salesforce to see important notifications about their clients. Use the Data Consumption Framework with Record Alerts to show alerts in Salesforce that were generated in your external systems. Previously, you could show record alerts from your external system using only APEX files. Using Data Consumption Framework allows Salesforce to communicate with your external system asynchronously. Before Data Consumption Framework for record alerts, there wasn't a way to asynchronously retrieve alerts from your external system to show in Salesforce. The Data Consumption Framework integrates with MuleSoft, or you can use third-party middleware.

#### [New Record Alerts Object](#)

The new Record Alert Data Source Expression Set Definition object represents information about the data source for a record alert and the association with an expression set definition.

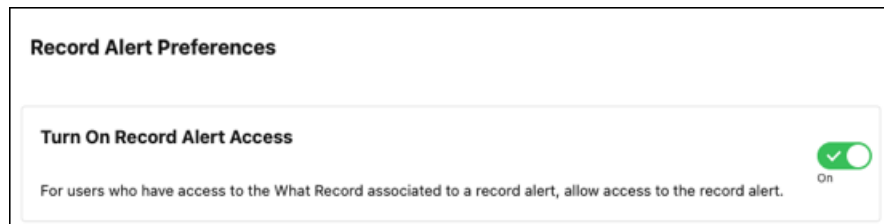
## Turn on Record Alert Access

Give your users access to a record alert anytime they have access to the What Record that is associated with a record alert. The Record Alert Access setting gives your users' access to the Record Alerts that are relevant to them. Previously, if a user wasn't the owner of a record alert, you had to grant access by user or role in sharing settings.

**Where:** This change applies to Lightning Experience in clouds where Record Alerts is available.

**Who:** To use this feature, users need Industries Service Excellence permission set.

**Why:** When the setting is turned on, users who have access to the What Record on a Record Alert now have read access to the Record Alerts associated with the What Record, even if the owner of the record alert didn't grant the user access to the record alert.



SEE ALSO:

[Turn on Record Alerts \(can be outdated or unavailable during release preview\)](#)

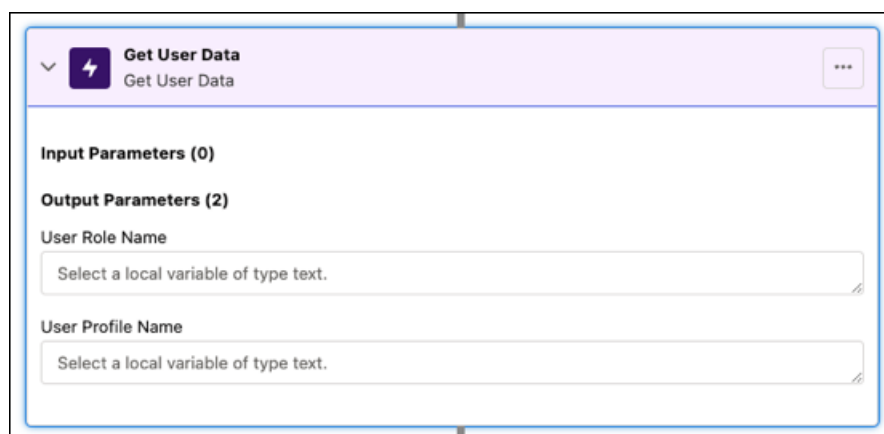
## Create Record Alerts Using Business Rules Engine

Automatically show a record alert to your users when a record meets specified conditions. Using the Business Rules Engine, create a custom expression set using the Record Alert custom element. When a record meets the conditions in the expression set, an alert appears to your users. The appearance of the alert is managed by a Record Alert Template. To limit who can see the record alert, add the Get User Data custom element to the expression set. Then configure the element to show the alerts to users only when their User Profile Name or User Role Name meet the conditions.

**Where:** This change applies to Lightning Experience in clouds where Record Alerts is available.

**Who:** To use this feature, users need Industries Service Excellence, Rule Engine Design, and Access Record Alerts for Business Rules Engine permission sets.

**Why:** Using the Record Alert and Get User Data Business Rules Engine elements together shows record alerts only to users who have specified Salesforce profiles or roles.



**How:** In Setup, create object and field aliases for the objects and fields you want to trigger the expression set. In Business Rules Engine, create an expression set and add the Record Alert and Get User Data elements.

Add and configure a Record Alert Template in the expression set. Save and activate the expression set. Create a data source with the record type Business Rules Engine. Finally, create a record alert data source expression set definition to link your expression set and the object in your expression set.

SEE ALSO:

[Create Record Alerts Using Business Rules Engine \(can be outdated or unavailable during release preview\)](#)

## Show Alerts from Your External System

Your users don't have to leave Salesforce to see important notifications about their clients. Use the Data Consumption Framework with Record Alerts to show alerts in Salesforce that were generated in your external systems. Previously, you could show record alerts from your external system using only APEX files. Using Data Consumption Framework allows Salesforce to communicate with your external system asynchronously. Before Data Consumption Framework for record alerts, there wasn't a way to asynchronously retrieve alerts from your external system to show in Salesforce. The Data Consumption Framework integrates with MuleSoft, or you can use third-party middleware.

**Where:** This change applies to Lightning Experience in clouds where Record Alerts is available.

**Who:** To use this feature, users need IndustriesServiceExcellenceAddOn permission.

**Why:** Alerts generated in your external system are shown in the Alerts FlexCard component. Your users can quickly scan client records to see important notifications generated in Salesforce and your external system.

**How:** Set up Record Alerts and Data Consumption Framework. Using Data Consumption Framework, create a service type integration for Record Alerts. To show alerts generated using Data Consumption Framework on the Alerts FlexCard component, turn on **Retrieve and Display Alerts From Your External System**.

SEE ALSO:

[Show Alerts from Your External System \(can be outdated or unavailable during release preview\)](#)

## New Record Alerts Object

The new Record Alert Data Source Expression Set Definition object represents information about the data source for a record alert and the association with an expression set definition.

## Service Process Studio

Do more with Service Process Studio. Admins can clone service process definitions, group the service process data attributes into sections and organize these sections, and define lookup-type extended data attributes. Agents can view all the service process data attributes on the Case Details Lightning component.

### IN THIS SECTION:

#### [Save Time and Effort by Cloning Service Process Definitions](#)

Now you can create a service process definition quickly by cloning an existing definition. A cloned service process definition retains all the data attributes of the original definition. You can use the cloned definition as is, or modify it to suit your business needs.

#### [View All Data Attributes of a Service Process Easily with Case Details Lightning Component](#)

Eliminate navigating through multiple related records to find all service process data attributes. Add the Case Details Lightning component to the case record to provide a comprehensive view of all the data attributes in one component. The Case Details component renders data according to the sections and data attributes that you configured for a service process in Service Process Studio.

#### [Improve Readability by Grouping Related Data Attributes](#)

Create sections to group related data attributes of a service process. Grouping enables service agents to view a large set of data attributes in logical chunks on the Case Details Lightning component.

#### [Add Lookup Type Data Attributes to Quickly Access Related Records](#)

You can now define extended data attributes of type lookup for a service process. With lookup-type data attributes, you can maintain referential integrity by adding accurate references to related records. Also, when agents view the service process data attributes on the Case Details Lightning component, the lookup-type attributes show navigation links to related records.

#### [New and Changed Metadata APIs for Service Process Studio](#)

Access more data with these new and changed metadata APIs.

#### [Changed Objects for Service Process Studio](#)

Access more data with these changed objects.

#### [New and Changed Connect REST API Resources](#)

These resources are new or have changes.

## Save Time and Effort by Cloning Service Process Definitions

Now you can create a service process definition quickly by cloning an existing definition. A cloned service process definition retains all the data attributes of the original definition. You can use the cloned definition as is, or modify it to suit your business needs.

**How:** From the action menu of a service process definition, select **Clone**.

### SEE ALSO:

[Clone Service Process Definitions \(can be outdated or unavailable during release preview\)](#)

## View All Data Attributes of a Service Process Easily with Case Details Lightning Component

Eliminate navigating through multiple related records to find all service process data attributes. Add the Case Details Lightning component to the case record to provide a comprehensive view of all the data attributes in one component. The Case Details component renders data according to the sections and data attributes that you configured for a service process in Service Process Studio.

**How:** To add the Case Details Lightning component, go to the case record. From the Setup menu, click **Edit Page**, and then from the Standard components list, drag the **Case Details** Lightning component onto the record page.

SEE ALSO:

[Add the Case Details Lightning Component to the Case Record Page \(can be outdated or unavailable during release preview\)](#)

## Improve Readability by Grouping Related Data Attributes

Create sections to group related data attributes of a service process. Grouping enables service agents to view a large set of data attributes in logical chunks on the Case Details Lightning component.

**How:** To create a section in a service process definition, edit or create a service process definition. Go to Data Attributes and click **New Section**.

SEE ALSO:

[Group the Data Attributes into Sections \(can be outdated or unavailable during release preview\)](#)

## Add Lookup Type Data Attributes to Quickly Access Related Records

You can now define extended data attributes of type lookup for a service process. With lookup-type data attributes, you can maintain referential integrity by adding accurate references to related records. Also, when agents view the service process data attributes on the Case Details Lightning component, the lookup-type attributes show navigation links to related records.

**How:** In Data Attributes for the service process definition, create a data attribute with Attribute Type, **Extended** and Data Type, **Lookup**. Then set the Reference Object for the lookup.

SEE ALSO:

[Data Attributes \(can be outdated or unavailable during release preview\)](#)

## New and Changed Metadata APIs for Service Process Studio

Access more data with these new and changed metadata APIs.

### Group data attributes into sections

Use the new *SvcCatalogItemGroup* metadata API type.

### View the service catalog item group that's associated with an attribute

Use the new *SvcCatalogItemGroup* field on the *SvcCatalogItemAttribute* metadata API type.

## Changed Objects for Service Process Studio

Access more data with these changed objects.

### View the object record details associated with a Service Process Request

Use the new *ReferenceRecord* field on the *SvcCatalogReqExtDAttrVal* metadata API type.

### Update the service process attribute values associated with a Service Process Request

Make a PATCH request to the new

`/connect/service-excellence/service-catalog-request/${svcCatalogRequestId}` resource.

New request body: Service Process Request Input

New response body: Service Process Output

## New and Changed Connect REST API Resources

These resources are new or have changes.

### Service Process Studio

#### Update and retrieve the service process attribute values associated with a service process request

Make a PATCH request to the new

`/connect/service-excellence/service-catalog-request/${svcCatalogRequestId}` resource.

New request body: Service Process Request Input

New response body: Service Process

## 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

---

Use external actions as completion actions on Account Engagement assets. Account Engagement Optimizer is now generally available and includes monitoring for critical configuration issues. Plus, get retroactive activity data when prospects opt in to tracking.

#### IN THIS SECTION:

##### [General Enhancements](#)

Take your external actions further by adding them as completion actions. It's now easier to keep your business unit in good health with Account Engagement Optimizer. You also get retroactive first-touch attribution, a new and improved status site, and the ability to convert a dynamic list to a static list.

##### [APIs and Integrations](#)

Copy Engagement Studio programs to use in other Account Engagement business units, and get more control over your prospect database with the Bulk Action API. You also get new and updated fields in Account Engagement API version 5.

## General Enhancements

Take your external actions further by adding them as completion actions. It's now easier to keep your business unit in good health with Account Engagement Optimizer. You also get retroactive first-touch attribution, a new and improved status site, and the ability to convert a dynamic list to a static list.



## IN THIS SECTION:

[Trigger an External Action After a Prospect Engagement](#)

Now you can trigger an external action on any Account Engagement asset that has a completion action. For example, after a prospect completes a sign-up form, you can register the prospect for a webinar. You can send a text message after a prospect clicks a custom redirect link or send an alert to your sales team when a prospect visits a pricing page.

[Keep Your Account Engagement Business Unit Running Smoothly with Optimizer \(Generally Available\)](#)

Get performance information, recommendations, and required steps on the Optimizer page when you need them. The Optimizer feature, now generally available, also includes some changes since the last release. Diagnose and treat setup problems that are blocking your access to features with the Configuration Issues table. The Performance Improvement Measures table now includes good measures so that you can see what's working well in your business unit. Plus, the new Prospect Change Monitor helps you understand which features result in the most prospect changes for your business unit.

[Convert Unused Dynamic Lists to Static Lists](#)

Save processing power in your business unit by converting your old or unused dynamic lists to static lists. After you convert a dynamic list, you must manually add and remove prospects because the list no longer updates based on rule criteria. Select inactive or unused dynamic lists and use the table action dropdown menu to convert them to static. You can also convert individual lists from the record home.

[Use Data Cloud Segments in Account Engagement](#)

Connect Account Engagement with Data Cloud to harness customer data, improve segmentation, and increase personalization based on all interactions a customer has with your company. Use Account Engagement to nurture, send emails, and market to your Data Cloud customers.

[Use a New Opted Out Field Status](#)

Based on customer feedback, you can now use the most recently updated field value as a source of truth for the prospect Opted Out field. You also choose either Salesforce or Account Engagement to use as the system of record instead. Previously in the Spring '23 release, selecting a system of record was required. Business units created after October 18, 2023 use the Account Engagement value by default.

[Copy Assets Between Account Engagement Business Units More Easily](#)

Share marketing assets, such as custom fields, email templates, files, Engagement Studio programs, and custom redirects, across business units without manually recreating them. Work with your Salesforce admin to enable Salesforce Flow, which uses Account Engagement API v5 to query, read, and create assets as needed.

[Account Engagement Trust Site Is Moving](#)

The Account Engagement status site [trust.pardot.com](https://trust.pardot.com) is moving to [status.salesforce.com](https://status.salesforce.com) as of May 1, 2023. Add the new location to your list of opt-in subscriptions.

[Get First-Touch Attribution When Visitors Consent to Tracking](#)

Tracking cookies are now added retroactively after a prospect confirms consent. Previously, tracking cookies were added before a prospect clicked the consent banner and then deleted if they didn't consent.

[Email Report Print Count Fields Are Being Removed](#)

Litmus, the third-party vendor that provides print count information, is removing the Print Count and Print Forward fields from all Advanced Email Report metrics. Current and historical counts aren't retrievable by Account Engagement because the fields have been deprecated.

## Trigger an External Action After a Prospect Engagement

Now you can trigger an external action on any Account Engagement asset that has a completion action. For example, after a prospect completes a sign-up form, you can register the prospect for a webinar. You can send a text message after a prospect clicks a custom redirect link or send an alert to your sales team when a prospect visits a pricing page.

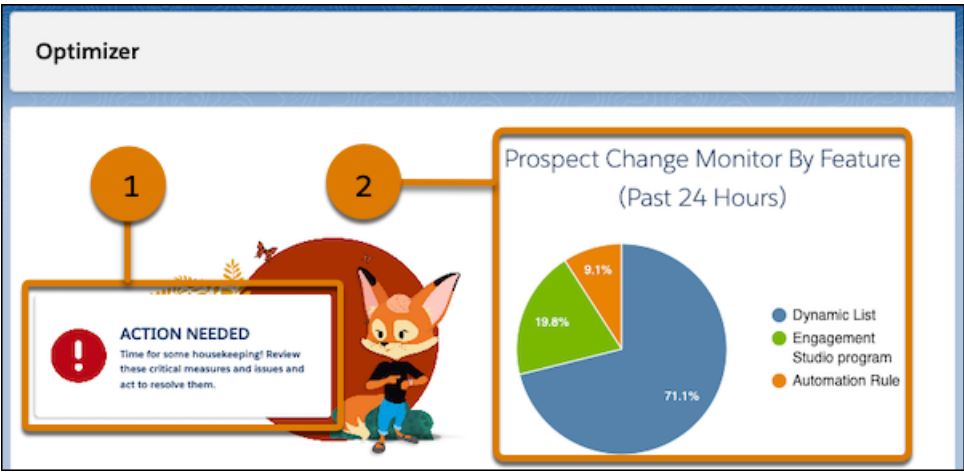
**Where:** This change applies to Account Engagement Growth, Plus, Advanced, and Premium editions.

## Keep Your Account Engagement Business Unit Running Smoothly with Optimizer (Generally Available)

Get performance information, recommendations, and required steps on the Optimizer page when you need them. The Optimizer feature, now generally available, also includes some changes since the last release. Diagnose and treat setup problems that are blocking your access to features with the Configuration Issues table. The Performance Improvement Measures table now includes good measures so that you can see what’s working well in your business unit. Plus, the new Prospect Change Monitor helps you understand which features result in the most prospect changes for your business unit.

**Where:** This change applies to all Account Engagement editions.

**How:** Access Optimizer in Account Engagement Settings and review the tables on the page. The top of the Optimizer page shows an overall status (1) and a pie chart summary of prospect changes by feature (2).



Review the tables and correct any critical configuration or performance issues. On Performance Improvements Measures table, use the filters to show all measures (1). Then, review measures that need attention and measures where your business unit is doing well (2).

Performance Improvement Measures ?				
View: <div>All</div>		Filter: <div></div>		
MEASURE	STATUS	FEATURE AREA	RECOMMENDATION	HISTORY
Total active automation rules and dynamic lists	Concerning	Automation Rules, Segmentation Rules, Dynamic Lists, Engagement Studio Programs, Salesforce Connector Prospect Syncing	You have a combined total of 945 active automation rules and dynamic lists. To maximize efficiency, keep this total under 1,000. Delete or pause automation rules you don't need. For unused dynamic lists, you can delete them or convert them to static lists. Start by reviewing <a href="#">inactive automation rules</a> and <a href="#">unused dynamic lists</a> .	
Inactive Engagement Studio programs	Good	Engagement Studio Programs	No action needed. You have 2 inactive Engagement Studio programs. In the future, pause or delete programs you're not using anymore.	

## IN THIS SECTION:

[Monitor the Source of Prospect Changes](#)

Find out which features are creating or updating prospect records in your business unit with the Prospect Change Monitor. Use the monitor to help you adjust your API integrations and automations that could be eating up processing power in your business unit. Access the Prospect Change Monitor from the Optimizer page in Account Engagement.

## SEE ALSO:

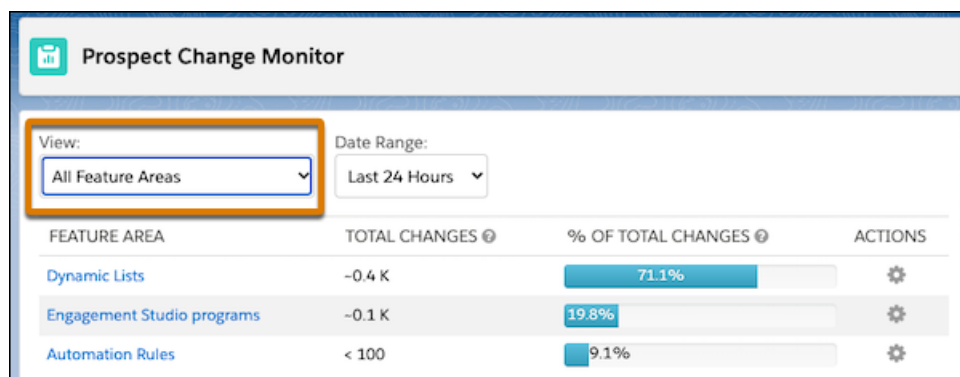
[Salesforce Help: Keep Your Business Unit Running Smoothly with Account Engagement Optimizer \(can be outdated or unavailable during release preview\)](#)

## Monitor the Source of Prospect Changes

Find out which features are creating or updating prospect records in your business unit with the Prospect Change Monitor. Use the monitor to help you adjust your API integrations and automations that could be eating up processing power in your business unit. Access the Prospect Change Monitor from the Optimizer page in Account Engagement.

**Where:** This change applies to all Account Engagement editions.

**How:** Click the pie chart for Prospect Change Monitor By Feature. Use the filters to view each feature area in depth.



## SEE ALSO:

[Salesforce Help: Monitor Features That Cause Prospect Changes in Account Engagement \(can be outdated or unavailable during release preview\)](#)

## Convert Unused Dynamic Lists to Static Lists

Save processing power in your business unit by converting your old or unused dynamic lists to static lists. After you convert a dynamic list, you must manually add and remove prospects because the list no longer updates based on rule criteria. Select inactive or unused dynamic lists and use the table action dropdown menu to convert them to static. You can also convert individual lists from the record home.

**Where:** This change applies to all Account Engagement editions.

## SEE ALSO:

[Salesforce Help: Convert Account Engagement Dynamic Lists to Static Lists \(can be outdated or unavailable during release preview\)](#)

## Use Data Cloud Segments in Account Engagement

Connect Account Engagement with Data Cloud to harness customer data, improve segmentation, and increase personalization based on all interactions a customer has with your company. Use Account Engagement to nurture, send emails, and market to your Data Cloud customers.

**Where:** This change applies to all Account Engagement editions.

## Use a New Opted Out Field Status

Based on customer feedback, you can now use the most recently updated field value as a source of truth for the prospect Opted Out field. You also choose either Salesforce or Account Engagement to use as the system of record instead. Previously in the Spring '23 release, selecting a system of record was required. Business units created after October 18, 2023 use the Account Engagement value by default.

**Where:** This change applies to all Account Engagement editions.

**How:** Edit the default prospect Opted Out field, and select an option under the Sync Behavior dropdown. After you make a selection, the option to use the most recently updated record is no longer available.

## Copy Assets Between Account Engagement Business Units More Easily

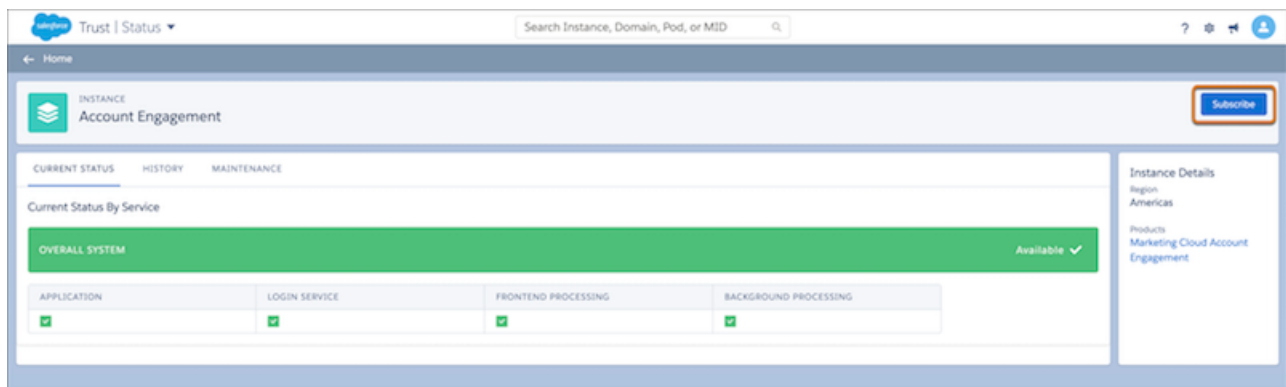
Share marketing assets, such as custom fields, email templates, files, Engagement Studio programs, and custom redirects, across business units without manually recreating them. Work with your Salesforce admin to enable Salesforce Flow, which uses Account Engagement API v5 to query, read, and create assets as needed.

**Where:** This change applies to Account Engagement Growth, Plus, Advanced, and Premium editions.

## Account Engagement Trust Site Is Moving

The Account Engagement status site [trust.pardot.com](https://trust.pardot.com) is moving to [status.salesforce.com](https://status.salesforce.com) as of May 1, 2023. Add the new location to your list of opt-in subscriptions.

**Where:** This change applies to all Account Engagement editions.



## Get First-Touch Attribution When Visitors Consent to Tracking

Tracking cookies are now added retroactively after a prospect confirms consent. Previously, tracking cookies were added before a prospect clicked the consent banner and then deleted if they didn't consent.

**Where:** This change applies to all Account Engagement editions.

## Email Report Print Count Fields Are Being Removed

Litmus, the third-party vendor that provides print count information, is removing the Print Count and Print Forward fields from all Advanced Email Report metrics. Current and historical counts aren't retrievable by Account Engagement because the fields have been deprecated.

**Where:** This change applies to Account Engagement Plus, Advanced, and Premium editions. Available for an additional cost in Growth edition.

## APIs and Integrations

Copy Engagement Studio programs to use in other Account Engagement business units, and get more control over your prospect database with the Bulk Action API. You also get new and updated fields in Account Engagement API version 5.

### IN THIS SECTION:

[Account Engagement API: New and Changed Items](#)

Access more of your data with new and updated objects for Account Engagement API version 5.

[The AddThis Connector Is Being Removed](#)

Because the AddThis service is discontinued, the AddThis connector for Account Engagement is no longer available as of June 1, 2023. The AddThis button will no longer be available in the email builder.

## Account Engagement API: New and Changed Items

Access more of your data with new and updated objects for Account Engagement API version 5.

### Updated Objects in Version 5

#### **Bulk Action API**

Manage active prospect database in bulk, and optimize performance by maintaining a clean database.

#### **Object Folder Mapping**

Retrieve all objects in a folder in one call, and get a link to the file.

#### **Enhanced Prospect Query**

Added support for querying by Email and Salesforce ID to simplify retrieving the Prospect ID.

#### **New Engagement Studio Program Endpoint**

Added support for Engagement Studio program endpoint.

#### **Import - Assign User ID or Owner ID**

Added support for assigning upon import via the User ID or Owner ID.

#### **V5 Permanent Deletion**

Added support to permanently delete prospects from within the recycle bin.

#### **Copy Account Engagement Business Unit Assets**

Copy email templates, files, Engagement Studio programs, and other assets from one business unit to another using Salesforce Flow.

## The AddThis Connector Is Being Removed

Because the AddThis service is discontinued, the AddThis connector for Account Engagement is no longer available as of June 1, 2023. The AddThis button will no longer be available in the email builder.

**Where:** This change applies to all Account Engagement editions.

# Mobile

Salesforce Mobile App Plus is now generally available. The operating system requirements for the Salesforce mobile app have changed. Mobile Publisher for Experience Cloud apps can now require app updates natively and with a 15-day grace period.

IN THIS SECTION:

[Salesforce Mobile App](#)

Salesforce Mobile App Plus combines mobile offline access, enhanced app security, and branding capabilities. Enable Dynamic Forms on Mobile (beta) to give your mobile users the same customized record-page experience as your desktop users. View your analytics collections on Salesforce Mobile Home.

[Mobile Publisher](#)

Mobile Publisher for Experience Cloud apps can now require app updates natively. Mobile Publisher for Experience Cloud app users have a 15-day grace period to update their apps.

[Briefcase Builder](#)

The Deleted field is no longer supported as a filter for selecting records.

## Salesforce Mobile App

Salesforce Mobile App Plus combines mobile offline access, enhanced app security, and branding capabilities. Enable Dynamic Forms on Mobile (beta) to give your mobile users the same customized record-page experience as your desktop users. View your analytics collections on Salesforce Mobile Home.

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 June 12, 2023.

Salesforce App Enhancements and Changes	Salesforce for Android	Salesforce for iOS	Set Up in the Full Site
<b>Browser and Operating System</b>			
<a href="#">Salesforce Mobile App Requirements Have Changed</a>	✓	✓	
<b>Data Access and Views</b>			

Salesforce App Enhancements and Changes	Salesforce for Android	Salesforce for iOS	Set Up in the Full Site
<a href="#">Access Your Analytics Collections on Salesforce Mobile</a>	✓	✓	
<b>Sales Features</b>			
<a href="#">See Recent Changes in Forecast Categories</a>	✓	✓	✓
<b>Productivity Features</b>			
<a href="#">Salesforce Mobile App Plus Is Generally Available</a>	✓	✓	✓
<b>Offline Access</b>			
<a href="#">Mobile Offline Is Generally Available</a>	✓	✓	✓
<a href="#">Offline App Onboarding Wizard Is Generally Available</a>	✓	✓	✓
<b>Access and Security</b>			
<a href="#">The Salesforce Mobile App Community License Access Retirement Is Paused</a>			
<a href="#">Salesforce Mobile App Version 228 Is Retired</a>			
<a href="#">Migrate Security Policies to the Mobile Security Setup UI</a>	✓	✓	✓
<b>Setup</b>			
<a href="#">Enable Dynamic Forms on Mobile (Beta)</a>	✓	✓	✓
<b>Miscellaneous Enhancements</b>			
<a href="#">New BarcodeScanner Features Available for the Salesforce Mobile App</a>	✓	✓	

## Salesforce Mobile App Requirements Have Changed

Salesforce revised the requirements for using the Salesforce mobile app for iOS and Android.

### Mobile Platform Requirements

The Salesforce mobile app is supported on phones and tablets that meet these mobile platform requirements.

#### Operating System and Version Requirements

Android 9.0 or later

iOS 15.0 or later

To allow for innovation and to keep Salesforce current in the rapidly evolving mobile market, minimum platform requirements are subject to change at the sole discretion of Salesforce, with or without advance notice.

#### SEE ALSO:

[Salesforce Help: Requirements for the Salesforce Mobile App \(can be outdated or unavailable during release preview\)](#)

## See Recent Changes in Forecast Categories

See week-over-week changes for each of the forecast categories so that you can adjust your sales strategies accordingly.

**Where:** This change applies to all versions of the Salesforce mobile app in Professional, Performance, and Developer editions and in Enterprise and Unlimited editions with the Sales Cloud.

SEE ALSO:

[See Recent Forecast Changes in the Salesforce Mobile App](#)

## Salesforce Mobile App Plus Is Generally Available

Salesforce Mobile App Plus consists of three features that enhance your Salesforce Mobile App experience. By combining mobile offline access, enhanced app security, and branding capabilities, Salesforce Mobile App Plus gives businesses a mobile platform to work securely from anywhere, even with little to no internet connectivity.

**Where:** This change applies to the Salesforce mobile app for iOS and Android on phone and tablets in all editions, except Database.com.

**When:** Use of enhanced app security and branding capabilities are currently available. Mobile offline access is generally available the week of June 12, 2023.

**Who:** Branding is available to orgs with the Salesforce Mobile App Plus license. Enhanced App Security is available to users with the Enforce Enhanced Mobile App Security user permission. Mobile Offline is available to users with the OfflineForMobilePlus user permission.

**Why:** Salesforce Mobile App Plus provides a unified place to consume three features, Mobile Offline, Enhanced Mobile Security, and Branding and App Management.

A Salesforce mobile platform supported offline solution solves a critical need for businesses that would rather rely on a first-party solution than build their own. Mobile Offline empowers users to get jobs done without worrying about network connectivity.

Enhanced Mobile Security provides companies with a native mobile application management (MAM) experience to add an additional layer of security to Salesforce mobile applications for businesses with additional security requirements.

With Branding & App Management, customers can fully brand their Salesforce Mobile App for iOS and Android, including the app icon, name, colors, and more. They can also list their customized app in the Apple and Google Play stores.

**How:** Once the license has been added to your org, you can assign user permissions for Mobile Offline and Enhanced App Security.

## Access Your Analytics Collections on Salesforce Mobile

Collections have now been added as a card on Salesforce Mobile Home. When you curate a collection of Lightning reports and dashboards, and CRM Analytics assets on your desktop, you can view it automatically on your mobile device.

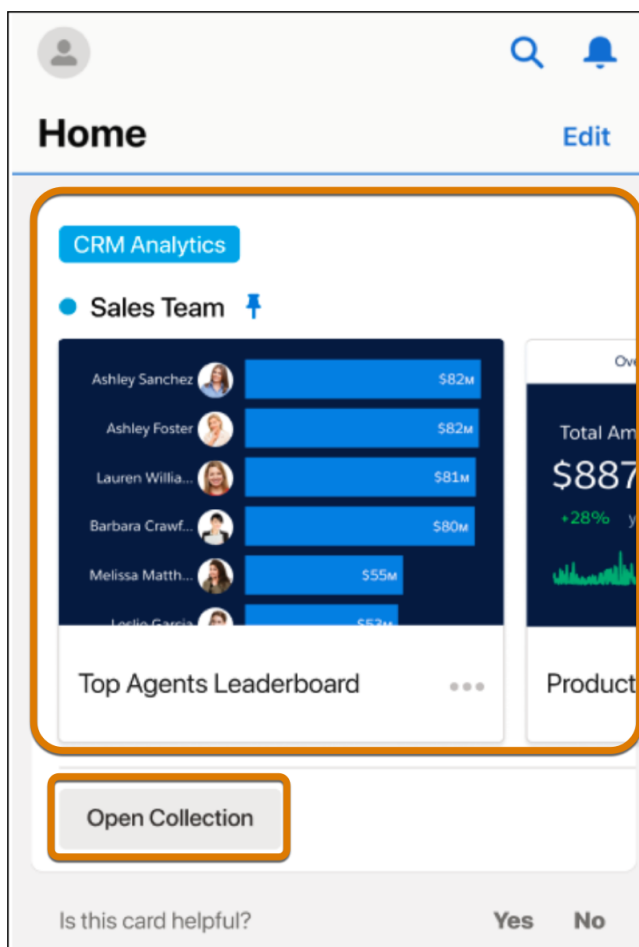
**Where:** This change applies to Lightning Experience and the Salesforce mobile app for iOS and Android in Professional, Developer, Enterprise, and Unlimited editions.

**Who:** A CRM Analytics license is required to access CRM Analytics assets.

**When:** Collections in Salesforce Mobile Home is available the week of June 12, 2023.

**How:** Open the Salesforce Mobile app. Tap **Open Collection**.





SEE ALSO:

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

## Mobile Offline Is Generally Available

Mobile Offline, available with Salesforce Mobile App Plus, gives users the ability to do their jobs from anywhere, including places with poor network connectivity. With Mobile Offline, Lightning web components that have been developed for offline use can display and update records while a mobile device is disconnected from the internet. When the device returns online, changes automatically synchronize back to the Salesforce service.

**Where:** This change applies to the Salesforce mobile app for iOS and Android on phone and tablets in all editions, except Database.com.

**When:** Mobile Offline is generally available the week of June 12, 2023.

**Who:** Mobile Offline is available in orgs with the Salesforce Mobile App Plus license and to users within that org who have the OfflineForMobilePlus user permission.

**Why:** A Salesforce mobile platform supported offline solution solves a critical need for businesses that would rather rely on a first-party solution than build their own.

**How:** Configure Salesforce objects, including custom objects, that are to be made available with Briefcase Builder. Next, the customer needs to build custom Lightning Web Components that are statically analyzable so that all the data needed to work offline can be

fetches and downloads on a mobile device. You can also curate customized landing pages when the users navigate to Mobile Offline to ensure users can access data relevant to their jobs.

SEE ALSO:

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

## Offline App Onboarding Wizard Is Generally Available

The Offline App Onboarding Wizard guides you with easy-to-follow prompts to configure the Offline Starter Kit project for the Salesforce Mobile App Plus offline experience.

**Where:** This change applies to the Salesforce mobile app for iOS and Android on phone and tablets in all editions, except Database.com.

**When:** Offline App Onboarding Wizard is generally available the week of June 26, 2023.

**Who:** Mobile Offline is available in orgs with the Salesforce Mobile App Plus license and to users within that org who have the OfflineForMobilePlus user permission.

**Why:** To make the offline development and set up process easier, we created a tool called the Offline App Onboarding Wizard.

**How:** Download the [Salesforce Offline App Onboarding Wizard Visual Studio Code Extension](#). Alternatively, if you're in Visual Studio Code, go to the Extensions (Shift-Command-X on Mac) and search for the Salesforce Offline Starter Kit Wizard and click **Install**.

## Migrate Security Policies to the Mobile Security Setup UI

This update improves the admin experience by moving all Enhanced Mobile App Security policies that were configured as Connected App custom attributes to the Mobile Security Setup UI. Now you can easily enable or edit security policies with clicks and avoid configuration errors.



**Note:** This update only applies to Connected App custom attributes beginning with `mobile.security` for the Salesforce mobile app.

**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.

**When:** Salesforce enforces this update in the Summer '23 release. To get the major release upgrade date for your instance, go to the Salesforce [Trust Status](#), search for your instance, and click the Maintenance tab.

**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**.

Go to the Connected App and use the **Migrate** option, which maps your current security policies to the Mobile Security Setup UI. Or you can enable setting security policies with the Mobile Security Setup UI. Review your policies and save.

**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](#)

**\* 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 \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Enable and Configure Mobile App Security Policies \(can be outdated or unavailable during release preview\)](#)

## Salesforce Mobile App Version 228 Is Retired

As of Summer '23, users can no longer log in to any Salesforce mobile app version below 230.000 on iOS and Android.

**Where:** This change applies to the Salesforce mobile app for iOS and Android on phones and tablets in all editions.

## SEE ALSO:

[Knowledge Article: Salesforce Mobile App Version 228 Retirement](#)

## The Salesforce Mobile App Community License Access Retirement Is Paused

Salesforce has decided to pause the previously communicated retirement of Community License users using the Salesforce Mobile App. There is currently no planned retirement timeline.

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

**Who:** This retirement announcement applies to all users with these licenses:

- Company Community License
- Customer Community
- Customer Community Plus
- Customer Portal
- High-Volume Portal User
- Lightning External Apps
- Lightning External Apps Plus

- Partner Community
- Partner Portal

SEE ALSO:

[Knowledge Article: Salesforce Mobile App Community License Access Retirement Paused](#)

## Enable Dynamic Forms on Mobile (Beta)

With Dynamic Forms, you have greater customization options on your record pages. Now, when you enable Dynamic Forms on Mobile (beta), your mobile users have the same customized experience your desktop users have.

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

[Give Your Mobile Users the Dynamic Forms Experience \(Beta\)](#)

## New BarcodeScanner Features Available for the Salesforce Mobile App

Scanning barcodes gets even easier! When you use BarcodeScanner in the Salesforce mobile app, you now have the option to enable scanning of multiple barcodes simultaneously. This much-requested feature makes processing large quantities of barcodes a breeze! Additionally, the new `scan()` function combines three existing API functions into one, allowing for simpler scanning code.

**Where:** This feature is available in Salesforce mobile app implementations of BarcodeScanner.



**Note:** Building barcode-scanning functions using the BarcodeScanner API only works in the mobile application, not the web version on mobile or desktop.

SEE ALSO:

[Scan More Barcodes at Once, Save Time—Improved Bulk Scanning with BarcodeScanner](#)

[New scan\(\) Function for BarcodeScanner Does It All](#)

## Mobile Publisher

Mobile Publisher for Experience Cloud apps can now require app updates natively. Mobile Publisher for Experience Cloud app users have a 15-day grace period to update their apps.

IN THIS SECTION:

[Highlight Android Device Runtime Permissions With New In-App Request Workflow](#)

Mobile Publisher for Experience Cloud Android apps now show users two prompts for granting your app permissions to device capabilities that Google defines as runtime permissions. In the first prompt, your app displays the permission description that you provide. Called a prominent disclosure, this description must clearly explain how your app uses the device capability, what user data is accessed, and how the data is used. If the user chooses to continue, the second prompt is the system-native dialog that requests permission to the device capability.

### [Link to Your Experience Cloud App's Privacy Policy From the Login Page](#)

Mobile Publisher for Experience Cloud Android apps now support a link to your privacy policy from your app's login screen. You can set the privacy policy link to open in an in-app browser or an external browser. Google requires that links to your privacy policy are accessible from within your app. We recommend that you add links to the privacy policy on your app's login and registration page and in a page footer shown on every app page.

### [Get Native Updates for Experience Cloud Apps](#)

Mobile Publisher for Experience Cloud apps now offer required app updates natively. And when your Experience Cloud app users tap the prompt to update their app, they go directly to your app's page in the Apple App Store or in Google Play. In previous versions, app users go to the Apple App Store or Google Play storefronts to search for the app's page.

### [Require Experience Cloud App Users to Update Their Apps After 15 Days](#)

Mobile Publisher for Experience Cloud app users now have a 15-day grace period to update their apps after you change the Minimum App Version in your app's settings. If you deselect the Require users to update option in your Mobile Publisher settings in Experience Builder, your app users have Update Later or Update buttons available in their app update prompt for 15 days. After 15 days, the update prompt shows only the Update button. If you keep the Require users to update option selected, the update prompt shows only the Update button.

### [Delete the Mobile Publisher App Update Component from Your Sites](#)

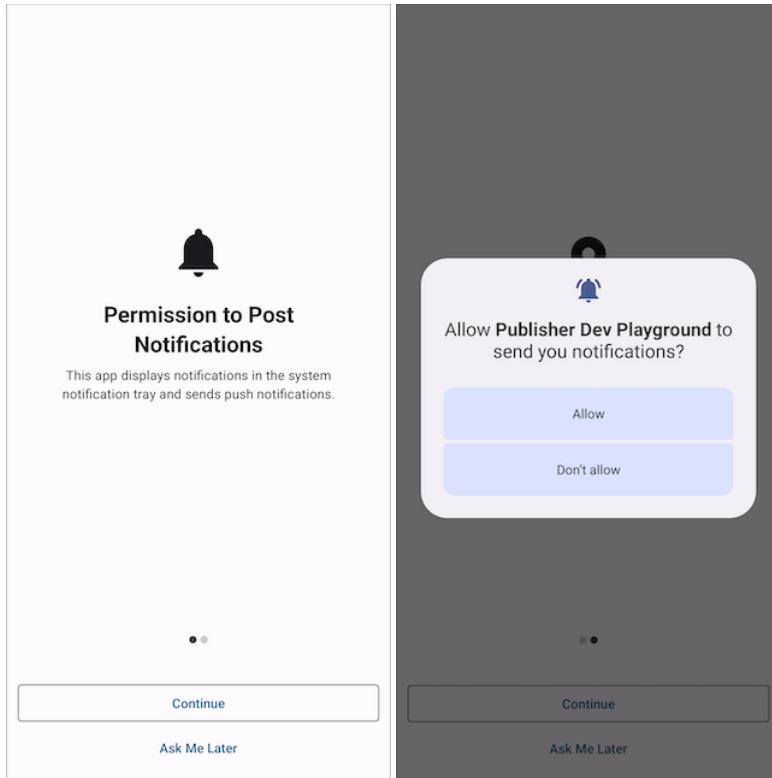
The AppExchange package that provides the Mobile Publisher App Update component will be delisted from AppExchange on October 1, 2023. You can now use the Minimum App Version settings in Experience Builder to urge or force users to upgrade their apps.

### [New BarcodeScanner Features Available for Mobile Publisher Applications](#)

Scanning barcodes gets even easier! When you use BarcodeScanner in your Mobile Publisher application, you now have the option to enable scanning of multiple barcodes simultaneously. This much-requested feature makes processing large quantities of barcodes a breeze! Additionally, the new `scan()` function combines three existing API functions into one, allowing for simpler scanning code.

## Highlight Android Device Runtime Permissions With New In-App Request Workflow

Mobile Publisher for Experience Cloud Android apps now show users two prompts for granting your app permissions to device capabilities that Google defines as runtime permissions. In the first prompt, your app displays the permission description that you provide. Called a prominent disclosure, this description must clearly explain how your app uses the device capability, what user data is accessed, and how the data is used. If the user chooses to continue, the second prompt is the system-native dialog that requests permission to the device capability.



**Where:** This change applies to:

- Mobile Publisher for Experience Cloud Android app versions 11.4 and later.
- Apps created with Mobile Publisher for your Experience Cloud [Aura and LWR sites](#) in Enterprise, Performance, Unlimited, and Developer editions.

**How:** To add or update a permission description to your app, open your app's Mobile Publisher project in Setup. Then, in the Android App Permissions for Device Capabilities section, find the permission that you want to update and click **Edit Permission Description**.

SEE ALSO:

[Permissions on Android: Runtime permissions](#)

[Salesforce Help: Enable App Permissions for Device Capabilities \(can be outdated or unavailable during release preview\)](#)

[Play Console Help: Best practices for prominent disclosure and consent](#)

## Link to Your Experience Cloud App's Privacy Policy From the Login Page

Mobile Publisher for Experience Cloud Android apps now support a link to your privacy policy from your app's login screen. You can set the privacy policy link to open in an in-app browser or an external browser. Google requires that links to your privacy policy are accessible from within your app. We recommend that you add links to the privacy policy on your app's login and registration page and in a page footer shown on every app page.

**Where:** This change applies to:

- Mobile Publisher for Experience Cloud Android app versions 11.4 and later.
- Apps created with Mobile Publisher for your Experience Cloud [Aura and LWR sites](#) in Enterprise, Performance, Unlimited, and Developer editions.

**How:** To add a link to your app's privacy policy from the login screen:

- In Experience Builder, update your Experience Cloud site to add the privacy policy link on your app's login page.
- In your app's Setup for Mobile Publisher project, enter the privacy policy link in the In-App Browser URLs field or the External Browser URLs field in the URL Management section.

SEE ALSO:

[Salesforce Help: Set Up Your Fully Managed Android App for Google's Privacy Policy Requirements \(can be outdated or unavailable during release preview\)](#)

[Play Console Help: Data safety section and Privacy Policy](#)

## Get Native Updates for Experience Cloud Apps

Mobile Publisher for Experience Cloud apps now offer required app updates natively. And when your Experience Cloud app users tap the prompt to update their app, they go directly to your app's page in the Apple App Store or in Google Play. In previous versions, app users go to the Apple App Store or Google Play storefronts to search for the app's page.

**Where:** This change applies to:

- Mobile Publisher for Experience Cloud apps in iOS and Android app versions 11.2 and later.
- Apps created with Mobile Publisher for your Experience Cloud [Aura and LWR sites](#) in Enterprise, Performance, Unlimited, and Developer editions.

**How:** To configure App Version Update settings in the Experience Builder Settings area, select **Mobile Publisher**, and then select **App Settings**.

SEE ALSO:

[Remove the Mobile Publisher App Update Component from Your Sites](#)

[Salesforce Help: Urge or Require Users to Update to the Latest Mobile Publisher App Version \(can be outdated or unavailable during release preview\)](#)

## Require Experience Cloud App Users to Update Their Apps After 15 Days

Mobile Publisher for Experience Cloud app users now have a 15-day grace period to update their apps after you change the Minimum App Version in your app's settings. If you deselect the Require users to update option in your Mobile Publisher settings in Experience Builder, your app users have Update Later or Update buttons available in their app update prompt for 15 days. After 15 days, the update prompt shows only the Update button. If you keep the Require users to update option selected, the update prompt shows only the Update button.

**Where:** This change applies to:

- Mobile Publisher for Experience Cloud apps in iOS and Android app versions 11.2 and later.
- Apps created with Mobile Publisher for your Experience Cloud [Aura and LWR sites](#) in Enterprise, Performance, Unlimited, and Developer editions.

**How:** To configure App Version Update settings in the Experience Builder Settings area, select **Mobile Publisher**, and then select **App Settings**.

SEE ALSO:

[Salesforce Help: Urge or Require Users to Update to the Latest Mobile Publisher App Version \(can be outdated or unavailable during release preview\)](#)

## Delete the Mobile Publisher App Update Component from Your Sites

The AppExchange package that provides the Mobile Publisher App Update component will be delisted from AppExchange on October 1, 2023. You can now use the Minimum App Version settings in Experience Builder to urge or force users to upgrade their apps.

**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:

[Remove the Mobile Publisher App Update Component from Your Sites](#)

## New BarcodeScanner Features Available for Mobile Publisher Applications

Scanning barcodes gets even easier! When you use BarcodeScanner in your Mobile Publisher application, you now have the option to enable scanning of multiple barcodes simultaneously. This much-requested feature makes processing large quantities of barcodes a breeze! Additionally, the new `scan()` function combines three existing API functions into one, allowing for simpler scanning code.

**Where:** This feature is available in both Mobile Publisher for Salesforce App and Mobile Publisher for Experience Cloud implementations of BarcodeScanner.



**Note:** Building barcode-scanning functions using the BarcodeScanner API only works in the mobile application, not the web version on mobile or desktop.

SEE ALSO:

[Scan More Barcodes at Once, Save Time—Improved Bulk Scanning with BarcodeScanner](#)

[New scan\(\) Function for BarcodeScanner Does It All](#)

## Briefcase Builder

The Deleted field is no longer supported as a filter for selecting records.

IN THIS SECTION:

[Deleted Field Is Deprecated as a Briefcase Filter](#)

The Deleted field, used to identify deleted records, is no longer supported as a filter for records included in a briefcase. Briefcases that currently use the Deleted field as a filter continue to operate as normal when priming records and in Run As User testing. However, when you edit a briefcase that uses the Deleted field, you receive an error. Additionally, the Deleted field is no longer available as an option for new briefcase filters.

### Deleted Field Is Deprecated as a Briefcase Filter

The Deleted field, used to identify deleted records, is no longer supported as a filter for records included in a briefcase. Briefcases that currently use the Deleted field as a filter continue to operate as normal when priming records and in Run As User testing. However, when you edit a briefcase that uses the Deleted field, you receive an error. Additionally, the Deleted field is no longer available as an option for new briefcase filters.

**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.



## Revenue

---

Bundle your products and services in Subscription Management, and decrease subscription quantities. Price and bill annually, configure more discounts, and turn off invoicing and payment features in Subscription Management. Create quote templates faster in Salesforce CPQ Plus.

### IN THIS SECTION:

#### [Subscription Management](#)

Sell bundled products and services. Decrease subscription quantities. Price your subscriptions annually, and bill your customers annually, too. Configure more discounts, and turn off invoicing and payment features in Subscription Management.

#### [Salesforce CPQ](#)

Quote templates are now easier to create in CPQ Plus.

## Subscription Management

Sell bundled products and services. Decrease subscription quantities. Price your subscriptions annually, and bill your customers annually, too. Configure more discounts, and turn off invoicing and payment features in Subscription Management.



**Note:** To use Subscription Management to administer storefronts in Experience Cloud sites, a Subscription Management license, an Experience Cloud license, and the Subscription Management User permission are required.

### IN THIS SECTION:

#### [Sell Bundled Products and Services](#)

Build a bundle of goods and services so that you can sell them together. Include products sold once and items that you sell by subscription—for example, an appliance with accessories and a warranty. Nest a bundle as a line item inside another bundle. Specify whether the cost of an item in a bundle is included in the bundle's price or available for an extra cost. Update or copy a bundle and track it through quoting, orders, and fulfillment. Renew or cancel sales that include bundles. You can also display bundled line items to customers in your storefront.

#### [Decrease the Quantity of a Subscription](#)

Sales operations reps can now decrease subscription quantities. Previously, if a customer wanted to decrease the quantity of a subscription, a rep had to cancel it and re-create the order, which threw off sales reporting.

#### [Price Product Subscriptions Annually](#)

When you're using Product Selling Models in Subscription Management, pricing options now include annual with a term of one and continue to include monthly with a term of one. The ability for Subscription Management admins to structure the pricing for purchased products allows you to fine-tune the way you'd like to price, pay, and account for your products.

#### [Bill Your Customers Annually](#)

Annual billing frequency is now supported out of the box, so you don't need a custom solution to solve a common business use case. Previously, only monthly billing terms were supported in Subscription Management.

#### [Configure Discounts for Subscriptions with Longer Terms](#)

Increase sales and lengthen your customer relationships with price adjustments for longer subscriptions; for example, a 20% discount for subscriptions longer than three years. Previously, you could configure price adjustments only for increased quantity. Create a price adjustment schedule with the type termed, configure a discount for each tier, and then associate the price adjustment schedule to a product's price book entry. By configuring a price adjustment in the pricing catalog once, rather than manually with each order, you ensure customers see consistent prices across all sales channels.

### [Use Subscription Management Without Its Invoicing and Payment Features](#)

If you don't use Subscription Management for billing, you can now use it without creating billing schedules for invoicing. Previously, Subscription Management generated billing schedules and invoices whenever orders were activated. With the Suppress Subscription Management Billing Functionality setting, on order activation, Subscription Management leaves the Billing Frequency field blank and doesn't generate billing schedules. Existing billing schedules continue to generate invoices.

### [Get Insightful Details at Every Step of Quote Calculation](#)

Get an enhanced view of your progress in the Quote Generation lifecycle through the additional statuses in the Quote record's CalculationStatus field.

## Sell Bundled Products and Services

Build a bundle of goods and services so that you can sell them together. Include products sold once and items that you sell by subscription—for example, an appliance with accessories and a warranty. Nest a bundle as a line item inside another bundle. Specify whether the cost of an item in a bundle is included in the bundle's price or available for an extra cost. Update or copy a bundle and track it through quoting, orders, and fulfillment. Renew or cancel sales that include bundles. You can also display bundled line items to customers in your storefront.

**Where:** This change applies to the Sales Cloud and Service Cloud in Lightning Experience in Enterprise, Unlimited, and Developer editions with a Subscription Management license. This change also applies to [Aura, LWR, and Visualforce sites](#) accessed through Lightning Experience in the same editions.

**Who:** Bundles are available with the SubscriptionManagementProductAndPricingAdmin permission set group.

## Decrease the Quantity of a Subscription

Sales operations reps can now decrease subscription quantities. Previously, if a customer wanted to decrease the quantity of a subscription, a rep had to cancel it and re-create the order, which threw off sales reporting.

**Where:** This change applies to the Sales Cloud and Service Cloud in Lightning Experience in Enterprise, Unlimited, and Developer editions with a Subscription Management license. This change also applies to [Aura, LWR, and Visualforce sites](#) accessed through Lightning Experience in the same editions.

**Who:** This feature is available with the SubscriptionManagementSalesOperationsRep permission set group or the Subscription Management: Decrease Quantity permission set.

## Price Product Subscriptions Annually

When you're using Product Selling Models in Subscription Management, pricing options now include annual with a term of one and continue to include monthly with a term of one. The ability for Subscription Management admins to structure the pricing for purchased products allows you to fine-tune the way you'd like to price, pay, and account for your products.

**Where:** This change applies to the Sales Cloud and Service Cloud in Lightning Experience in Enterprise, Unlimited, and Developer editions with a Subscription Management license. This change also applies to [Aura, LWR, and Visualforce sites](#) accessed through Lightning Experience in the same editions.

**Who:** Annual Pricing is available with the SubscriptionManagementProductAndPricingAdmin permission set group, or the Subscription Management: CalculatePrices API permission set and the Subscription Management: ProductAndPriceConfiguration API permission set.

## Bill Your Customers Annually

Annual billing frequency is now supported out of the box, so you don't need a custom solution to solve a common business use case. Previously, only monthly billing terms were supported in Subscription Management.

**Where:** This change applies to the Sales Cloud and Service Cloud in Lightning Experience in Enterprise, Unlimited, and Developer editions with a Subscription Management license. This change also applies to [Aura, LWR, and Visualforce sites](#) accessed through Lightning Experience in the same editions.

**Who:** Users need the SubscriptionManagementProductAndPricingAdmin permission set group, the Subscription Management CalculatePrices API permission set, or the Subscription Management ProductAndPriceConfiguration API permission set. Users also need either the SubscriptionManagementBillingAdmin permission set group or the SubscriptionManagementBillingOperations permission set group.

## Configure Discounts for Subscriptions with Longer Terms

Increase sales and lengthen your customer relationships with price adjustments for longer subscriptions; for example, a 20% discount for subscriptions longer than three years. Previously, you could configure price adjustments only for increased quantity. Create a price adjustment schedule with the type termed, configure a discount for each tier, and then associate the price adjustment schedule to a product's price book entry. By configuring a price adjustment in the pricing catalog once, rather than manually with each order, you ensure customers see consistent prices across all sales channels.

**Where:** This change applies to the Sales Cloud and Service Cloud in Lightning Experience in Enterprise, Unlimited, and Developer editions with a Subscription Management license. This change also applies to [Aura, LWR, and Visualforce sites](#) accessed through Lightning Experience in the same editions.

## Use Subscription Management Without Its Invoicing and Payment Features

If you don't use Subscription Management for billing, you can now use it without creating billing schedules for invoicing. Previously, Subscription Management generated billing schedules and invoices whenever orders were activated. With the Suppress Subscription Management Billing Functionality setting, on order activation, Subscription Management leaves the Billing Frequency field blank and doesn't generate billing schedules. Existing billing schedules continue to generate invoices.

**Where:** This change applies to the Sales Cloud and Service Cloud in Lightning Experience in Enterprise, Unlimited, and Developer editions with a Subscription Management license. This change also applies to [Aura, LWR, and Visualforce sites](#) accessed through Lightning Experience in the same editions.

## Get Insightful Details at Every Step of Quote Calculation

Get an enhanced view of your progress in the Quote Generation lifecycle through the additional statuses in the Quote record's CalculationStatus field.

**Where:** This change applies to Lightning Experience and Salesforce Classic in Professional, Enterprise, Performance, Unlimited, and Developer editions where Subscription Management is enabled.

**Who:** Users must have the SubscriptionManagementSalesRep Permission Set Group.

**Why:** The changes in Quote Calculation statuses.

- Persist In Progress: Saving of quote is initiated.
- Completed Without Pricing: Quote is saved in the database without pricing.
- Persist Failed: Unable to save the quote in the database.
- Price Calculation Waiting: Pricing calculation is waiting to be processed.
- Price Calculation In Progress: Quote's pricing is in progress.
- Completed With Pricing: Pricing is calculated and updated on quote.
- Price Calculation Failed: Unable to save pricing information in the database.
- Completed with Tax: Tax is calculated and updated to quote.

 **Note:** The Tax Calculation Success status has been retired.

## Salesforce CPQ

Quote templates are now easier to create in CPQ Plus.

### IN THIS SECTION:

#### [Create Quote Templates Faster Using OmniStudio Document Generation](#)

In Salesforce CPQ Plus, it's now easier to create templates that your reps can use to build quotes for your customers. Create a Microsoft Word (.docx) file with the language and formatting you want, drop in tokens, upload the file, and map tokens to Salesforce fields. Activate this template and it's ready for your sales reps to use. If they like, reps can convert their documents to PDFs.

## Create Quote Templates Faster Using OmniStudio Document Generation

In Salesforce CPQ Plus, it's now easier to create templates that your reps can use to build quotes for your customers. Create a Microsoft Word (.docx) file with the language and formatting you want, drop in tokens, upload the file, and map tokens to Salesforce fields. Activate this template and it's ready for your sales reps to use. If they like, reps can convert their documents to PDFs.

**Where:** This change applies to Lightning Experience and Salesforce Classic in Salesforce CPQ Plus.

### SEE ALSO:

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

## Sales

---

Sales teams can do their jobs faster and more effectively with these new products and feature enhancements. Allocate revenue at a more granular level for complex sales deals with opportunity product splits, and use opportunity product splits in reports and forecasts. Manage the timing of cadence steps and see cadence usage data in Sales Engagement. Share call transcripts, insights, and action items with more users in Einstein Conversation Insights, which now support more languages and voice providers. Arm your sales teams with key information from the Sales Rep Command Center in Revenue Intelligence. And get more insights into sales forecasts with charts and external data in custom columns.

### IN THIS SECTION:

#### [Sales Basics](#)

Coordinate opportunity revenue across your sales team with opportunity product splits, and see how multiple products and team members fit into complex sales deals without leaving the opportunity record. See data about opportunity product splits in reports and forecasts. Sales reps can save time by accessing their calendar in a new tab and other calendar enhancements.

#### [Sales Engagement](#)

Manage cadence step timing more easily, let users control the timing of cadence task assignment, repeat steps in quick cadences, and see cadence usage data. Let managers create automated actions, search for items in the To Do List, and manage work items from flows in the To Do List.

### Einstein Conversation Insights

Your teams can now use Einstein Conversation Insights with more voice recording providers, including Dialpad, RingCentral, Aircall, and Amazon Connect. Einstein Conversation Insights also supports over a dozen languages and several different dialects, and enhanced reporting features are available for everyone. Einstein Conversation Insights users are also prompted to turn on the speaker separation feature to help with the creation of transcripts and call insights.

### Revenue Intelligence

Try the new Sales Rep Command Center, which is laser-focused on providing your reps with key information. Identify potential sales using the Product Whitespace feature in Einstein Account Management. Understand your sales stages and identify bottlenecks using the Sales Stage analysis tool in Revenue Insights. Access your Revenue Insights dashboard directly from your mobile devices.

### Pipeline Inspection

View the deals and pipelines of more users and teams, including opportunity teams and sales team members in other branches of the role hierarchy. Edit more fields inline in Pipeline Inspection views. Get Pipeline Inspection in Enterprise Edition without purchasing an add-on license for it. And in orgs created in Summer '23 and later, Pipeline Inspection is enabled by default.

### Collaborative Forecasts

Assess the health of your forecasts with built-in charts. Make decisions with all the data you need in one place with referenced data in a custom column on the forecasts page. And increase visibility into split revenue for complex opportunities that are managed using opportunity product splits.

### Enablement for Sales Teams

Jump-start your sales teams with all the product and process knowledge needed to quickly open opportunities, close deals, and help achieve your company's revenue outcomes. New capabilities for building, assigning, and managing programs help your Enablement teams deliver more robust, timely, and job-specific resources for your sales teams in their flow of work.

### Collaborate in Real Time with PRM for Slack App (Generally Available)

Bring internal teams and partners into one partner channel for streamlined collaboration and communications. Access, update and share records, and automate vital business processes, all within Slack. Partner Relationship Management (PRM) for Slack connects your sales teams, partners, and important data through partner portals so you can scale productivity and streamline communication.

### Sales Performance Management

Put the fun in sales planning when you collaborate among stakeholders at every stage in a central location with Sales Planning. Load data-intensive alignments quickly within Territory Planning. Engage prospects as a team using Enterprise Territory Management. And visualize utility service lines in Salesforce Maps.

### Sales Cloud Einstein

Let Einstein GPT draft sales emails from a sales rep's inbox or anywhere in Salesforce. Monitor changes to Einstein Forecasting predictions with a new chart that shows a prediction trend line across periods. Get ready to bid farewell to Account Insights and Opportunity Insights, which are being retired.

### Integration with Other Products

Updates to Einstein Activity Capture resolve connected account issues, simplify your setup experience, and track email and event updates. Use the Salesforce Chrome extension to work with records and the To Do List, and view engagement alerts.

### Salesforce Meetings

Align everyone before a meeting starts by showing them valuable information about prospects and customers with Meeting Digest. Ensure that customers book meetings with you only when you're available. And get ready for Meeting Studio retirement on August 1, 2023.

### Email Experience

Your users can do their jobs faster and more efficiently by sending a meeting request with one click from the dynamic activity composer. In Lightning Experience, they can easily propose three upcoming meeting times. Control who can use organization-wide email addresses. And explore expanded ways to verify the identity of email senders.

[Salesforce Inbox](#)

Check out the latest improvements to Salesforce Inbox.

## Sales Basics

Coordinate opportunity revenue across your sales team with opportunity product splits, and see how multiple products and team members fit into complex sales deals without leaving the opportunity record. See data about opportunity product splits in reports and forecasts. Sales reps can save time by accessing their calendar in a new tab and other calendar enhancements.

### IN THIS SECTION:

[Opportunities](#)

Use opportunity product splits to coordinate opportunity revenue across your sales team. Get reports to track opportunity product splits. And create forecasts based on opportunity product splits.

[Quotes](#)

Sales reps no longer have to follow the opportunity-to-quote flow previously required.

[Calendar](#)

Save time by creating events directly from the calendar grid in availability view. Scroll less and see more of your calendar area by collapsing calendar user lists. Get a clearer overview of your schedule with up to 500 events in your calendar. And get to your calendar with one click in the dynamic activity composer.

[Encourage Repeat Orders Using a Commerce Reorder Portal](#)

Simplify the reorder process with a Commerce Reorder Portal. When you integrate this portal with Sales, reps can invite a buyer to the portal to view past orders, modify quantities, place new orders, and view order statuses.

## Opportunities

Use opportunity product splits to coordinate opportunity revenue across your sales team. Get reports to track opportunity product splits. And create forecasts based on opportunity product splits.

### IN THIS SECTION:

[Split Revenue by Product Mix with Opportunity Product Splits \(Generally Available\)](#)

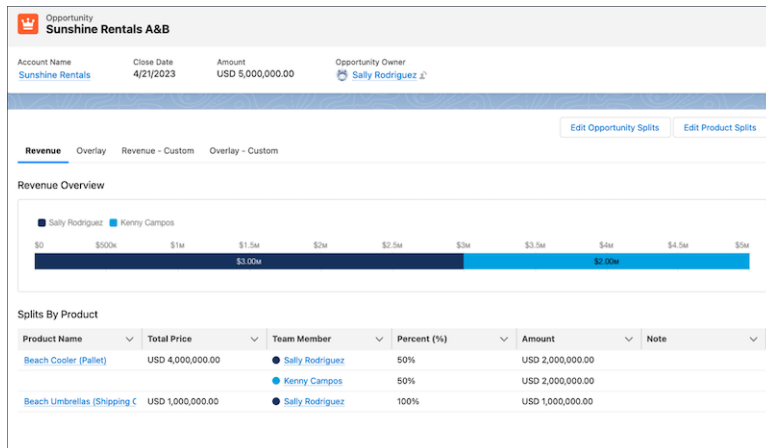
Use opportunity product splits to allocate revenue at a more granular level to team members who collaborate on complex opportunities. Without leaving the opportunity record, teams can see how multiple products and each team member fits into a sales motion. And with opportunity product splits reports, team members can track all of the opportunities they contribute to.

### Split Revenue by Product Mix with Opportunity Product Splits (Generally Available)

Use opportunity product splits to allocate revenue at a more granular level to team members who collaborate on complex opportunities. Without leaving the opportunity record, teams can see how multiple products and each team member fits into a sales motion. And with opportunity product splits reports, team members can track all of the opportunities they contribute to.

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

**Why:** Product splits are automatically rolled up to the opportunity split level, so each team member can see their portion of the entire deal.



**How:** Make sure opportunity splits is enabled on the Opportunity Splits page in Setup. Users who have access to opportunity splits also have access to opportunity product splits.

To set up opportunity product splits, in Split Types Setup, edit Split Types and include product splits on the opportunity split types that you want.

To show product splits on your opportunity record page, add the Opportunity Splits component. For instructions, see [Create and Configure Lightning Experience Record Pages](#).

## IN THIS SECTION:

### [Get Reports of Opportunities with Opportunity Product Splits](#)

Sales teams can track product splits and rollups to opportunity split revenue with standard reports, giving them visibility to the contribution team members make to the deals they support. The reports also show how product splits data reflect on compensation for reps and on individual and team forecasts.

### [See Opportunity Product Splits in Forecasts](#)

Now sales teams can create forecasts based on opportunities with opportunity product splits, so they can project sales based on the deals they support. Revenue for opportunity team members' product splits is reflected in Collaborative Forecasts when a forecast type is created based on the Opportunity Product Split object. Previously, you could forecast on opportunity splits.

## SEE ALSO:

[Salesforce Help: Set Up Opportunity Splits \(can be outdated or unavailable during release preview\)](#)

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

[Salesforce Help: Guidelines for Using Opportunity Splits and Opportunity Product Splits \(can be outdated or unavailable during release preview\)](#)

## Get Reports of Opportunities with Opportunity Product Splits

Sales teams can track product splits and rollups to opportunity split revenue with standard reports, giving them visibility to the contribution team members make to the deals they support. The reports also show how product splits data reflect on compensation for reps and on individual and team forecasts.

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

**Why:** Use the Opportunities with Opportunity and Product Splits report to show a list of opportunities with product split and opportunity split amounts and percentages. Sales teams get visibility to the opportunities that they own and the opportunities that they support in one report.

Report: Opportunities with Opportunity and Product Splits

Opp with Opp and Prod Splits

Total Records21

Total Split Total PriceUSD 298,132.00

User	Product Name		Chicken Dog	Churro	Hot Dog	iMac	Pizza	Soda	Total
<input type="checkbox"/> Admin User	Sum of Split Total Price	USD 0.00	USD 11,862.50	USD 165.00	USD 125.00	USD 202,995.00	USD 36,930.25	USD 24,584.25	USD 276,662.00
	Record Count	2	3	1	1	2	3	3	15
<input type="checkbox"/> Another Standard	Sum of Split Total Price	USD 0.00	USD 13,500.00	USD 0.00	USD 2,220.00	USD 0.00	USD 0.00	USD 0.00	USD 15,720.00
	Record Count	0	2	0	1	0	0	0	3
<input type="checkbox"/> Rachna Rachna Singh	Sum of Split Total Price	USD 0.00	USD 2,812.50	USD 0.00	USD 125.00	USD 0.00	USD 0.00	USD 0.00	USD 2,937.50
	Record Count	0	1	0	1	0	0	0	2
<input type="checkbox"/> stan standard	Sum of Split Total Price	USD 0.00	USD 2,812.50	USD 0.00	USD 0.00	USD 0.00	USD 0.00	USD 0.00	USD 2,812.50
	Record Count	0	1	0	0	0	0	0	1
Total	Sum of Split Total Price	USD 0.00	USD 30,987.50	USD 165.00	USD 2,470.00	USD 202,995.00	USD 36,930.25	USD 24,584.25	USD 298,132.00
	Record Count	2	7	1	3	2	3	3	21

Details (21 Rows)

Click an intersection in the table above to filter details.

	Opportunity Owner	Opportunity Name	Is Product Split	Percent (%)	Amount Renamed	Total Price	Split Total Price
1	Admin User	Testtest	<input type="checkbox"/>	100.00%	-	-	-
2	Admin User	test	<input type="checkbox"/>	100.00%	-	-	-
3	Admin User	First of Many test	<input checked="" type="checkbox"/>	25.00%	USD 275,805.50	USD 11,250.00	USD 2,812.50
4	Admin User	Super Basic Test	<input type="checkbox"/>	100.00%	USD 644.00	USD 275.00	USD 275.00

Use the Opportunity Product Schedules with Opportunity Product Splits report to show a list of opportunities by month with opportunity product split details. This report gives sales teams visibility to team member contribution to opportunities with product schedules.

Report: Opportunity Product Schedules with Opportunity and Product Splits Opp Prod Sched with Opp Prod split													
Total Split Schedule Amount		USD 206,913,802,481.07											
User	Schedule Month	10/1/2017	5/1/2019	8/1/2019	9/1/2019	11/1/2019	12/1/2019	1/1/2020	2/1/2020	3/1/2020	4/1/2020	5/1/2020	6/1/2020
<input type="checkbox"/> Admin User	Sum of Split Schedule Amount	USD 0.00	USD 891.49	USD 40.00	USD 406.70	USD 7.50	USD 20.00	USD 12.50	USD 11.55	USD 20.00	USD 10.00	USD 5,020.50	USD 31.00
<input type="checkbox"/> Another Standard	Sum of Split Schedule Amount	USD 0.00	USD 0.00	USD 0.00	USD 0.00	USD 0.00	USD 0.00	USD 0.00	USD 0.00	USD 0.00	USD 0.00	USD 0.00	USD 0.00
<input type="checkbox"/> Rachna Rachna Singh	Sum of Split Schedule Amount	USD 0.00	USD 0.00	USD 0.00	USD 0.00	USD 0.00	USD 0.00	USD 0.00	USD 0.00	USD 0.00	USD 0.00	USD 0.00	USD 0.00
<input type="checkbox"/> stan standard	Sum of Split Schedule Amount	USD 0.00	USD 0.00	USD 0.00	USD 0.00	USD 0.00	USD 0.00	USD 0.00	USD 0.00	USD 0.00	USD 0.00	USD 0.00	USD 0.00
<b>Total</b>	Sum of Split Schedule Amount	USD 0.00	USD 891.49	USD 40.00	USD 406.70	USD 7.50	USD 20.00	USD 12.50	USD 11.55	USD 20.00	USD 10.00	USD 5,020.50	USD 31.00
Details (1020 Rows) Click an intersection in the table above to filter details.													
Percent (%)	Split Schedule Amount	Product Name	Schedule Amount	Opportunity Name	Opportunity Owner	Is Product Split	Amount Renamed						
8 100.00%	USD 40.00	Chile	USD 40.00	Muffins	Admin User	<input type="checkbox"/>	USD 40.00						
9 100.00%	USD 30.00	Chile	USD 30.00	First Clone2	Admin User	<input type="checkbox"/>	USD 79.34						
10 100.00%	USD 12.00	Hot Dog	USD 12.00	First Clone2	Admin User	<input type="checkbox"/>	USD 79.34						
11 100.00%	USD 6.93	Churro	USD 6.93	First Clone2	Admin User	<input type="checkbox"/>	USD 79.34						
12 100.00%	USD 12.50	Chicken Dog	USD 12.50	First Clone2	Admin User	<input type="checkbox"/>	USD 79.34						
13 100.00%	USD 12.50	Chicken Dog	USD 12.50	First Clone	Admin User	<input type="checkbox"/>	USD 79.34						
14 100.00%	USD 30.00	Chile	USD 30.00	First Clone	Admin User	<input type="checkbox"/>	USD 79.34						

**How:** To view the reports, go to the reports tab and search for Opportunities.

#### SEE ALSO:

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

[Salesforce Help: Guidelines for Using Opportunity Splits and Opportunity Product Splits \(can be outdated or unavailable during release preview\)](#)

## See Opportunity Product Splits in Forecasts

Now sales teams can create forecasts based on opportunities with opportunity product splits, so they can project sales based on the deals they support. Revenue for opportunity team members' product splits is reflected in Collaborative Forecasts when a forecast type is created based on the Opportunity Product Split object. Previously, you could forecast on opportunity splits.

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

#### SEE ALSO:

[Forecast on Opportunity Product Splits](#)

[Salesforce Help: Forecast Types in Collaborative Forecasts \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Create and Manage Forecast Types in Collaborative Forecasts \(can be outdated or unavailable during release preview\)](#)



## Quotes

Sales reps no longer have to follow the opportunity-to-quote flow previously required.

### IN THIS SECTION:

#### [Create Quotes Without a Related Opportunity](#)

Sales reps no longer have to follow the opportunity-to-quote flow. They can fast-track deals by creating quotes without first creating an opportunity, speeding up delivering quotes to their customers for review. Quotes must be related to an account when they're converted to orders.

## Create Quotes Without a Related Opportunity

Sales reps no longer have to follow the opportunity-to-quote flow. They can fast-track deals by creating quotes without first creating an opportunity, speeding up delivering quotes to their customers for review. Quotes must be related to an account when they're converted to orders.

**Where:** This change applies to the Sales Cloud in Lightning Experience in Enterprise, Unlimited, Professional, and Developer editions. This change also applies to [Aura](#), [LWR](#), and [Visualforce sites](#) accessed through Lightning Experience in the same editions.

**How:** When you enable quotes in Quote Settings, select **Create Quotes Without a Related Opportunity**.

## Calendar

Save time by creating events directly from the calendar grid in availability view. Scroll less and see more of your calendar area by collapsing calendar user lists. Get a clearer overview of your schedule with up to 500 events in your calendar. And get to your calendar with one click in the dynamic activity composer.

### IN THIS SECTION:

#### [Maximize Your Productivity with Calendar Enhancements](#)

Get a clearer overview of your schedule with up to 500 events in your calendar view. Easily scan your upcoming meetings with longer event text and overlapping tiles. And prevent accidental event expansion by clicking one time to preview and again to open.

#### [Click Once to See Your Calendar](#)

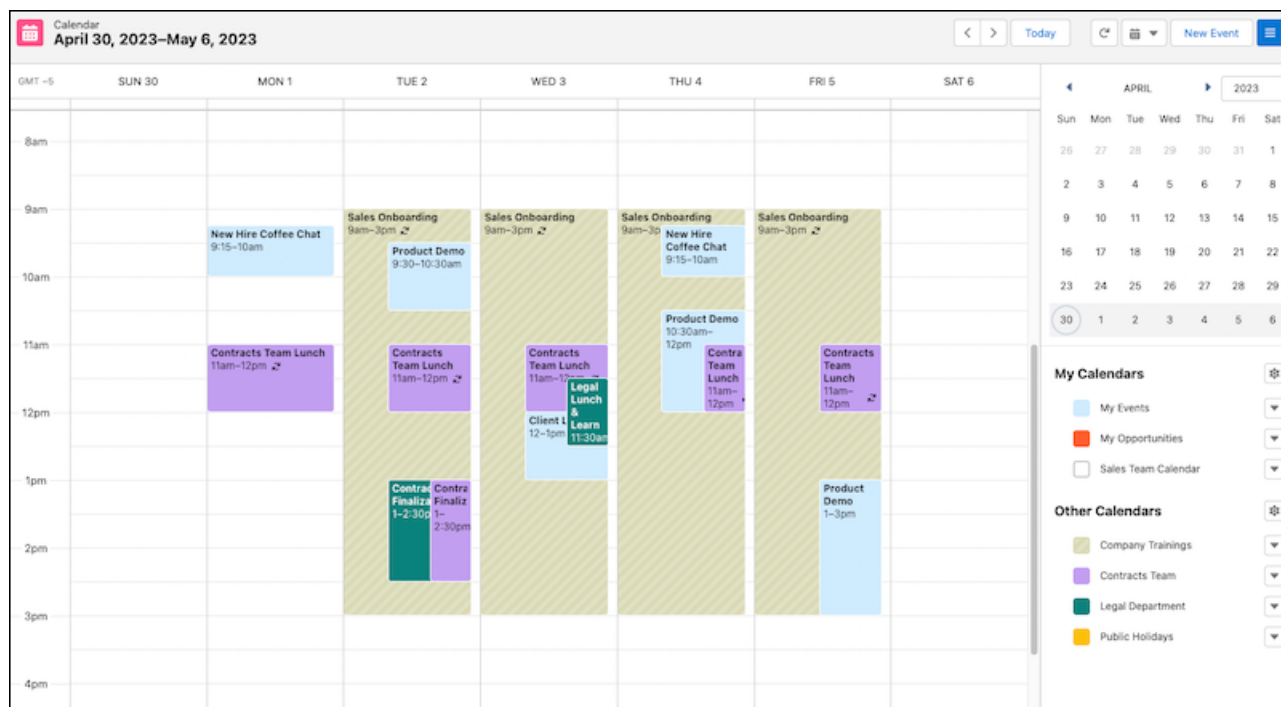
Easily pop open your calendar in a new tab as you schedule events from a record so you can see when you have conflicts. Previously, from the Salesforce console you went to your calendar and away from your current view.

## Maximize Your Productivity with Calendar Enhancements

Get a clearer overview of your schedule with up to 500 events in your calendar view. Easily scan your upcoming meetings with longer event text and overlapping tiles. And prevent accidental event expansion by clicking one time to preview and again to open.

**Where:** These changes apply to Lightning Experience in all editions.

**How:** To show calendar enhancements, from Setup, in the Quick Find box, enter *Activity Settings*, and then select **Use Lightning Web Components for Calendar Home**. This setting applies these styling changes to your users' calendars.



- See up to 500 events in the Calendar view.
- Enable events for up to 50 shared calendars and resources.
- Drag events to reschedule in 15-minute increments.
- Click an event to preview. Click again to open the event record page. Previously, you hovered to preview.
- To navigate to the day view, click a date in the month or week view.
- The browser's Back and Forward buttons move within the Calendar.
- Calendar views show overlapping event tiles, expanded text, and shaded coloring for dates in the past.

#### SEE ALSO:

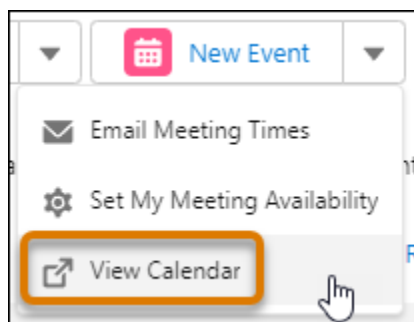
[Salesforce Help: Considerations for Using Events and Calendars in Lightning Experience \(can be outdated or unavailable during release preview\)](#)

## Click Once to See Your Calendar

Easily pop open your calendar in a new tab as you schedule events from a record so you can see when you have conflicts. Previously, from the Salesforce console you went to your calendar and away from your current view.

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

**How:** In the dynamic activity composer, click **View Calendar** from the New Event dropdown.



If this option isn't visible, confirm that the New Event action is on the page layout.

SEE ALSO:

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

## Encourage Repeat Orders Using a Commerce Reorder Portal

Simplify the reorder process with a Commerce Reorder Portal. When you integrate this portal with Sales, reps can invite a buyer to the portal to view past orders, modify quantities, place new orders, and view order statuses.

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

SEE ALSO:

[Accelerate Self-Service Reorders with a Commerce Reorder Portal](#)

## Sales Engagement

Manage cadence step timing more easily, let users control the timing of cadence task assignment, repeat steps in quick cadences, and see cadence usage data. Let managers create automated actions, search for items in the To Do List, and manage work items from flows in the To Do List.

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:

### [Manage Cadence Step Timing More Precisely](#)

New fields on email, call, LinkedIn, custom, and listener steps let cadence builders control when the step starts and when it becomes overdue. These fields help simplify managers' cadences and replace wait steps. By eliminating the need for wait steps, the new fields simplify cadence structure, reduce the number of steps, and make cadence authoring faster.

### [Cadence Wait Steps Are Being Retired](#)

Because of the introduction of new step timing fields on cadence action and listener steps, wait steps are no longer needed. In Summer '23, when editing cadences, the Cadence Builder will prompt authors to replace wait steps with the timing fields in the next step. Authors can't save changes to cadences containing wait steps. In Winter '24, remaining wait steps will be automatically converted to use the Start This Step field on the action steps that follow each wait step.

### [Let Users Control When Cadence Tasks Are Assigned to Them](#)

Sales Engagement users can now choose when cadence tasks are assigned to them and appear in the To Do List and Work Queue. By setting their Cadence Assignment Availability in their profile, users have more control over their work and prevent cadence tasks from becoming overdue during times when they don't plan to work on cadences. Cadence step tasks for targets they own are only added during those hours.

### [Repeat Outreach Steps with Quick Cadences](#)

Quick cadences can be used in more situations and save more time by letting users assign prospects to receive more than one call, email, or other outreach. Users can set a quick cadence to repeat its action for a length of time or until the engagement they want occurs. For example, with a repeating cadence, users can send an email or make a call on a regular schedule until they get an email open or a meaningful connection. Users can repeat an action up to 10 times.

### [See Prospect Engagements for the Month at a Glance](#)

Easily identify your most engaged prospects with the new Engagement History field. The field contains a chart showing all outbound activities and inbound engagement for the past 30 days. Reps can instantly see when and how often each lead, contact, or person account has been engaged so they can reach out at the right moment. Previously, users could see the number of recent engagements on prospect records, but not the timing.

### [Discover Which Cadences Have the Most Activity](#)

New fields on cadence records show detailed usage statistics for each cadence. Managers can use this information to compare and improve their cadences.

### [Let Managers Speed Up Common Cadence Tasks for Their Teams with Automated Actions](#)

Managers can save their teams time by creating automated actions for their reps. Automated actions can perform cadence target management tasks without user interaction. Previously, automated actions were created and owned by individual users. Now managers can create these actions on their team's behalf.

### [Set Automated Actions to Remind Users Instead of Acting Automatically](#)

Users now have more control over how their automated actions work. Users can now set up automated actions while maintaining the ability to opt out of performing the action on a specific record. Previously, all automated actions performed their action automatically when the user's conditions are met. Now users can set up actions to show a reminder prompting them to decide whether to perform the action. These reminders appear in the Automated Action Reminders component on records that trigger an action.

### [Find Items Quickly in the To Do List with Search](#)

Users can use the new search field to quickly find the specific items they're looking for in the To Do List. Users can act on the tasks that matter most, wherever those items are in the list. Previously, users could tag items and create lists, but not search.

### [Manage Flow Orchestration Work Items in the To Do List](#)

Users can now view and initiate work items created by flow orchestrations in their To Do List. Now even more of a user's tasks are available to manage and act upon in the list. Previously, work items from flow orchestrations weren't included in the To Do List.

### [Accelerate Sales Cycles with a Buyer Assistant \(Beta\)](#)

Deliver personalized conversations and generate qualified leads with a customer-focused buyer assistant. Buyer Assistant bots transform the web-to-lead experience and help you build customer relationships at scale. Each buyer assistant includes dialogs and automation flows designed to streamline sales. For example, a buyer assistant can pitch your products' value to customers after business hours, gather customer information, and schedule customer meetings. And you can personalize Buyer Assistant bots to meet your business needs. Get a buyer assistant for web up and running quickly with a guided onboarding experience.

### [Sales Cloud Now Includes Quick Cadences and Email Productivity Features in Professional and Enterprise Editions](#)

To add more value to Sales Cloud in Professional and Enterprise Editions, we're now including features and functionality that previously required purchasing an add-on license. These features include quick cadences and email productivity tools such as send later, email tracking, text shortcuts, and email engagement. Email engagement features include My Feed inside of the Outlook and Gmail integration panels, notifications from Sales Cloud Everywhere, and custom report types for engagement data.

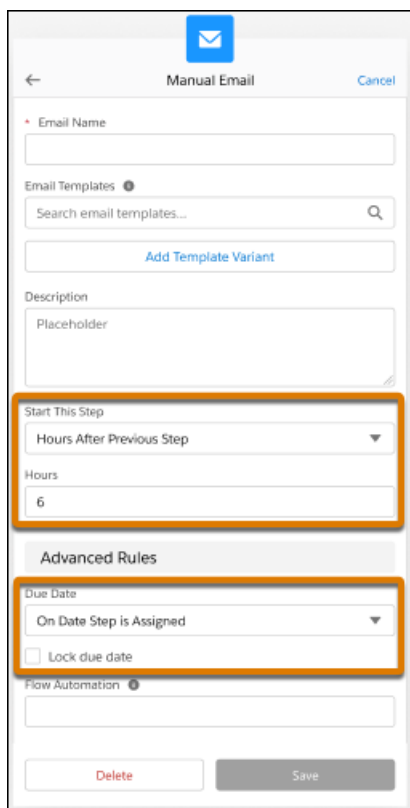
## Manage Cadence Step Timing More Precisely

New fields on email, call, LinkedIn, custom, and listener steps let cadence builders control when the step starts and when it becomes overdue. These fields help simplify managers' cadences and replace wait steps. By eliminating the need for wait steps, the new fields simplify cadence structure, reduce the number of steps, and make cadence authoring faster.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions with Sales Cloud.

**Why:** The new Start This Step, Start Time, and Due Date fields let cadence creators specify:

- How much time passes between the previous step and the current step
- The time of day the step starts
- When the step is due to be completed
- Whether the step due date is locked. When not locked, the due date can be updated when the target reaches the step.



To pause or change the timing of a step in the Sales Engagement component, users can select Adjust Cadence Timing. Then they can change when the step is due or pause the step indefinitely.

## Cadence Wait Steps Are Being Retired

Because of the introduction of new step timing fields on cadence action and listener steps, wait steps are no longer needed. In Summer '23, when editing cadences, the Cadence Builder will prompt authors to replace wait steps with the timing fields in the next step. Authors can't save changes to cadences containing wait steps. In Winter '24, remaining wait steps will be automatically converted to use the Start This Step field on the action steps that follow each wait step.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions with Sales Cloud.

**Why:** For example, in Summer '23 if a cadence includes a call step followed by a one-day wait step and then an email step, the cadence author can remove the wait step and edit the email step. In the email step, they can add a Start This Step value of one day after the previous step.

If you have custom code that relies on the presence of wait steps, you must update that code.

## Let Users Control When Cadence Tasks Are Assigned to Them

Sales Engagement users can now choose when cadence tasks are assigned to them and appear in the To Do List and Work Queue. By setting their Cadence Assignment Availability in their profile, users have more control over their work and prevent cadence tasks from becoming overdue during times when they don't plan to work on cadences. Cadence step tasks for targets they own are only added during those hours.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions with Sales Cloud.

**Why:** Users can quickly set their Cadence Assignment Availability in the Personal Information section of their user profile.

**Cadence Assignment Availability**  
 New cadence tasks will appear in your Work Queue and To Do List only during the hours you set here.  
 Your schedule is based on your time zone: (America/Los\_Angeles). [Change Time Zone](#)

	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
Monday		9:00 AM - 5:00 PM					
Tuesday		9:00 AM - 5:00 PM					
Wednesday		9:00 AM - 5:00 PM					
Thursday		9:00 AM - 5:00 PM					
Friday		9:00 AM - 5:00 PM					

[Copy Time to All Days](#)

[Save](#)

**How:** Turn on User Cadence Assignment Availability in Sales Engagement Setup and tell users to add their available hours in the Cadence Settings section of their user profile.


## Repeat Outreach Steps with Quick Cadences

Quick cadences can be used in more situations and save more time by letting users assign prospects to receive more than one call, email, or other outreach. Users can set a quick cadence to repeat its action for a length of time or until the engagement they want occurs. For example, with a repeating cadence, users can send an email or make a call on a regular schedule until they get an email open or a meaningful connection. Users can repeat an action up to 10 times.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions with Sales Cloud.

**How:** Use the new Repeat, Repeat Every, Period, Number of Repeats, and Repeat Until fields when creating a quick cadence.

### New Quick Cadence

 **Make a Call**

**\* Name**

Description

Call Script

**\* Start This Quick Cadence**

Days After Assignment

**\* Days**

**\* Start Time**

**\* Due Date**

Date Cadence is Assigned

**\* Repeat**

Custom

**\* Repeat Every**

**\* Period**

Hours

**\* Number of Repeats**

**Repeat Until**

Available

- Not Interested
- Unqualified
- Left Voicemail
- Call Back Later

Chosen

- Meaningful Connect

**Add an Automated Action?**

When you're finished here, you can automate adding targets to this cadence.

Add Automated Action ☐

Cancel

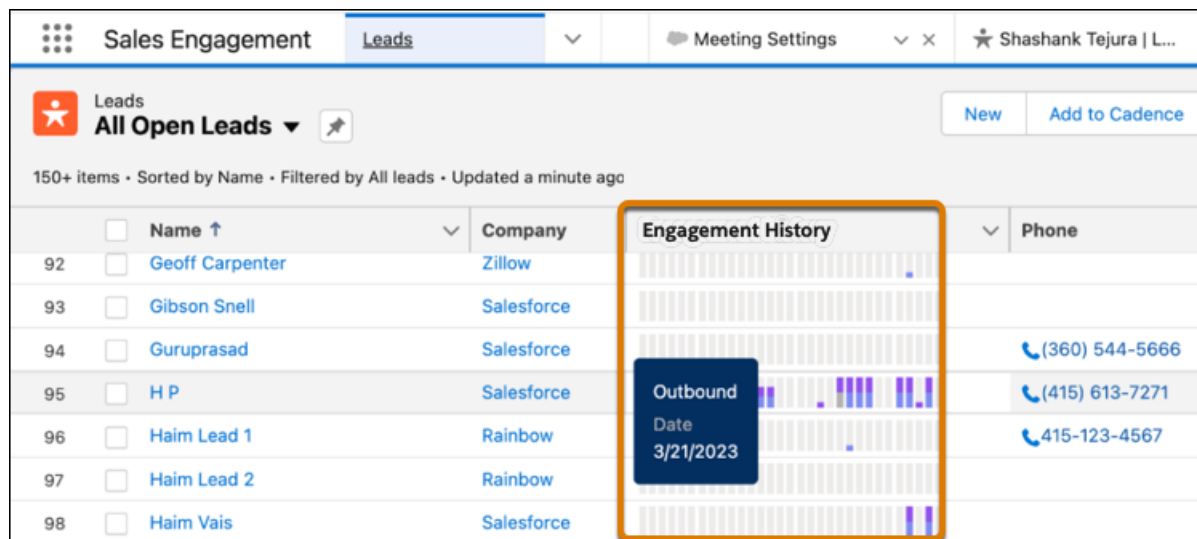
Save

## See Prospect Engagements for the Month at a Glance

Easily identify your most engaged prospects with the new Engagement History field. The field contains a chart showing all outbound activities and inbound engagement for the past 30 days. Reps can instantly see when and how often each lead, contact, or person account has been engaged so they can reach out at the right moment. Previously, users could see the number of recent engagements on prospect records, but not the timing.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions with Sales Cloud.

**Why:** For example, Leads list views show which leads are engaged, when inbound and outbound engagements occurred, and how often.



## Discover Which Cadences Have the Most Activity

New fields on cadence records show detailed usage statistics for each cadence. Managers can use this information to compare and improve their cadences.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions with Sales Cloud.

**Why:** Use the new Active Targets, Total Targets, Successful Completions, and Total Steps fields to see which cadences are used most by reps and which take the most targets through all the steps to completion. These fields are updated once per day.

The screenshot shows the 'Cadences' list view in Salesforce. The table displays the following data:

CADENCES	Cadence Name	State	Total Targets	Active Targets	Successful Co...	Total Steps	Description
Popular Cadences	Initiate Contact with New Prospects	Active	1,065	14	1	7	
Recently Viewed	Onboard New Customers	Active	690	52	1	5	
My Private Cadences	Nurture Existing Customers	Active	505	3	4	1	
Public Cadences	Follow Up on Interested Prospects	Active	451	48		2	

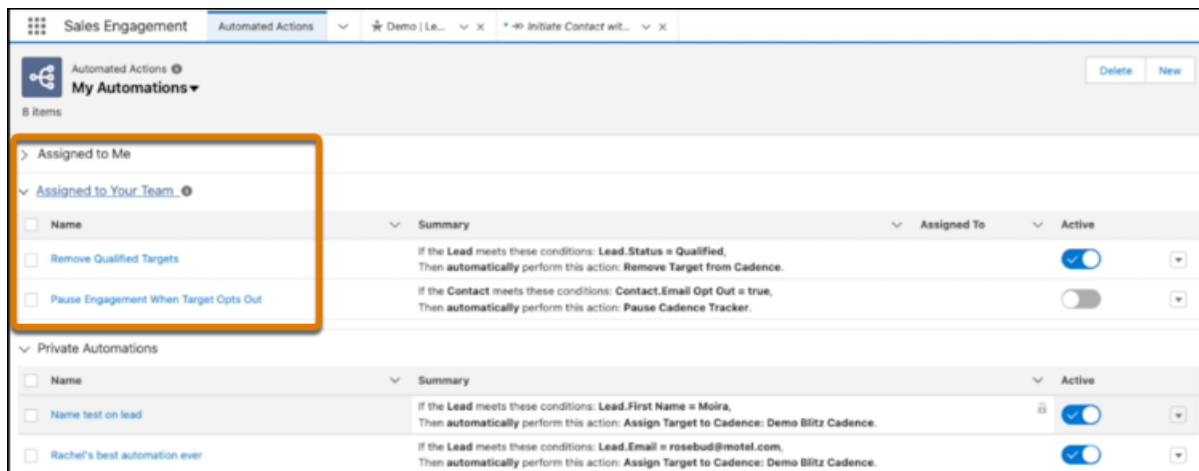


## Let Managers Speed Up Common Cadence Tasks for Their Teams with Automated Actions

Managers can save their teams time by creating automated actions for their reps. Automated actions can perform cadence target management tasks without user interaction. Previously, automated actions were created and owned by individual users. Now managers can create these actions on their team's behalf.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions with Sales Cloud.

**Why:** With simple if-this-then-that logic, automated actions can automatically add, remove, pause, or resume cadence targets and change target assignees based on criteria they choose. For example, managers can create an automated action to add new leads to a cadence and then assign it to their team members.



On the manager's Automated Actions home page, they can see actions they've assigned to their team, actions assigned to them, and their private automations.

Sales Engagement includes five automated actions for each user.

- 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

Managers can choose whether each automated action is always on for their subordinates, or to let team members turn the automation on and off.

**How:** To enable automated actions for managers, turn on Let managers create automated actions for their subordinates in Automated Actions Setup. Then turn on Manager Groups in Sharing Settings. Then ensure that each user has their manager indicated in their user record.

## Set Automated Actions to Remind Users Instead of Acting Automatically

Users now have more control over how their automated actions work. Users can now set up automated actions while maintaining the ability to opt out of performing the action on a specific record. Previously, all automated actions performed their action automatically when the user's conditions are met. Now users can set up actions to show a reminder prompting them to decide whether to perform the action. These reminders appear in the Automated Action Reminders component on records that trigger an action.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions with Sales Cloud.

**How:** When creating an automated action, users can specify whether to perform the action automatically or to show a reminder.

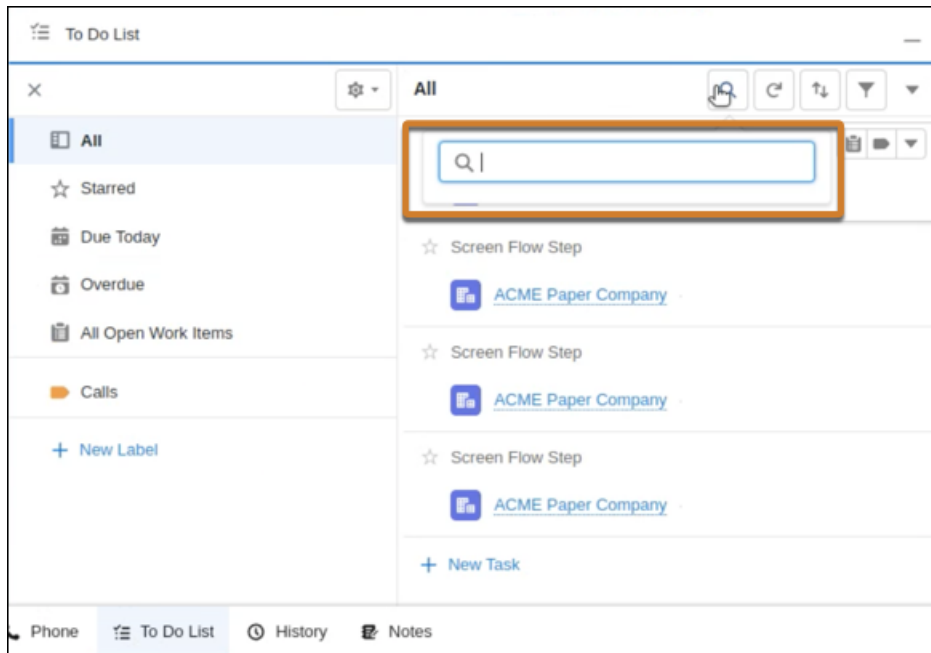
Using the Lightning App Builder, the Automated Action Reminders component can be added to lead, contact, person account, case, opportunity, and invoice record detail pages.

## Find Items Quickly in the To Do List with Search

Users can use the new search field to quickly find the specific items they're looking for in the To Do List. Users can act on the tasks that matter most, wherever those items are in the list. Previously, users could tag items and create lists, but not search.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions with Sales Cloud.

**Why:** With the search field, users can jump directly to an item they want to work on.



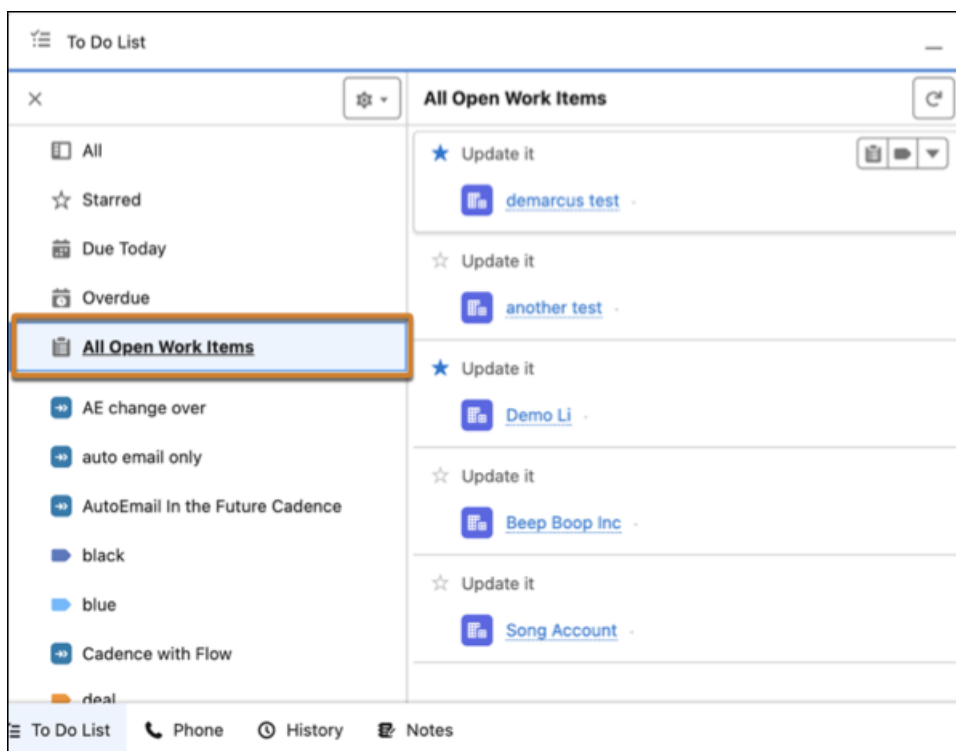
Search results include standard tasks and tasks from cadences, but not work items from flows.

## Manage Flow Orchestration Work Items in the To Do List

Users can now view and initiate work items created by flow orchestrations in their To Do List. Now even more of a user's tasks are available to manage and act upon in the list. Previously, work items from flow orchestrations weren't included in the To Do List.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions with Sales Cloud.

**Why:** When the Salesforce admin creates flow orchestrations that create work items for users, the work items appear in the To Do List. Users can then manage those items along with their other tasks.



## Accelerate Sales Cycles with a Buyer Assistant (Beta)

Deliver personalized conversations and generate qualified leads with a customer-focused buyer assistant. Buyer Assistant bots transform the web-to-lead experience and help you build customer relationships at scale. Each buyer assistant includes dialogs and automation flows designed to streamline sales. For example, a buyer assistant can pitch your products' value to customers after business hours, gather customer information, and schedule customer meetings. And you can personalize Buyer Assistant bots to meet your business needs. Get a buyer assistant for web up and running quickly with a guided onboarding experience.

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



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

**When:** Buyer Assistant is available the week of June 12, 2023.

**How:** To create a buyer assistant, go to the Buyer Assistant (beta) page under Sales Engagement in Setup. Or go to the Einstein Bots setup page and then create an enhanced bot using the Buyer Assistant (beta) template.

SEE ALSO:

[Salesforce Help: Automate Sales Outreach a Buyer Assistant \(Beta\)](#)

## Sales Cloud Now Includes Quick Cadences and Email Productivity Features in Professional and Enterprise Editions

To add more value to Sales Cloud in Professional and Enterprise Editions, we're now including features and functionality that previously required purchasing an add-on license. These features include quick cadences and email productivity tools such as send later, email tracking, text shortcuts, and email engagement. Email engagement features include My Feed inside of the Outlook and Gmail integration panels, notifications from Sales Cloud Everywhere, and custom report types for engagement data.

**Where:** This change applies to Sales Cloud in Lightning Experience in Enterprise and Professional Editions.

**When:** This change will appear on July 19, 2023.

**Why:** These features provide additional functions that make sellers' work easier and more efficient.

**How:** Not all features now included in Professional and Enterprise Editions are enabled automatically. In Setup, enable the specific features you want for your business. To let new users access these features, assign them the appropriate permission. These new features can be assigned to up to 100 users.

SEE ALSO:

[Salesforce Help: Simplifying Outreach Tasks with Quick Cadences](#)

[Salesforce Help: Work With Salesforce's Email](#)

[Salesforce Help: Turn On Sales Engagement Features](#)

## Einstein Conversation Insights

Your teams can now use Einstein Conversation Insights with more voice recording providers, including Dialpad, RingCentral, Aircall, and Amazon Connect. Einstein Conversation Insights also supports over a dozen languages and several different dialects, and enhanced reporting features are available for everyone. Einstein Conversation Insights users are also prompted to turn on the speaker separation feature to help with the creation of transcripts and call insights.

Einstein Conversation Insights doesn't record your calls. You connect it with your recording system such as Sales Dialer, Service Cloud Voice, or other supported partners. It's a customer's responsibility to manage consent and comply with local privacy requirements in the way that calls are recorded.

IN THIS SECTION:

[Use Einstein Conversation Insights in Different Languages](#)

Einstein Conversation Insights now supports 16 languages and several dialects. Your sales and service teams speaking in Japanese, German, and over a dozen other languages can now use Einstein Conversation Insights to get transcripts, see call insights, and provide coaching recommendations.

[Turn On Optimal Speaker Separation](#)

Enable Optimal Speaker Separation to help with the creation of transcripts and call insights.

[Add More Voice Providers](#)

Einstein Conversation Insights now supports Dialpad, RingCentral, Aircall, and Amazon Connect. Your sales and service teams using these providers can get transcripts, insights, and action items for their customer conversations. Amazon Connect when used with Service Cloud Voice with Amazon Connect was already supported, but the provider is now supported without Service Cloud Voice. Visit AppExchange to add the new providers.

[More Reports Are Available for All Users](#)

Enhanced reporting measures are available for everyone, and the related setting is enabled by default. This feature includes out-of-the-box reports and dashboards for Einstein Conversation Insights users. Users can also create custom reports for Einstein Conversation Insights.

SEE ALSO:

[Einstein Release Notes](#)

## Use Einstein Conversation Insights in Different Languages

Einstein Conversation Insights now supports 16 languages and several dialects. Your sales and service teams speaking in Japanese, German, and over a dozen other languages can now use Einstein Conversation Insights to get transcripts, see call insights, and provide coaching recommendations.

**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.

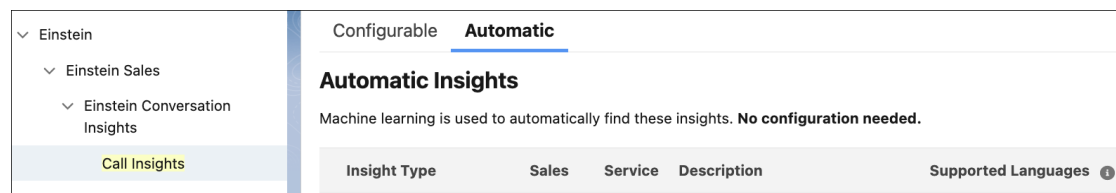
**Why:** The following languages (and dialects) are now supported.

- Arabic
- Danish
- Dutch
- French (Canada), French (France)
- German
- Hebrew
- Hindi
- Italian
- Japanese
- Korean
- Portuguese (Brazil), Portuguese (Portugal)
- Spanish (Spain), Spanish (US)
- Swedish
- Thai
- Turkish

English dialects from the following countries are also supported: Australia, England, India, Ireland, New Zealand, and Scotland.

**How:** Einstein Conversation Insights automatically determines the language used in call recordings. Insights are applied based on those that are available for supported languages and your call insights settings. Some features related to reports and dashboards aren't always fully translated in all languages.

To see the full list of supported automatic insights by language, go to Call Insights under Einstein Conversation Insights in Setup and select the **Automatic** tab.



The automatic insights available (including Next Steps and Objection-related insights) can vary widely by language. We're continually offering additional support, but make any usage decisions based on currently available insights.

Create custom call insights for the languages of your choice. Go to Call Insights under Einstein Conversation Insights in Setup and click **New Insight**.

**New Insight**

Select insight type

**Competitor**  
Competitors names you want to track in conversations

**Product**  
Products and features you want to track in conversations

**Custom Insight**  
Topics of interest that are unique to your business

Select language

This insight's keywords will appear only on calls in the selected language:

Spanish

Cancel Next

The new insight creation setup flow lets you select your language of choice.

## Turn On Optimal Speaker Separation

Enable Optimal Speaker Separation to help with the creation of transcripts and call insights.

**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.

**Why:** Most video and voice call providers identify speakers on the call. However, in cases where this information isn't identified or shared, the Optimal Speaker Separation feature is needed to help in the creation of transcripts and call insights. Many Einstein Conversation Insights features rely on the availability of separate speaker tracks, so we recommend that all users enable the feature.

Acoustic data used for speaker separation is private and is not tracked or used for purposes other than speaker separation in features that require it. After we process calls, we delete the acoustic features that are used to separate speakers from our system. For more information, see Optimal Speaker Separation.

**How:** Salesforce admins see a banner prompting them to enable optimal speaker separation. Click the link or go to General Settings under Einstein Conversation Insights in Setup and enable the feature.

✓ Einstein Conversation Insights

- Call Insights
- Delete Video Calls
- General Settings

✓ **Turn On Optimal Speaker Separation**

Allow Conversation Insights to use acoustic features of speaker voices to separate an audio stream into separate segments. [Learn More](#)

On

Einstein Conversation Insights users then receive individual banners prompting them to enable the feature. They can click the link or go to Einstein Conversation Insights in Personal Settings to enable the feature.

SEE ALSO:

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

## Add More Voice Providers

Einstein Conversation Insights now supports Dialpad, RingCentral, Aircall, and Amazon Connect. Your sales and service teams using these providers can get transcripts, insights, and action items for their customer conversations. Amazon Connect when used with Service Cloud Voice with Amazon Connect was already supported, but the provider is now supported without Service Cloud Voice. Visit AppExchange to add the new providers.

**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.

**How:** Visit AppExchange to enable the new voice providers with Einstein Conversation Insights.

## More Reports Are Available for All Users

Enhanced reporting measures are available for everyone, and the related setting is enabled by default. This feature includes out-of-the-box reports and dashboards for Einstein Conversation Insights users. Users can also create custom reports for Einstein Conversation Insights.

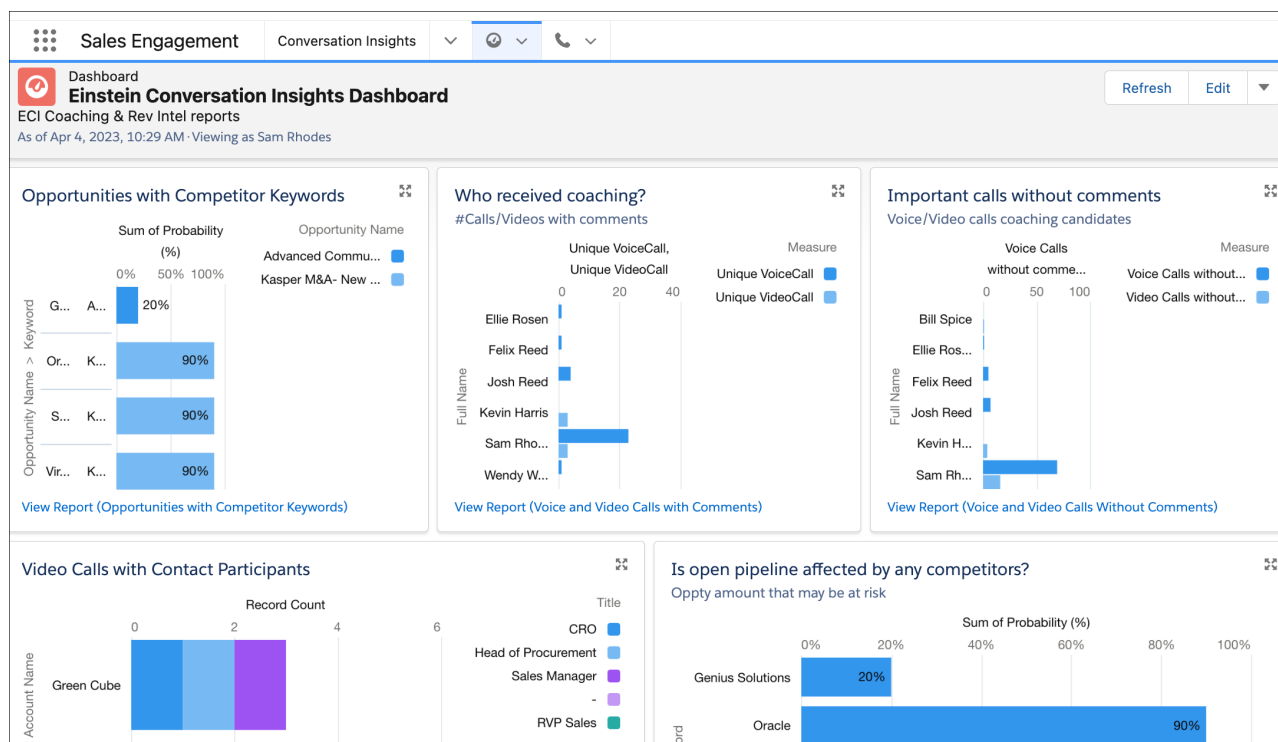
**Where:** This change applies to Einstein Conversation Insights in Lightning Experience. Einstein Conversation Insights is available in Performance and Unlimited editions and as an add-on in Enterprise Edition.

**Why:** Einstein Conversation Insights users can access several out-of-the-box reports and dashboards.

- Avg Talk-to-Listen Ratio for Sales Rep
- Opportunities with Competitor Keywords
- Opportunities with Voice Call Insights
- Opportunities with Video Calls Insights
- Deal Risks due to Objections
- Video Calls with Contact Participants
- Voice and Video Calls with Comments
- Voice and Video Calls Without Comments

A related dashboard is also available.





Also, if you're using Enablement programs, with this feature you can build milestones and outcomes related to conversation data from voice and video calls.

**How:** This feature is accessible from Setup, under Einstein Conversation Insights and General Settings. The **Turn On Insight Reports and Conversation Related Measures for Enablement** setting is enabled for all orgs using Einstein Conversation Insights this release.

## Revenue Intelligence

Try the new Sales Rep Command Center, which is laser-focused on providing your reps with key information. Identify potential sales using the Product Whitespace feature in Einstein Account Management. Understand your sales stages and identify bottlenecks using the Sales Stage analysis tool in Revenue Insights. Access your Revenue Insights dashboard directly from your mobile devices.

### IN THIS SECTION:

#### [Empower Sales Reps with the Revenue Intelligence Command Center](#)

Get all the details you need for sales success from the Sales Rep Command Center. You can see whether you're aligned to meet your quotas, which opportunities are stuck, and overdue activities. You can also see step progression, and amount changes.

#### [View Sales Details About Your Territories in Revenue Insights](#)

If you created a territory hierarchy in Collaborative Forecasts, you can now use that hierarchy type in Revenue Insights. Territory forecasts give your team a snapshot of how expected sales compared between territories. Previously, only a user role hierarchy was supported.

#### [Understand Your Sales Pipeline with the Sales Stage Analysis Dashboard](#)

Get a high-level view of your sales stages, identify bottlenecks and at-risk opportunities, and understand if deals are moving smoothly. The new Sales Stage Analysis tab in Revenue Insights shows how long deals remain in each stage. You can see which deals are stalled, and which opportunities had amount changes or were pushed.

### Find Your Untapped Opportunities Using Product Whitespace

Identify potential sales in Einstein Account Management. In the Product Whitespace view, see which products your accounts purchased and identify gaps for upsell opportunities.

### Get Even More Details About Deals to Focus On

Get more information about the deals to focus on from the enhanced Revenue Intelligence Deals to Focus On dashboard. When you open the new pop-out details page from the dashboard, you can easily see all relevant details about your opportunities, such as the Einstein opportunity score and days to close.

### Access Revenue Insights Directly from Your Mobile Device

Make on-the-go sales decisions by accessing your Revenue Insights Overview dashboard directly from your mobile device.

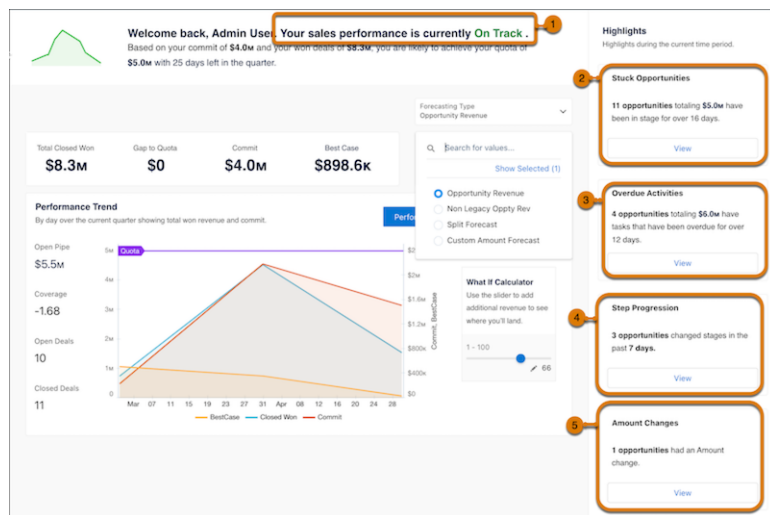
## Empower Sales Reps with the Revenue Intelligence Command Center

Get all the details you need for sales success from the Sales Rep Command Center. You can see whether you're aligned to meet your quotas, which opportunities are stuck, and overdue activities. You can also see step progression, and amount changes.

**Where:** This change applies to Revenue Intelligence in Sales Cloud in Lightning Experience in Enterprise and Unlimited editions for an additional cost.

**Who:** To use Revenue Intelligence, you must have a Revenue Intelligence Admin permission set. To access the Revenue Intelligence app, users must have a Revenue Intelligence User permission set.

**How:** In the Sales Rep Command Center, you can immediately see if you're on track (1). You can view stuck opportunities (2), overdue activities (3), step progression (4), and amount changes (5).



## View Sales Details About Your Territories in Revenue Insights

If you created a territory hierarchy in Collaborative Forecasts, you can now use that hierarchy type in Revenue Insights. Territory forecasts give your team a snapshot of how expected sales compared between territories. Previously, only a user role hierarchy was supported.

**Where:** This change applies to Revenue Intelligence in Sales Cloud in Lightning Experience in Enterprise and Unlimited editions for an additional cost.

**Who:** To use Revenue Intelligence, you must have a Revenue Intelligence Admin permission set. To access the Revenue Intelligence app, users must have a Revenue Intelligence User permission set.

**How:** When you enable Revenue Insights from the Setup menu, the app automatically detects the hierarchy that you created in Collaborative Forecasts. When you view Revenue Insights dashboards, you can view details about your territory hierarchy.

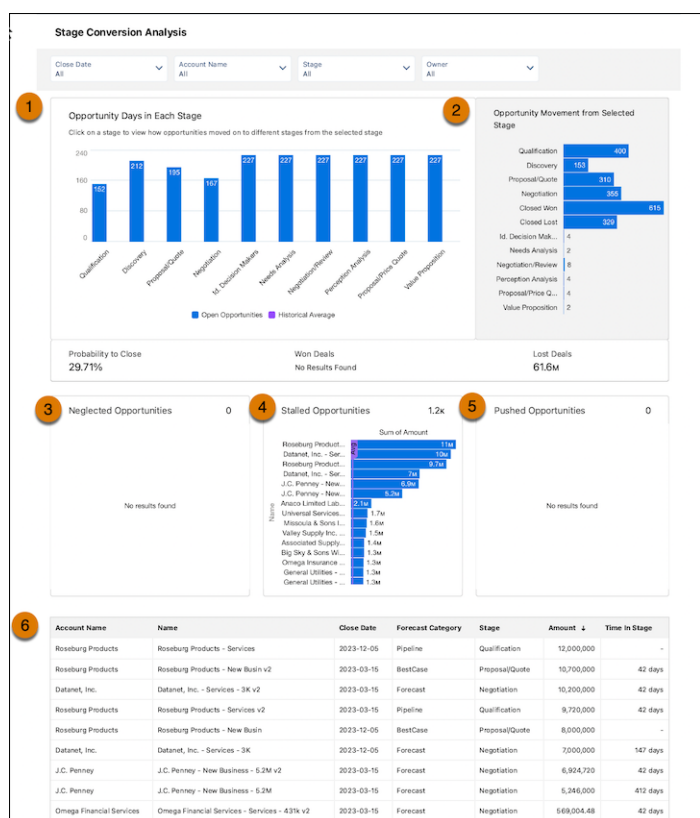
## Understand Your Sales Pipeline with the Sales Stage Analysis Dashboard

Get a high-level view of your sales stages, identify bottlenecks and at-risk opportunities, and understand if deals are moving smoothly. The new Sales Stage Analysis tab in Revenue Insights shows how long deals remain in each stage. You can see which deals are stalled, and which opportunities had amount changes or were pushed.

**Where:** This change applies to Sales Cloud in Lightning Experience in Enterprise and Unlimited editions for an additional cost.

**Who:** To use Revenue Insights, you must have a Revenue Intelligence Admin permission set. To access Revenue Insights, users must have a Revenue Intelligence User permission set.

**How:** In the Sales Stage Analysis dashboard, view how long a deal was at each stage and the number of won and lost deals (1). Track opportunity movement (2) and neglected opportunities (3). You can also see which deals have been in the same stage for more than 30 days (4) and pushed opportunities (5). Lastly, take a deep dive into the different deals (6).



## Find Your Untapped Opportunities Using Product Whitespace

Identify potential sales in Einstein Account Management. In the Product Whitespace view, see which products your accounts purchased and identify gaps for upsell opportunities.

**Where:** This change applies to Sales Cloud in Lightning Experience in Enterprise and Unlimited editions for an additional cost.

**How:** In Einstein Account Management, click **Product Whitespace** (1). Choose whether you want to view whitespace by product family or product name (2). View the measure by price, product, or quantity (3), and filter by top amounts (4).



Get Even More Details About Deals to Focus On

Get more information about the deals to focus on from the enhanced Revenue Intelligence Deals to Focus On dashboard. When you open the new pop-out details page from the dashboard, you can easily see all relevant details about your opportunities, such as the Einstein opportunity score and days to close.

**Where:** This change applies to the Revenue Insights dashboard. Revenue Insights is in Sales Cloud in Lightning Experience in Enterprise and Unlimited editions for an additional cost.

**How:** From the Deals to Focus On dashboard, click the pop-out icon to see details. Click the arrow to see even more details.

What should I focus on?

Top Open Opportunities									
Commit	Most Likely	Best Case	Pipeline						
Opportunity Name	Account Name	Days to Close	Days Since Last Activity	Owner	Close Date	Opportunity Score	Amount		
Opportunity for Conner [220]	Lane Inc [221]	-19	2,430	Bruce Lowe	2023-03-22	0	\$1,013,985		
Opportunity for Norman [826]	Floyd Inc [141]	-10	2,814	Katharine Gilbert	2023-03-31	0	\$742,044		
Opportunity for Haynes [341]	Park Inc [191]	-10	2,417	Bruce Lowe	2023-03-31	0	\$263,032		
Opportunity for Moody [175]	Barton Inc [962]	-10	2,429	Mabel Gonzales	2023-03-31	0	\$211,614		
							Total Amount	\$2,230,675	

## Access Revenue Insights Directly from Your Mobile Device

Make on-the-go sales decisions by accessing your Revenue Insights Overview dashboard directly from your mobile device.

**Where:** This change applies to Lightning Experience and the Salesforce mobile app for iOS and Android in Professional, Developer, Enterprise, and Unlimited editions

**When:** CRM Analytics in Salesforce Mobile Home is available the week of June 12, 2023.

**How:** Download the Salesforce mobile app. In the mobile app, go to the CRM Analytics Revenue Insights dashboard.

## Pipeline Inspection

View the deals and pipelines of more users and teams, including opportunity teams and sales team members in other branches of the role hierarchy. Edit more fields inline in Pipeline Inspection views. Get Pipeline Inspection in Enterprise Edition without purchasing an add-on license for it. And in orgs created in Summer '23 and later, Pipeline Inspection is enabled by default.

### IN THIS SECTION:

#### [Use Expanded Filters to View More Deals and Pipelines in Pipeline Inspection](#)

Users can now view the pipelines of more users and teams, including opportunity teams and cross-functional team members. For example, sales strategists can view sales leaders' pipelines in other branches of the role hierarchy. Sales managers can also get visibility into the deals that sales specialists support. Users can also save filtered views of any user's or team's pipeline that they have access to.

#### [Get Sales Teams Started with Pipeline Inspection Fast](#)

Pipeline Inspection is now ready for your sales teams to use with less time and effort. In orgs created in Summer '23 and later, Pipeline Inspection is enabled for you, and it's the default view on the opportunities home page. You can still update the configuration, set up enhanced features, and manage permissions in Pipeline Inspection Setup.

#### [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.

#### [Update Opportunities More Efficiently in Pipeline Inspection](#)

Users can now update more opportunity fields inline in Pipeline Inspection while reviewing pipelines, saving time, and improving collaboration with their teams. Users can update email, phone, and URL fields on opportunities.

## Use Expanded Filters to View More Deals and Pipelines in Pipeline Inspection

Users can now view the pipelines of more users and teams, including opportunity teams and cross-functional team members. For example, sales strategists can view sales leaders' pipelines in other branches of the role hierarchy. Sales managers can also get visibility into the deals that sales specialists support. Users can also save filtered views of any user's or team's pipeline that they have access to.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions with Sales Cloud.

**How:** To let users view other users' and teams' pipelines in a different branch of the role hierarchy, assign users the View All permission on Opportunity.

To see a list of deals with a certain user's direct reports on the opportunity team, make sure that the manager and reps are in the same branch of the role hierarchy. In Pipeline Inspection, select the My Team's Opportunity Teams filter.

SEE ALSO:

[Salesforce Help: Object Permissions](#)

[Salesforce Help: Viewing and Editing Roles \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Managing Pipelines with Pipeline Inspection \(can be outdated or unavailable during release preview\)](#)

## Get Sales Teams Started with Pipeline Inspection Fast

Pipeline Inspection is now ready for your sales teams to use with less time and effort. In orgs created in Summer '23 and later, Pipeline Inspection is enabled for you, and it's the default view on the opportunities home page. You can still update the configuration, set up enhanced features, and manage permissions in Pipeline Inspection Setup.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions with Sales Cloud.

**How:** In Pipeline Inspection Setup, the feature is turned on and configured by default. Users can access Pipeline Inspection with a Standard User or System Administrator profile. Or, assign users one of the Pipeline Inspection permission sets.

If your org was created in Spring '23 or earlier, you can manually enable Pipeline Inspection. In Pipeline Inspection Setup, enable the feature and follow the configuration steps. Then, assign users permission and set up enhanced features.

SEE ALSO:

[Salesforce Help: Set Up Pipeline Inspection \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Select Who Can Use Pipeline Inspection \(can be outdated or unavailable during release preview\)](#)

## 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.

**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.

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

## Update Opportunities More Efficiently in Pipeline Inspection

Users can now update more opportunity fields inline in Pipeline Inspection while reviewing pipelines, saving time, and improving collaboration with their teams. Users can update email, phone, and URL fields on opportunities.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions with Sales Cloud.

**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 \(can be outdated or unavailable during release preview\)](#)

## Collaborative Forecasts

Assess the health of your forecasts with built-in charts. Make decisions with all the data you need in one place with referenced data in a custom column on the forecasts page. And increase visibility into split revenue for complex opportunities that are managed using opportunity product splits.

IN THIS SECTION:

[Assess the Health of Your Sales Forecasts with Built-In Charts](#)

Sales managers can use built-in charts to visualize the state of their forecasts and better assist their sales reps in meeting their sales targets. With forecast charts, see the changes to the current period's forecasts across forecast types and measure how this period's forecasts compares to past periods, without having to manually crunch the numbers.

[Add Custom Columns That Include External Data](#)

Make forecast decisions using all the data that matters to your business by adding your own external data to a column on the forecasts page. For example, add a column that shows data imported from an external source, such as Stretch Quota or Internal Booking Target. Having all the information used to project sales in one place helps provide more accurate forecasts without requiring you to navigate to other applications.

[Forecast on Opportunity Product Splits](#)

If your sales team uses opportunity product splits to coordinate selling opportunities that include multiple products, create forecasts that show the split revenue across product families. Forecasting on the product split increases visibility into individual sales rep and product forecasts. Previously, you could forecast on opportunity splits.

[View Einstein Predictions in a Full-Length Panel](#)

See more Einstein Prediction details at one time in a full, slide-out panel on the forecasts page. Previously, Einstein predictions were shown in a shortened panel with the introduction of forecasts pages in Lightning App Builder.

[See Recent Forecast Changes in the Salesforce Mobile App](#)

As a sales leader, you can see week-over-week forecast changes in the Salesforce mobile app so that you can adjust your sales strategies accordingly. Previously, recent forecast changes were available only on the desktop site.

## Assess the Health of Your Sales Forecasts with Built-In Charts

Sales managers can use built-in charts to visualize the state of their forecasts and better assist their sales reps in meeting their sales targets. With forecast charts, see the changes to the current period's forecasts across forecast types and measure how this period's forecasts compares to past periods, without having to manually crunch the numbers.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions with the Sales Cloud.

**How:** Ensure that Historical Trending is on for Forecasting Item. To get the most out of the charts, set the maximum retention period available. Then, for any forecast type, sales leaders click **Charts** on the forecasts page.

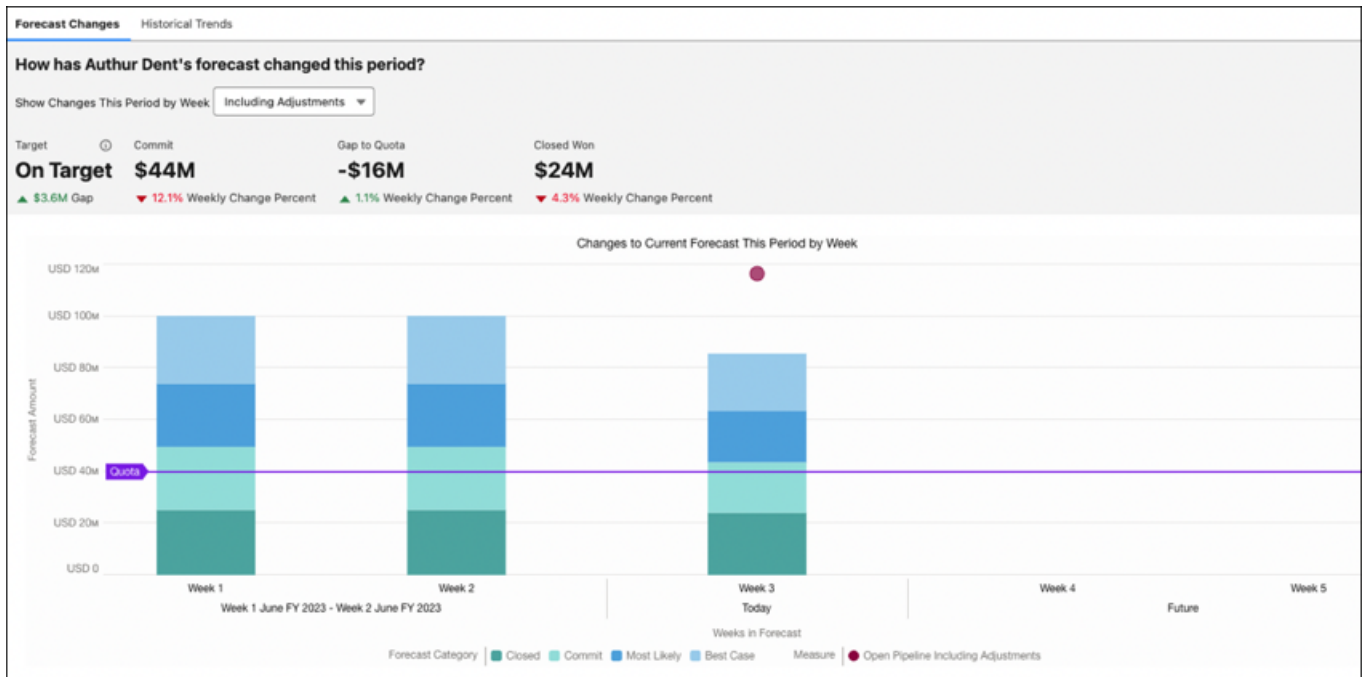
Forecasts > Opportunity Revenue  
**Wanda Wilson** ▼

Mark Watson > Wanda Wilson

Last updated 01/12/2022 at 3:33 PM

Grid Chart

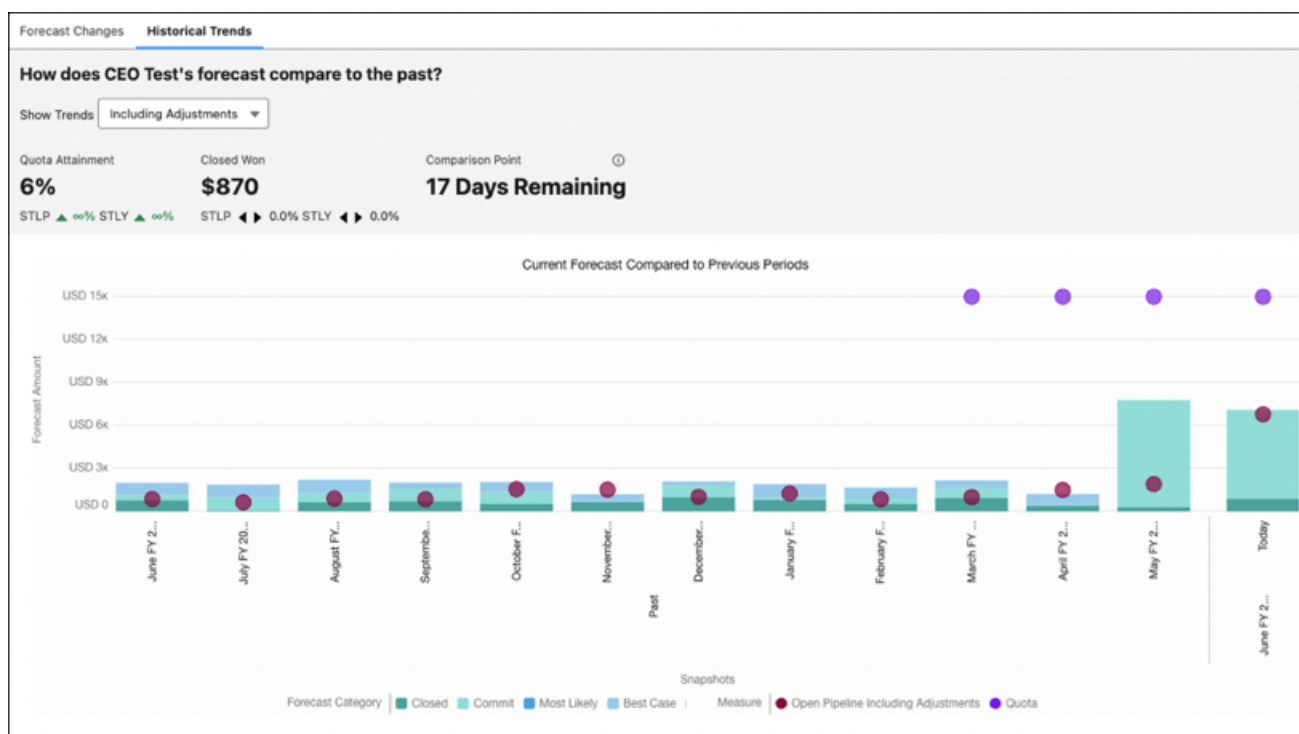
In the Forecasts Changes chart, review how the current forecast has changed week to week by forecast category.



Hover over each segment for more details about the changes compared to the previous time segment. If Einstein Forecasting is enabled, this chart replaces the Einstein Forecasting chart on the forecasts page.

In the Historical Trends chart, evaluate how forecasts for the current period compare to the same time in past periods. Understanding trends across periods can help to identify areas where sales reps or managers need assistance and mentoring and where they excel.





SEE ALSO:

[Salesforce Help: Reviewing Week-to-Week Forecast Changes](#)(can be outdated or unavailable during release preview)

[Salesforce Help: Finding Trends Across Forecast Periods](#)(can be outdated or unavailable during release preview)

## Add Custom Columns That Include External Data

Make forecast decisions using all the data that matters to your business by adding your own external data to a column on the forecasts page. For example, add a column that shows data imported from an external source, such as Stretch Quota or Internal Booking Target. Having all the information used to project sales in one place helps provide more accurate forecasts without requiring you to navigate to other applications.

**Where:** This change applies to Lightning Experience and all versions of the mobile app in Enterprise, Performance, and Unlimited editions with the Sales Cloud.

**How:** Add a custom number or currency field to the Forecasting Custom Data object to store the data. Then, users with access to import data and who have the Manage Forecast Custom Data permission can import data to each forecast type using Data Loader or through the API. The data you import can be unique to each forecast type. The custom values don't roll up into forecast numbers and aren't available for adjustment.

After the data is available, add a custom column to the forecast type that references the custom field in the Forecasting Custom Data object.

### Add custom column

Select the column type you want to create and provide the details for that type. Formula columns show values calculated using a formula. Reference columns show values from custom data available to Salesforce. Neither of these custom column value types are included in the rollups.

\* Column Type  
Reference Data

**Select the Data to Show**  
Select a number or currency field from the ForecastingCustomData object. The data in the field that you select appears in the column in the forecast summary.

\* Field to Reference  
Stretch\_Quota

\* Column Name  
Stretch Quota

\* Data Type  
Currency

The column's data type is automatically set to the type of data available in the selected field.

Cancel Save

Add the new column to the forecast type to see it on the forecasts page.

Months	Stretch Quota	Closed	Commit
Total: 2 Months	\$ 55,000	\$997,323.68	\$2,483,169.26
> January FY 2023	\$20,000	\$653,122.63	\$1,293,274.78
> February FY 2023	\$35,000	\$344,201.05	\$1,189,894.48

Showing opportunities for: Charlie Thomas • January FY 2023 • All Forecast Categories

	Opportunity Name	Account Name	Amount	Close Date	Stage
1	telecom WebMD	Shire Eltek Inc.	(\$55,297.42)	1/31/2023	Proposal/Price Quo...
2	AMC Sons Corp	Speedway InterMune ...	(\$35,935.10)	1/12/2023	Prospecting
3	Sagent Melco	Newport World Ltd.	(\$32,347.04)	1/25/2023...	Proposal/Price Quo...

SEE ALSO:

[Salesforce Help: Managing External Data to Include in Collaborative Forecasts](#) (can be outdated or unavailable during release preview)

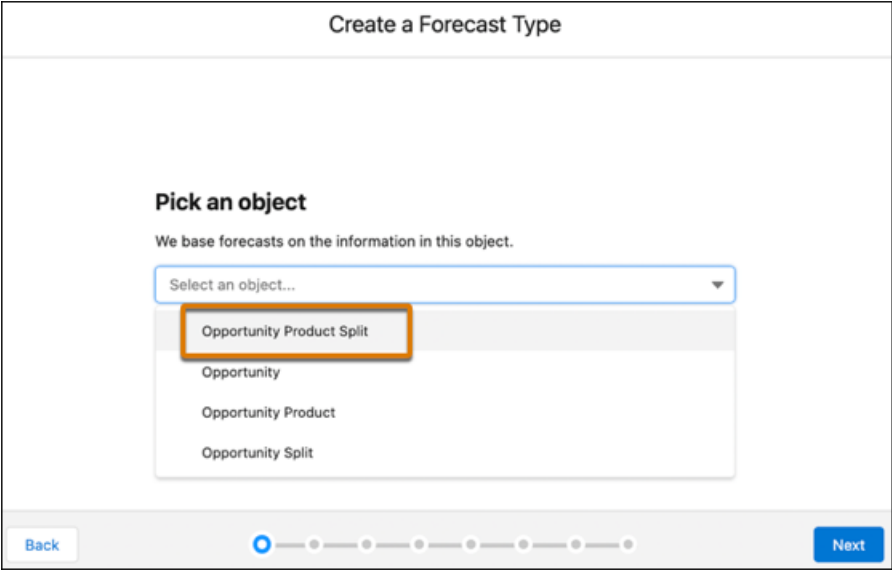
[Salesforce Help: Add Custom Columns That Include External Data to the Forecasts Page](#) (can be outdated or unavailable during release preview)

## Forecast on Opportunity Product Splits

If your sales team uses opportunity product splits to coordinate selling opportunities that include multiple products, create forecasts that show the split revenue across product families. Forecasting on the product split increases visibility into individual sales rep and product forecasts. Previously, you could forecast on opportunity splits.

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

**How:** Make sure that team selling and opportunity product split type are enabled. Then, create a forecast type that uses the Opportunity Product Split object.



The screenshot shows the 'Create a Forecast Type' interface. Under the heading 'Pick an object', there is a text prompt 'We base forecasts on the information in this object.' Below this is a dropdown menu labeled 'Select an object...'. The dropdown is open, showing four options: 'Opportunity Product Split' (which is highlighted with an orange border), 'Opportunity', 'Opportunity Product', and 'Opportunity Split'. At the bottom of the dialog, there is a 'Back' button on the left and a 'Next' button on the right, with a progress indicator in between.

Forecasts for opportunity product splits are grouped by product family and are available for user role-based forecasts. Einstein Forecasting isn't available for opportunity product split forecasts.

SEE ALSO:

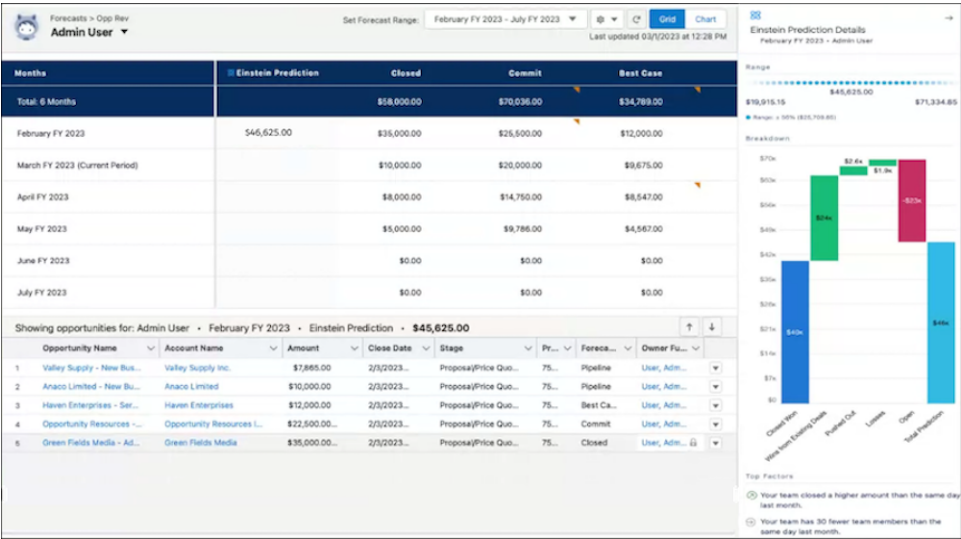
[Split Revenue by Product Mix with Opportunity Product Splits \(Generally Available\)](#)

## View Einstein Predictions in a Full-Length Panel

See more Einstein Prediction details at one time in a full, slide-out panel on the forecasts page. Previously, Einstein predictions were shown in a shortened panel with the introduction of forecasts pages in Lightning App Builder.

**Where:** This change applies to Lightning Experience with Sales Cloud Einstein, which is available in Performance and Unlimited editions and for an extra cost in Enterprise Edition.

**How:** If Einstein Forecasting is enabled, you're all set. To see the Einstein predictions in the full panel, select an Einstein Prediction cell on the forecasts page.

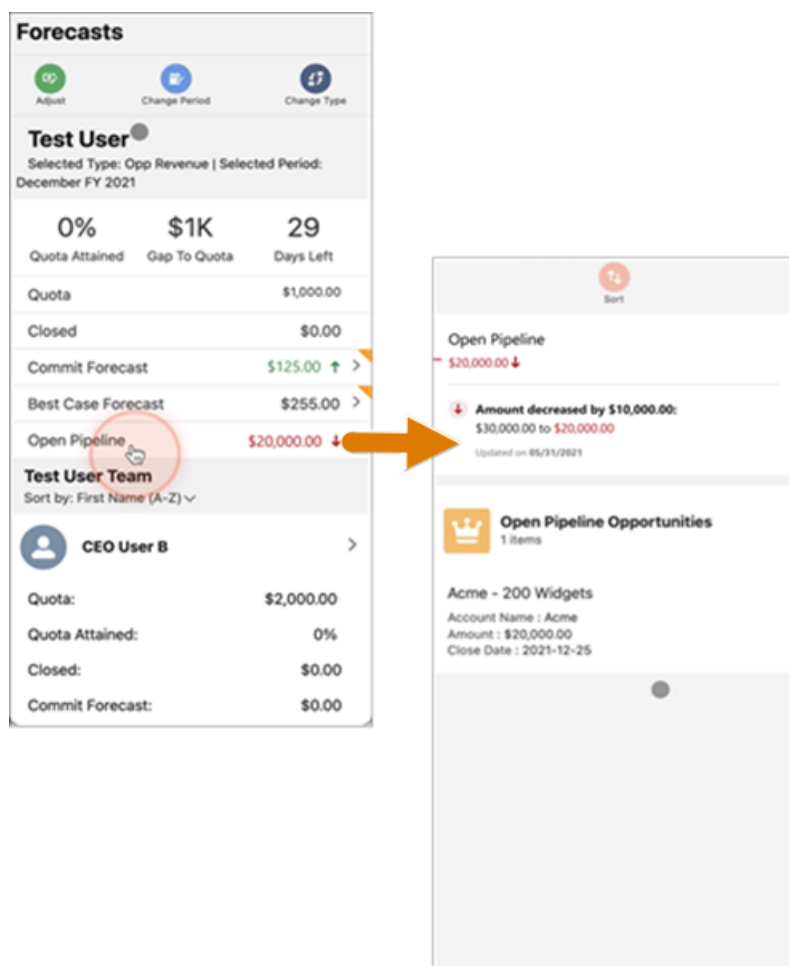


See Recent Forecast Changes in the Salesforce Mobile App

As a sales leader, you can see week-over-week forecast changes in the Salesforce mobile app so that you can adjust your sales strategies accordingly. Previously, recent forecast changes were available only on the desktop site.

**Where:** This change applies to all versions of the Salesforce mobile app in Professional, Performance, and Developer editions and in Enterprise and Unlimited editions with the Sales Cloud.

**How:** An arrow icon next to a forecast category indicates that it changed in the last 7 days. Tap the forecast to view more information about the change.



To enable recent changes, enable historical trending for forecasting items and verify that you received email confirmation that your historical trending data is ready. After the trending data is ready, on the desktop site, go to the forecasts page and click the gear in the upper right. Under Display Options, select **Show Changes in Last 7 Days**.

SEE ALSO:

[Salesforce Help: Adjust Forecasts in Collaborative Forecasts \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Set Up Historical Trend Reporting \(can be outdated or unavailable during release preview\)](#)

## Enablement for Sales Teams

Jump-start your sales teams with all the product and process knowledge needed to quickly open opportunities, close deals, and help achieve your company's revenue outcomes. New capabilities for building, assigning, and managing programs help your Enablement teams deliver more robust, timely, and job-specific resources for your sales teams in their flow of work.

## IN THIS SECTION:

[Find Out What's New for Enablement](#)

Create Enablement programs with more confidence by previewing what's in a specific program template, including new templates for specific revenue outcomes. Start using measures in programs more quickly with new predefined measures, including Einstein Conversation Insights call data. Assign programs to users more efficiently and gain deeper analytical insights into program performance.

## Find Out What's New for Enablement

Create Enablement programs with more confidence by previewing what's in a specific program template, including new templates for specific revenue outcomes. Start using measures in programs more quickly with new predefined measures, including Einstein Conversation Insights call data. Assign programs to users more efficiently and gain deeper analytical insights into program performance.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions with the Enablement add-on license.

## SEE ALSO:

[Enablement](#)

## Collaborate in Real Time with PRM for Slack App (Generally Available)

Bring internal teams and partners into one partner channel for streamlined collaboration and communications. Access, update and share records, and automate vital business processes, all within Slack. Partner Relationship Management (PRM) for Slack connects your sales teams, partners, and important data through partner portals so you can scale productivity and streamline communication.

**Where:** This change applies to Lightning Experience and all versions of the Salesforce mobile app in Enterprise and Unlimited editions. Slack customers must be running Slack Enterprise Grid.

**Why:** Make business processes like deal registration and lead distribution easier with business process automation built on Salesforce Flow and global actions. Search and post records directly from Salesforce in Slack to stay updated on deals. Create and manage partner channels in Lightning Experience to include all partners associated with an account automatically.

## IN THIS SECTION:

[PRM for Slack Features](#)

Learn more about the PRM for Slack app and how to get started.

## PRM for Slack Features

Learn more about the PRM for Slack app and how to get started.

- Collaborate in real time on Slack when you connect PRM for Slack to your Sales Cloud instance and your partner portal.
- Search and post records directly from Salesforce in Slack so you and your partners stay updated on opportunities.
- Devise and implement strategy with partners through the partner portal, using established Salesforce permissions.
- Create and manage partner channels in Lightning Experience to include all partners associated with an account automatically.
- Make deal registration and lead distribution easier with business process automation built on AI-powered insights, all from within Slack.

### EDITIONS

Available in: Lightning Experience with Salesforce for Slack Integrations Enabled

Available in: **Enterprise** and **Unlimited** Editions with Salesforce for Slack Integrations Enabled

Available in: Slack Enterprise Grid

## Sales Performance Management

Put the fun in sales planning when you collaborate among stakeholders at every stage in a central location with Sales Planning. Load data-intensive alignments quickly within Territory Planning. Engage prospects as a team using Enterprise Territory Management. And visualize utility service lines in Salesforce Maps.

### IN THIS SECTION:

#### [Sales Planning \(Generally Available\)](#)

Plan sales strategies continuously when you collaborate with stakeholders, allocate for optimal revenue targets and rep quotas, and design territories using a tree structure or a map. And prepare for compelling events and automate assignments through your entire sales hierarchy.

#### [Territory Planning](#)

Put updated alignments into action sooner when they take less time to load. Apply and preserve boundary unit assignments using address fields in Salesforce. And create assignment rules without running them.

#### [Enterprise Territory Management](#)

Encourage collaborative selling efforts among your reps when they identify other teammates assigned to their leads' territories. And continue managing areas of your territory model even while others run assignment rules for their respective areas.

#### [Salesforce Maps](#)

Identify and plan for utility line services easily when you add spans and their connections to routes directly from the map. Help reps meet goals by plotting multiple marker layers from a record with the click of a button. Update records directly from the plotted legend using mass actions. Identify and manage records with ease by selecting markers from the map.

#### [Salesforce Maps Advanced](#)

Create visit plans that optimize reps' schedules to meet customer visit requirements. Reduce planning effort and optimize routes when you set up visit plans that schedule as many customer visits as possible, without repeating visits to the same account.

#### [Apply Updates to Custom Permission Sets for Salesforce Maps Products](#)

Keep sales teams productive and prevent their loss of access to features they rely on. Apply security and other updates to custom permission sets for Salesforce Maps, Salesforce Maps Advanced, and Territory Planning.

## Sales Planning (Generally Available)

Plan sales strategies continuously when you collaborate with stakeholders, allocate for optimal revenue targets and rep quotas, and design territories using a tree structure or a map. And prepare for compelling events and automate assignments through your entire sales hierarchy.

### IN THIS SECTION:

[Plan Sales Strategies as a Team](#)

Take the chore out of planning when you design your company's sales strategy in a central location with input from the right stakeholders. Owners evaluate sales plans for the best possible outcomes to keep your sales teams in front of fast-changing conditions.

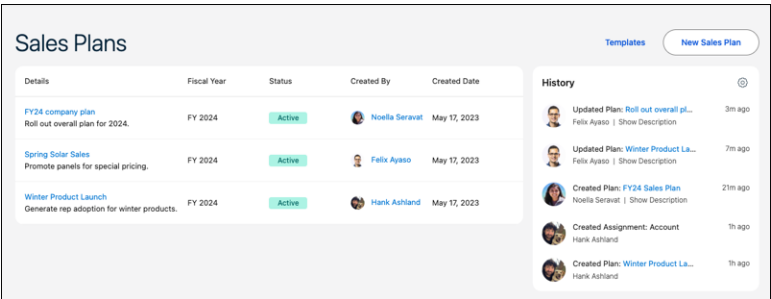
### Plan Sales Strategies as a Team

Take the chore out of planning when you design your company's sales strategy in a central location with input from the right stakeholders. Owners evaluate sales plans for the best possible outcomes to keep your sales teams in front of fast-changing conditions.

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

**When:** July 18, 2023

**Why:** Sales Planning promotes ownership, visibility, and accountability. Combinations of top-down and bottom-up methodologies provide flexibility that supports multiple business units with differing complexities.



Sales Planning reduces the pain of typical sales operations tasks. Specifically, it simplifies:

- Collaboration among your plan's owners and stakeholders within a hierarchical structure
- Allocations for planning revenue targets and rep quotas
- Territory design using a map or a tree structure
- Continuous planning for compelling events such as product launches and economic headwinds
- Segmentation using any combination of automated and manual assignments through all levels of your hierarchical structure

### SEE ALSO:

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

## Territory Planning

Put updated alignments into action sooner when they take less time to load. Apply and preserve boundary unit assignments using address fields in Salesforce. And create assignment rules without running them.



## IN THIS SECTION:

[Update Large Territory Models in Less Time](#)

Adjust territories and assignments anytime without worrying about how long it's going to take. Confidently update data more frequently by initiating streamlined processes that save time when you import CSV files. Reduce loading times for updating and optimizing alignments when you set up Territory Planning to process data in parallel.

[Assign Units Using Boundaries That You Define](#)

Keep unit assignments consistent across Salesforce, Territory Planning, and Enterprise Territory Management. Assign units to boundary and country fields, such as billing postal code and billing country when creating datasets. Territory Planning matches your selected fields so your unit assignments remain intact throughout the planning process.

[Other Improvements in Territory Planning](#)

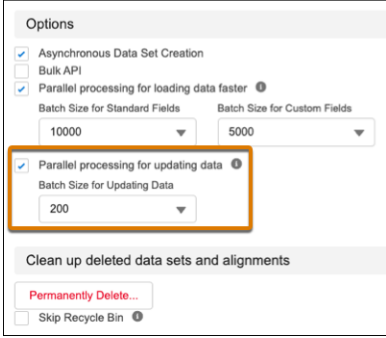
Personalize the home screen to fit the way you work by sorting alignment and dataset lists. Choose when assignment rules run. And get a list view of unit assignments by adding boundaries to the Selection Details table.

## Update Large Territory Models in Less Time

Adjust territories and assignments anytime without worrying about how long it's going to take. Confidently update data more frequently by initiating streamlined processes that save time when you import CSV files. Reduce loading times for updating and optimizing alignments when you set up 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 for updating from Territory Planning data management options. You can adjust batch size to decrease the number of records for quicker updates.



The screenshot shows the 'Options' section of the Salesforce Maps configuration. It includes several checkboxes and dropdown menus. The 'Parallel processing for updating data' checkbox is checked and highlighted with an orange box. Below it, the 'Batch Size for Updating Data' dropdown is set to '200'. Other options include 'Asynchronous Data Set Creation' (checked), 'Bulk API' (unchecked), 'Parallel processing for loading data faster' (checked), 'Batch Size for Standard Fields' (10000), and 'Batch Size for Custom Fields' (5000). At the bottom, there is a 'Clean up deleted data sets and alignments' section with a 'Permanently Delete...' button and a 'Skip Recycle Bin' checkbox.

## SEE ALSO:

[Salesforce Help: Load Datasets and Alignments Efficiently \(can be outdated or unavailable during release preview\)](#)

## Assign Units Using Boundaries That You Define

Keep unit assignments consistent across Salesforce, Territory Planning, and Enterprise Territory Management. Assign units to boundary and country fields, such as billing postal code and billing country when creating datasets. Territory Planning matches your selected fields so your unit assignments remain intact throughout the planning process.

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

**How:** In Setup, choose **Configure** next to Salesforce Maps. Enable the option to assign units based on address fields in Salesforce from Territory Planning data management.

**Options**

- ☒ Asynchronous Data Set Creation
- ☐ Bulk API
- ☒ Assign units to boundaries based on address fields in Salesforce
- ☒ Parallel processing for loading data faster
- Batch Size for Standard Fields: 10000
- Batch Size for Custom Fields: 5000
- ☐ Parallel processing for updating data
- Batch Size for Updating Data: 200

Select the boundary and country fields you want units assigned to.

**Create Dataset**

**Configure Territory Planning: Accounts**  
Specify the attributes for your territory assignment.

Unit Type Name: Accounts

Unit ID Field: Account ID

Unit Assignment Field: Select an Option

Import Object Fields: ☐

Unit Name Field: Account Name

Boundary Field: Billing Zip/Postal Code

Country Field: Billing Country

Billing Latitude:

Billing Longitude:

Previous Cancel Finish

SEE ALSO:

[Salesforce Help: Allow Assignments to Boundary and Country Fields \(can be outdated or unavailable during release preview\)](#)

## Other Improvements in Territory Planning

Personalize the home screen to fit the way you work by sorting alignment and dataset lists. Choose when assignment rules run. And get a list view of unit assignments by adding boundaries to the Selection Details table.

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

**Why:** Territory Planning users can now:

- Sort dataset and alignment lists in the order that's most useful, such as alphabetical by name or last modified date.
- Add assignment rules without running them and committing to any changes. For example, save a rule that keeps account assignments intact when publishing to Enterprise Territory Management.
- Quickly see what postal code, county, state, or country a unit belongs to by including boundaries in alignment selection details.

## Enterprise Territory Management

Encourage collaborative selling efforts among your reps when they identify other teammates assigned to their leads' territories. And continue managing areas of your territory model even while others run assignment rules for their respective areas.

IN THIS SECTION:

### [Work as a Team to Win Over Leads](#)

Increase the chances of engaging prospects when your reps work together on leads by identifying shared territory assignments using Enterprise Territory Management.

Manage Your Territories While Others Run Rules for Theirs

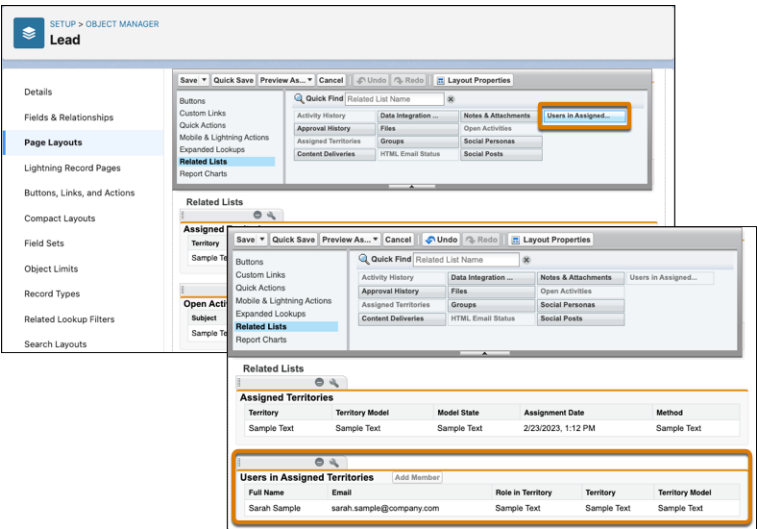
Fine-tune areas in your territory model while others run assignment rules for their respective areas using Enterprise Territory Management. Now, only affected areas of the model remain locked instead of the entire model.

Work as a Team to Win Over Leads

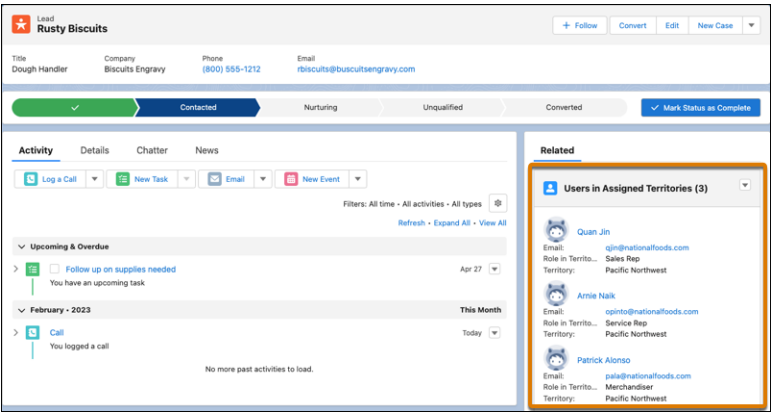
Increase the chances of engaging prospects when your reps work together on leads by identifying shared territory assignments using Enterprise Territory Management.

**Where:** This change applies to Lightning Experience and Salesforce Classic in Performance and Developer editions and in Enterprise and Unlimited editions with the Sales Cloud.

**How:** From the object manager settings for leads, open page layouts. Then add the Users in Assigned Territories related list.



Reps assigned to a lead's territories appear in lead details.



SEE ALSO:

[Salesforce Help: Show Your Reps Other Users Assigned to Their Leads' Territories](#) (can be outdated or unavailable during release preview)

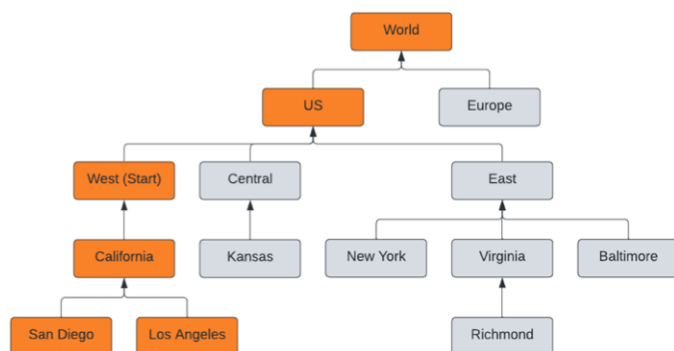
## Manage Your Territories While Others Run Rules for Theirs

Fine-tune areas in your territory model while others run assignment rules for their respective areas using Enterprise Territory Management. Now, only affected areas of the model remain locked instead of the entire model.

**Where:** This change applies to Lightning Experience and Salesforce Classic in Performance and Developer editions and in Enterprise and Unlimited editions with the Sales Cloud.

**How:** When others run assignment rules for a specific territory, that territory along with its ancestors and descendants lock until assignment rules finish running. Any territories unaffected by running assignment rules now remain unlocked.

In this example, a fellow manager runs assignment rules for the West territory. That territory, its ancestors US and World, and its descendants California, San Diego, and Los Angeles lock for as long as those assignment rules run. But while those assignment rules run, you can continue to manage all other territories, except run assignment rules for them.



## Salesforce Maps

Identify and plan for utility line services easily when you add spans and their connections to routes directly from the map. Help reps meet goals by plotting multiple marker layers from a record with the click of a button. Update records directly from the plotted legend using mass actions. Identify and manage records with ease by selecting markers from the map.

### IN THIS SECTION:

#### [Manage Utility Service Lines from the Map](#)

Plot spans that visualize records' polylines in Salesforce Maps. Select those records when planning work, such as trimming a tree that's interfering with transmission lines. Then use mass actions to add the line and tree's location to a route for your service team. Previously, you viewed records without seeing their connections and points.

#### [Visualize and Manage Selected Markers](#)

Keep records current as your company grows and changes. Update account owners and add leads to campaigns for specific records. Select exactly what records you want to work with and see them highlighted on the map in Salesforce Maps. As you choose markers directly from the map, they're added to the legend where you can define their appearance and apply mass actions.

#### [Plot Records from Salesforce and Show Other Relevant Ones Using Dynamic Filters](#)

Give your reps added context when they map records. You determine which marker layers appear so that your reps identify nearby sales and service opportunities directly in Salesforce Maps. Dynamic filters simplify the mapping process for your reps because they're no longer required to enter any field values for plotting their records.

### Apply Mass Actions from the Marker Legend

Quickly update your records, schedules, and campaigns by accessing mass actions directly from the plotted legend in Salesforce Maps. Take advantage of the legend layout to easily select specific records in marker and polyline layers without filtering down from a marker on the map or in a list view. Marker colors and shapes are updated immediately after you initiate single or mass action changes.

### Remove Salesforce Maps Headers and Buttons from Custom Actions Windows

Show headers and buttons from Lightning web components and screen flows in custom actions without the standard, redundant ones from Salesforce Maps.

### Set ArcGIS Layers to Plot When Reps Open Salesforce Maps

Help reps manage sales and service work efficiently when they access geographic demographics as soon as they plot records in Salesforce Maps. You set up particular ArcGIS layers to display based on reps' areas of responsibility. Quick access to geographic analytics helps reps focus on daily tasks such as determining the best location for a new bank branch. And this change makes it easier for reps to react quickly to compelling events such as power outages.

### Add Predefined Fields That Appear in Scheduled Events

Give your reps added context in calendar events created from scheduling customer visits in Salesforce Maps. Specify which fields appear and set their fixed values based on requirements from sales management and operations.

### Basemap for Nearby Maps was Changed

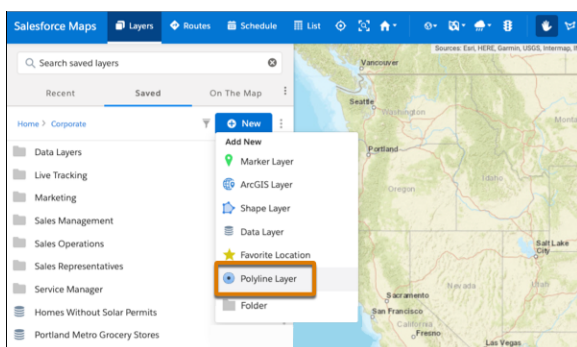
Identify what's nearby on Salesforce records using a Salesforce Maps basemap from Esri. Previous releases showed basemaps from HERE.

## Manage Utility Service Lines from the Map

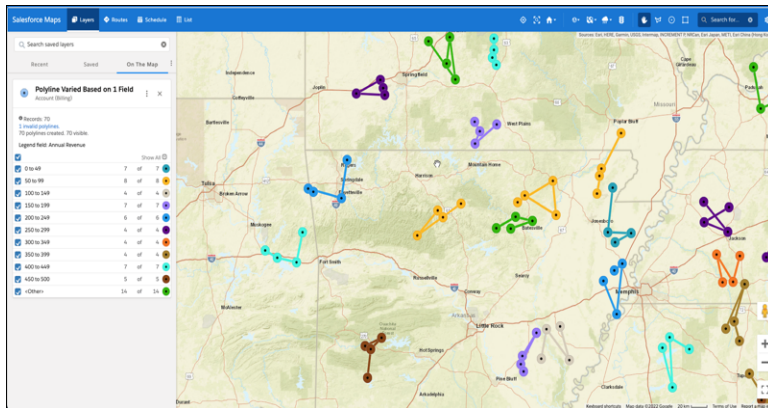
Plot spans that visualize records' polylines in Salesforce Maps. Select those records when planning work, such as trimming a tree that's interfering with transmission lines. Then use mass actions to add the line and tree's location to a route for your service team. Previously, you viewed records without seeing their connections and points.

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

**How:** After enabling polyline layers under the Layers setting in your permission group, create them from the Layers tab in Salesforce Maps. Add filters that determine which polylines show up on the map such as accounts in certain states or area codes.



Customize polyline colors so the filter values are easily discernible, and control how many polylines appear on the map.



SEE ALSO:

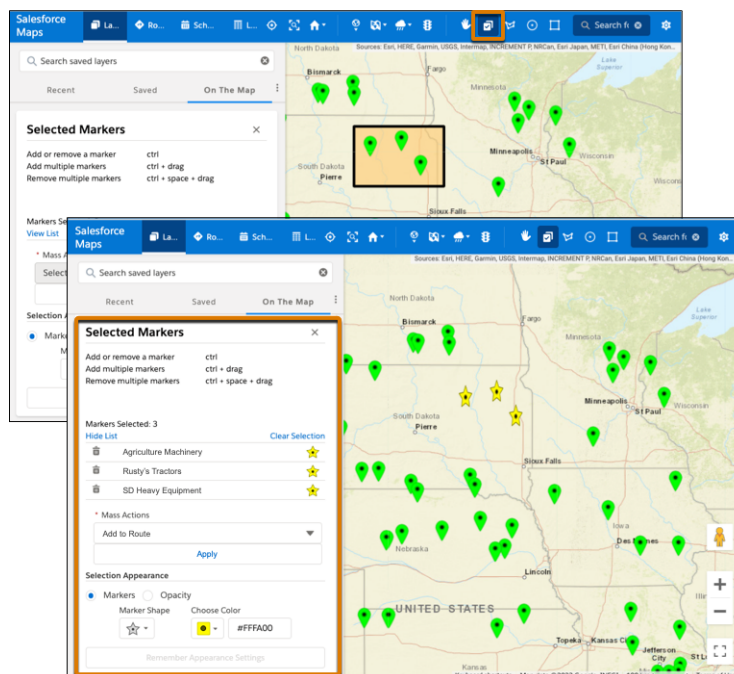
[Salesforce Help: Create Polyline Layers \(can be outdated or unavailable during release preview\)](#)

## Visualize and Manage Selected Markers

Keep records current as your company grows and changes. Update account owners and add leads to campaigns for specific records. Select exactly what records you want to work with and see them highlighted on the map in Salesforce Maps. As you choose markers directly from the map, they're added to the legend where you can define their appearance and apply mass actions.

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

**How:** From marker layers or polyline layers, use the new select markers feature to grab markers on the map. Add or remove markers from your selection with familiar Ctrl keyboard shortcuts. Then, from the marker list in the legend, configure style and color, or configure opacity to identify selected and unselected markers.



SEE ALSO:

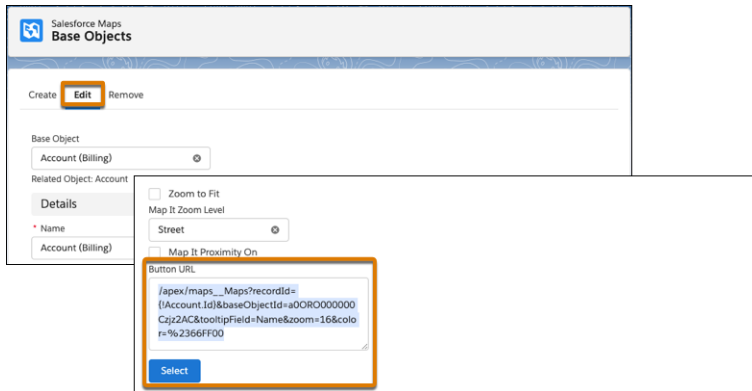
[Salesforce Help: Visualize and Set the Focus for Records That Require Attention](#) (can be outdated or unavailable during release preview)

## Plot Records from Salesforce and Show Other Relevant Ones Using Dynamic Filters

Give your reps added context when they map records. You determine which marker layers appear so that your reps identify nearby sales and service opportunities directly in Salesforce Maps. Dynamic filters simplify the mapping process for your reps because they're no longer required to enter any field values for plotting their records.

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

**How:** Select the Button URL from your base object and set up a new Map It button on a record to plot specific marker layers. For marker layers that require field values in order to plot, prefill those values with dynamic filters. To hide the filter popup that appears before plotting or to disable marker layers from plotting on load, simply add those parameters to the URL.



SEE ALSO:

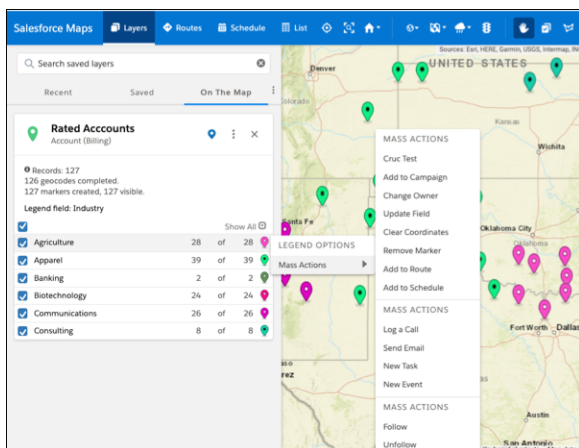
[Salesforce Help: Include Dynamic Context Relevant to Plotted Salesforce Records \(can be outdated or unavailable during release preview\)](#)

## Apply Mass Actions from the Marker Legend

Quickly update your records, schedules, and campaigns by accessing mass actions directly from the plotted legend in Salesforce Maps. Take advantage of the legend layout to easily select specific records in marker and polyline layers without filtering down from a marker on the map or in a list view. Marker colors and shapes are updated immediately after you initiate single or mass action changes.

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

**How:** To access mass actions from the plotted legend, right-click on a marker row. The row you click is highlighted for easy identification. Actions you take on that marker apply to all records included within it.



SEE ALSO:

[Salesforce Help: Plan Visits and Perform Actions for Multiple Records Simultaneously \(can be outdated or unavailable during release preview\)](#)

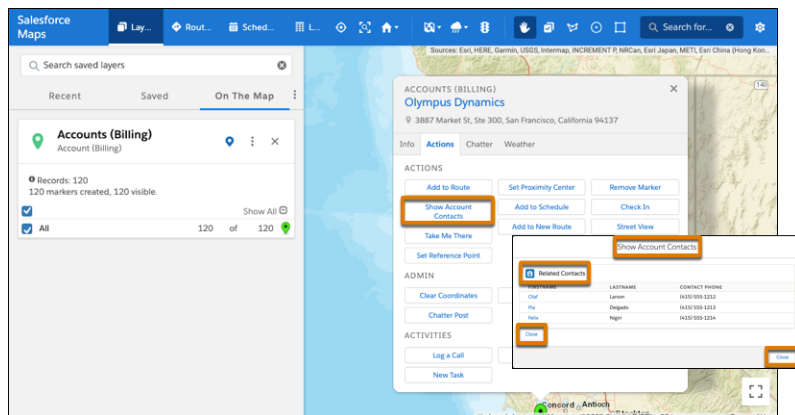
## Remove Salesforce Maps Headers and Buttons from Custom Actions Windows

Show headers and buttons from Lightning web components and screen flows in custom actions without the standard, redundant ones from Salesforce Maps.

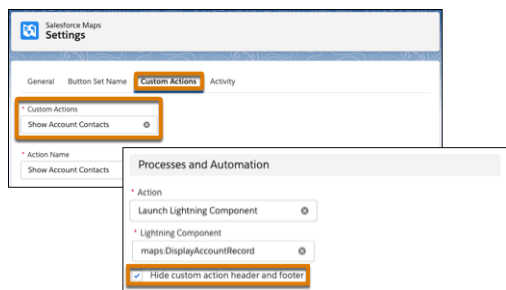


**Where:** This change applies to Lightning Experience and Salesforce Classic in Professional, Enterprise, Unlimited, and Developer editions.

**Why:** When your custom actions include Lightning web components or screen flows, their headers and buttons appear, too. For example, your rep selects the custom action **Show Account Contacts**, which includes a Lightning web component that lists the account's related contacts. The custom action window appears with titles and buttons from the Lightning web component and Salesforce Maps.



**How:** To remove standard Salesforce Maps headers and close buttons, open Salesforce Maps Settings. Select **Custom Actions** and then the action that you're changing. Next, select **Hide custom action header and footer**, and then save your changes.



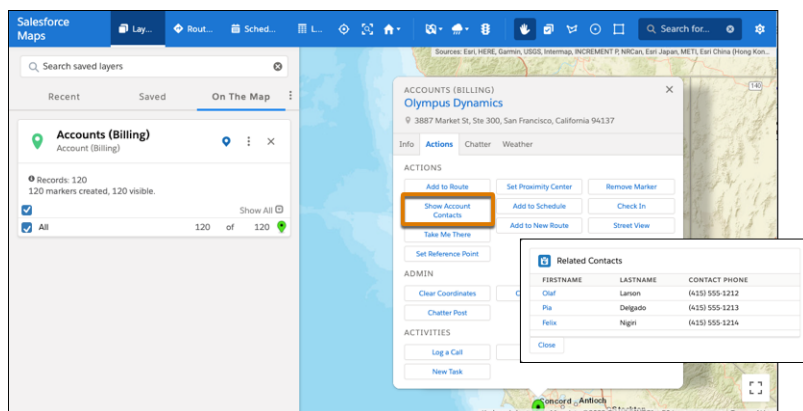
To configure the close button that appears as part of your Lightning web component within the custom actions window, add this attribute to your component's code.

```
<aura:attribute name="MapsCloseAction" type="Aura.action"/>
```

Then, add this logic to the component's JavaScript controller.

```
const MapsCloseAction = component.get("v.MapsCloseAction");$A.enqueueAction(MapsCloseAction);
```

The custom action window appears without the standard Salesforce Maps title and close button.



## SEE ALSO:

[Salesforce Help: Configure Custom Actions That Include Lightning Web Components and Flows \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Configure Custom Actions That Include Lightning Web Components and Flows \(can be outdated or unavailable during release preview\)](#)

## Set ArcGIS Layers to Plot When Reps Open Salesforce Maps

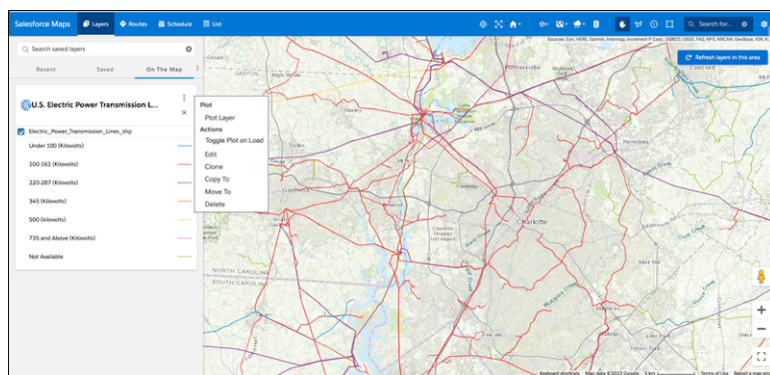
Help reps manage sales and service work efficiently when they access geographic demographics as soon as they plot records in Salesforce Maps. You set up particular ArcGIS layers to display based on reps' areas of responsibility. Quick access to geographic analytics helps reps focus on daily tasks such as determining the best location for a new bank branch. And this change makes it easier for reps to react quickly to compelling events such as power outages.

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

**How:** Enable ArcGIS layers under the Layers setting in your permission group and then add one or more ArcGIS layers to Plot on Load Layers.

Layers	
Setting	Value
Maximum Records to Plot	50000
Maximum number of records to plot for External Objects	2000
Folder Administrator	✓
Show User Folders	✓
Show Personal Folders	✓
Enable ArcGIS Layers	✓
Enable Polyline Layers	✓
Manage Data Layers	✓
Manage Data Sources	✓
Manage Territory Layers	✓
Plot on Load Layers	U.S. Electric Power Transmission L

It's easy to turn on and off plot on load for a specific layer from that layer's options in the legend.



SEE ALSO:

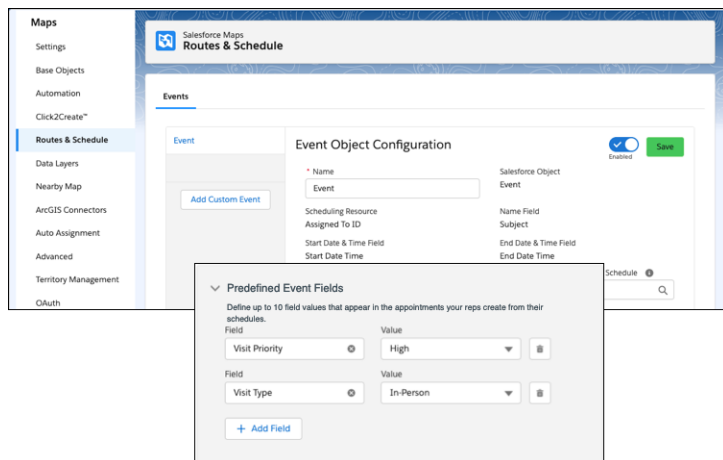
[Salesforce Help: Plot Specific Layers for Reps when They Start Sessions](#) (can be outdated or unavailable during release preview)

## Add Predefined Fields That Appear in Scheduled Events

Give your reps added context in calendar events created from scheduling customer visits in Salesforce Maps. Specify which fields appear and set their fixed values based on requirements from sales management and operations.

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

**How:** In Salesforce Maps Settings, select **Routes & Schedule**. Then select the standard or custom fields that you want to appear on your reps' calendar events. For example, set the visit priority and the visit type for events created from your reps scheduling customer visits.



## Basemap for Nearby Maps was Changed

Identify what's nearby on Salesforce records using a Salesforce Maps basemap from Esri. Previous releases showed basemaps from HERE.

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

## Salesforce Maps Advanced

Create visit plans that optimize reps' schedules to meet customer visit requirements. Reduce planning effort and optimize routes when you set up visit plans that schedule as many customer visits as possible, without repeating visits to the same account.

## IN THIS SECTION:

[Simplify Reps' Schedules by Eliminating Repeat Visits During Shifts](#)

Help reps adhere to visit spacing requirements by ensuring they visit customers one time during their shift in Salesforce Maps Advanced. Preventing same shift visits is especially helpful for large volumes of accounts that require frequent visits. For example, a customer requires daily visits, but the rep travels 2 days a week. This option schedules the rep to visit one time on each of those 2 days instead of scheduling multiple visits to that same customer on each of those 2 days.

**Simplify Reps' Schedules by Eliminating Repeat Visits During Shifts**

Help reps adhere to visit spacing requirements by ensuring they visit customers one time during their shift in Salesforce Maps Advanced. Preventing same shift visits is especially helpful for large volumes of accounts that require frequent visits. For example, a customer requires daily visits, but the rep travels 2 days a week. This option schedules the rep to visit one time on each of those 2 days instead of scheduling multiple visits to that same customer on each of those 2 days.

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

**How:** Select the option to prevent same shift visits under Set Additional Options when you edit visit plans. The option is selected by default for new visit plans starting in Summer '23.

## SEE ALSO:

[Salesforce Help: Specify Visit and Optimization Parameters \(can be outdated or unavailable during release preview\)](#)

**Apply Updates to Custom Permission Sets for Salesforce Maps Products**

Keep sales teams productive and prevent their loss of access to features they rely on. Apply security and other updates to custom permission sets for Salesforce Maps, Salesforce Maps Advanced, and Territory Planning.

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

**Why:** Salesforce provides details about updates that appear in default permission sets. If you manage custom permission sets for teams who use Salesforce Maps products, it's important that you apply the same updates to those permission sets. That way, your sales and service teammates maintain access to those products without interruption to their productivity.

**How:** Updates can require that you change permissions for specific fields, Apex classes, and Visualforce pages.

## SEE ALSO:

[Knowledge Article: Updates to Include in Custom Permission Sets for Salesforce Maps Products \(can be outdated or unavailable during release preview\)](#)

## Sales Cloud Einstein

Let Einstein GPT draft sales emails from a sales rep's inbox or anywhere in Salesforce. Monitor changes to Einstein Forecasting predictions with a new chart that shows a prediction trend line across periods. Get ready to bid farewell to Account Insights and Opportunity Insights, which are being retired.

### IN THIS SECTION:

#### [Personalize Sales Emails with Einstein GPT for Sales](#)

Sales Emails empowers busy sales reps to move quickly and expand deals through personalized and informed email content that buyers love. Einstein GPT uses your sales data to generate personalized emails for contacts and leads, a method known as grounding. Sales reps can draft common emails, like a follow-up or a meeting invite, by choosing from the preset email prompt types.

#### [See an Enhanced Prediction Trends Graph](#)

The Einstein Forecasting Prediction Graph available on the forecasts page now shows the new Forecast Changes chart, which includes the Einstein prediction line. The new chart shows the changes to the current period's forecasts and measures how this period's forecasts compares to past periods, including the Einstein prediction.

#### [Einstein Account Insights and Opportunity Insights Are Being Retired](#)

Einstein Account Insights and Einstein Opportunity Insights are being retired in all Salesforce orgs as of Summer '23 on August 16, 2023. Salesforce is focusing development efforts on features such as Pipeline Inspection and Einstein Relationship Insights.

### SEE ALSO:

[Einstein Release Notes](#)

## Personalize Sales Emails with Einstein GPT for Sales

Sales Emails empowers busy sales reps to move quickly and expand deals through personalized and informed email content that buyers love. Einstein GPT uses your sales data to generate personalized emails for contacts and leads, a method known as grounding. Sales reps can draft common emails, like a follow-up or a meeting invite, by choosing from the preset email prompt types.

**Where:** This feature is available in Lightning Experience in Performance and Unlimited editions.

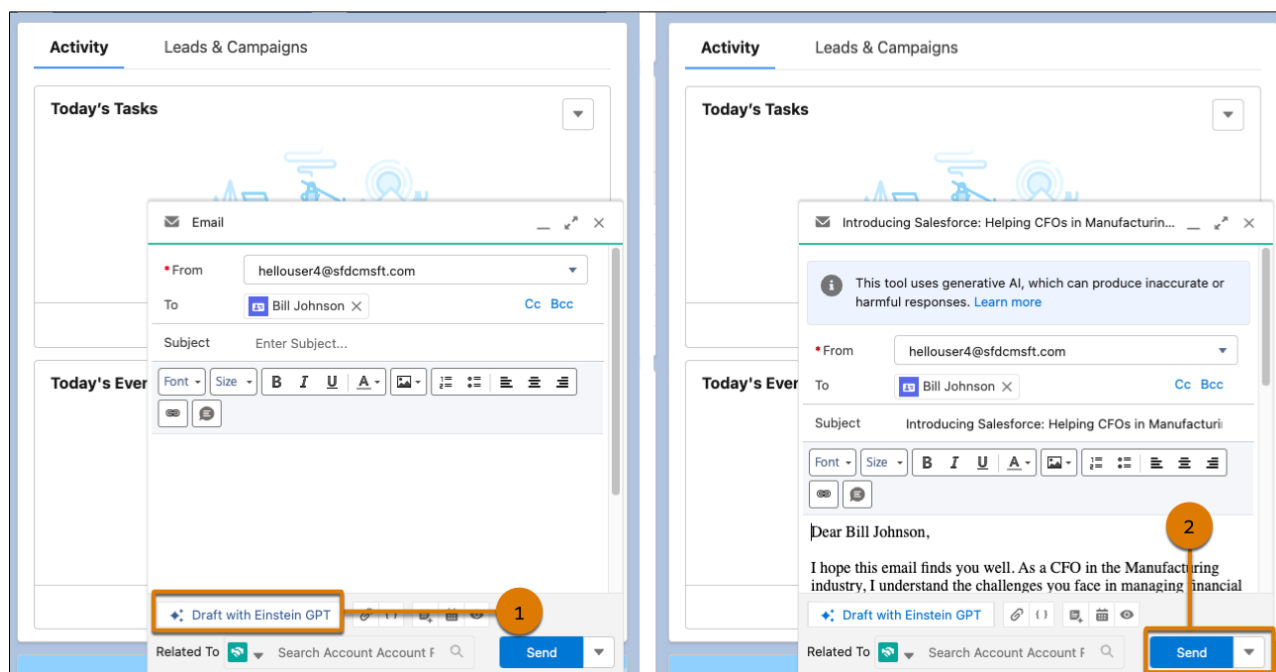
**Who:** To use Sales Emails, users need the Einstein GPT Sales Emails permission set. To let reps access the feature in Gmail or Outlook, set up the Gmail or Outlook integrations.

**Why:** Generative AI and large language models (LLMs) are the current talk of the town. But you need assurances that AI output is trustworthy and accurate. You can rely on Salesforce to uphold our #1 value, trust, and treat your data with care and security at the forefront.

**How:** To purchase Einstein GPT for Sales, contact your Salesforce account executive.

In Lightning Experience, Einstein GPT Sales Emails is built directly into the email composer. In Salesforce Outlook or Gmail integrations, users see Einstein GPT in the email application pane.

Choose a prompt from the list (1). Review and edit the email, then send it (2).



SEE ALSO:

[Salesforce Help: Trusted Generative AI](#)

[Salesforce Help: Understand How Einstein GPT Creates Sales Emails](#)

## See an Enhanced Prediction Trends Graph

The Einstein Forecasting Prediction Graph available on the forecasts page now shows the new Forecast Changes chart, which includes the Einstein prediction line. The new chart shows the changes to the current period's forecasts and measures how this period's forecasts compares to past periods, including the Einstein prediction.

**Where:** This change applies to Lightning Experience with Sales Cloud Einstein, which is available in Performance and Unlimited editions, and for an extra cost in Enterprise Edition.

SEE ALSO:

[Assess the Health of Your Sales Forecasts with Built-In Charts](#)

## Einstein Account Insights and Opportunity Insights Are Being Retired

Einstein Account Insights and Einstein Opportunity Insights are being retired in all Salesforce orgs as of Summer '23 on August 16, 2023. Salesforce is focusing development efforts on features such as Pipeline Inspection and Einstein Relationship Insights.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Performance editions with the Sales Cloud Einstein add-on.

After August 16, 2023, Einstein Opportunity Insights and Einstein Account Insights won't be available. For more information, see [Einstein Opportunity Insights Retirement](#) and [Einstein Account Insights Retirement](#).

SEE ALSO:

[Pipeline Inspection](#)

[Knowledge Article: Einstein Opportunity Insights Retirement](#)

[Knowledge Article: Einstein Account Insights Retirement](#)

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

[Salesforce Help: Einstein Relationship Insights for Admins \(can be outdated or unavailable during release preview\)](#)

## Integration with Other Products

Updates to Einstein Activity Capture resolve connected account issues, simplify your setup experience, and track email and event updates. Use the Salesforce Chrome extension to work with records and the To Do List, and view engagement alerts.

IN THIS SECTION:

[Einstein Activity Capture](#)

Quickly resolve connected account issues, simplify your setup experience, and track email and event updates.

[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.

[Gmail Integration](#)

Use the Salesforce Chrome extension to create and update records, manage the To Do List, and view engagement alerts.

## Einstein Activity Capture

Quickly resolve connected account issues, simplify your setup experience, and track email and event updates.

IN THIS SECTION:

[Fix Connection Issues Easily with Status Reasons](#)

Quickly resolve your reps' email and calendar connection issues with detailed status reasons. If a rep's connected account's status is Needs Attention, you see details about the connection issue and ways to fix it on the User Status page.

[Get More Control Over What Data Is Captured](#)

Einstein Activity Capture configurations define how data flows between Salesforce and your reps' connected accounts. If you start using Einstein Activity Capture in Summer '23 or later, only users in an active configuration can capture emails and events using Einstein Activity Capture.

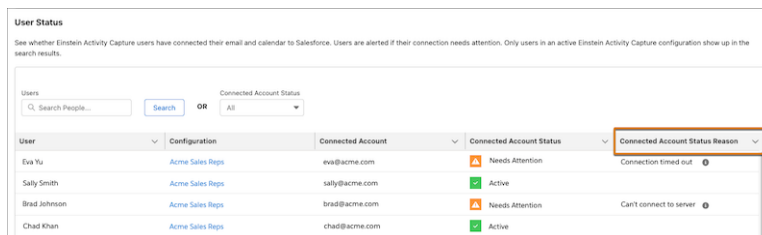
[Gain More Visibility with Data Capture Metrics](#)

See the last time that Einstein Activity Capture or Inbox captured email and event data on the User Status page. When any configured user's data is captured, the last data capture timestamps are updated. You no longer see the total number of captured activities on the User Status page.

## Fix Connection Issues Easily with Status Reasons

Quickly resolve your reps' email and calendar connection issues with detailed status reasons. If a rep's connected account's status is Needs Attention, you see details about the connection issue and ways to fix it on the User Status page.

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



User	Configuration	Connected Account	Connected Account Status	Connected Account Status Reason
Eva Yu	Acme Sales Reps	eva@acme.com	Needs Attention	Connection timed out
Sally Smith	Acme Sales Reps	sally@acme.com	Active	
Brad Johnson	Acme Sales Reps	brad@acme.com	Needs Attention	Can't connect to server
Chad Khan	Acme Sales Reps	chad@acme.com	Active	

SEE ALSO:

[Salesforce Help: Check Connection Status and Metrics for Einstein Activity Capture Users \(can be outdated or unavailable during release preview\)](#)

## Get More Control Over What Data Is Captured

Einstein Activity Capture configurations define how data flows between Salesforce and your reps' connected accounts. If you start using Einstein Activity Capture in Summer '23 or later, only users in an active configuration can capture emails and events using Einstein Activity Capture.

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

**How:** From the Einstein Activity Capture settings page, add your reps to a configuration with emails or events enabled.

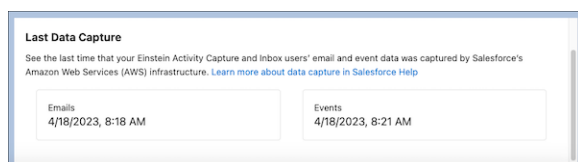
SEE ALSO:

[Salesforce Help: Create a Configuration for Einstein Activity Capture \(can be outdated or unavailable during release preview\)](#)

## Gain More Visibility with Data Capture Metrics

See the last time that Einstein Activity Capture or Inbox captured email and event data on the User Status page. When any configured user's data is captured, the last data capture timestamps are updated. You no longer see the total number of captured activities on the User Status page.

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



Last Data Capture	
See the last time that your Einstein Activity Capture and Inbox users' email and event data was captured by Salesforce's Amazon Web Services (AWS) infrastructure. <a href="#">Learn more about data capture in Salesforce Help</a>	
Emails 4/18/2023, 8:18 AM	Events 4/18/2023, 8:21 AM

SEE ALSO:

[Salesforce Help: Data Retention for Einstein Activity Capture and Inbox \(can be outdated or unavailable during release preview\)](#)



## 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.

### IN THIS SECTION:

#### [Salesforce for Outlook Is Retiring in June 2024](#)

Full product retirement for Salesforce for Outlook is scheduled for June 2024. For the latest integration with Microsoft Outlook, we recommend moving to our next-generation products, the Outlook integration and Einstein Activity Capture. These products replace Salesforce for Outlook features and give users new capabilities. We continue to introduce enhancements for these products every release.

## 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. These products replace Salesforce for Outlook features and give users new capabilities. We continue to introduce enhancements for these products every release.

**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.

### 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](#)

## Gmail Integration

Use the Salesforce Chrome extension to create and update records, manage the To Do List, and view engagement alerts.

### IN THIS SECTION:

#### [Save Time by Using Salesforce in a Side Panel While Browsing the Web in Chrome](#)

Salesforce Chrome extension users can now work with their To Do List, view engagement alerts in their Feed, create records, and edit multiple records in a new workspace in the extension panel while viewing the web. Previously, the extension provided only Gmail integration features.

## Save Time by Using Salesforce in a Side Panel While Browsing the Web in Chrome

Salesforce Chrome extension users can now work with their To Do List, view engagement alerts in their Feed, create records, and edit multiple records in a new workspace in the extension panel while viewing the web. Previously, the extension provided only Gmail integration features.

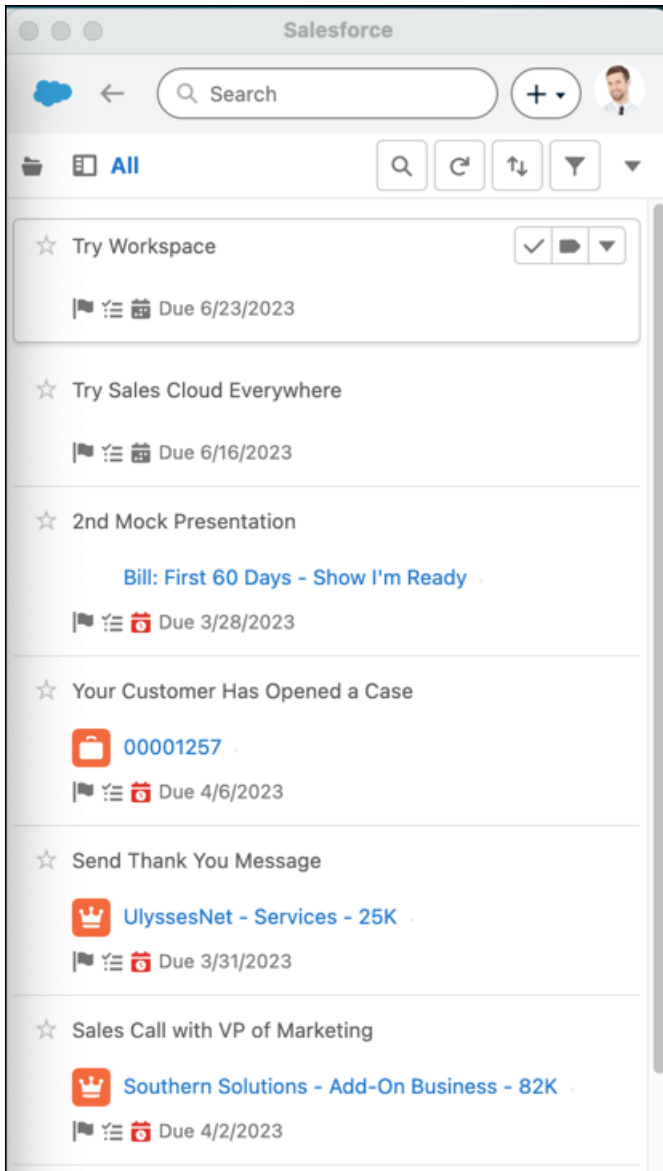
**Where:** This change applies to Lightning Experience and Salesforce Classic in Essentials, Professional, Enterprise, Unlimited, and Developer editions.

The new Workspace is a beta feature.

**Why:** Four additional features are now available in the Chrome extension.

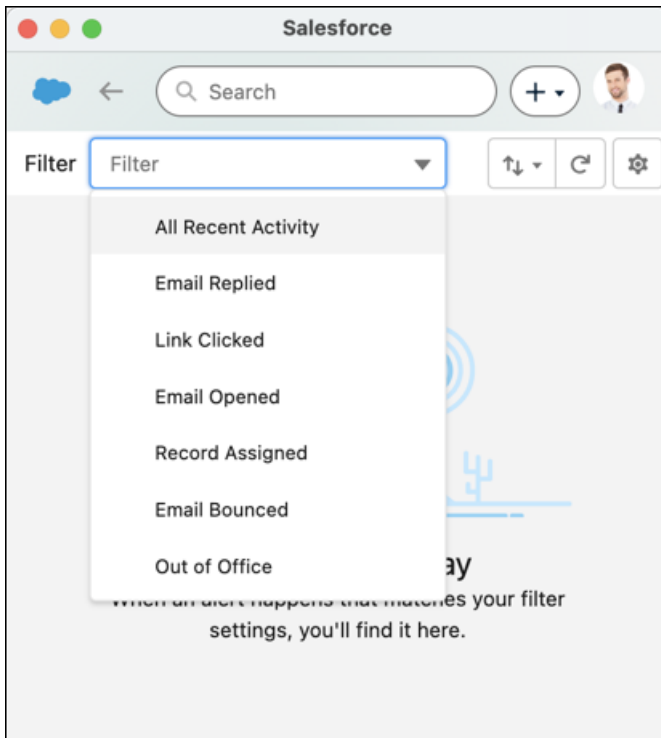
### To Do List

With the To Do List, users can view, filter, sort, search, and complete their pending tasks within the extension panel. Users can view any web page at the same time, letting them view relevant information outside of Salesforce while prioritizing and completing their tasks.



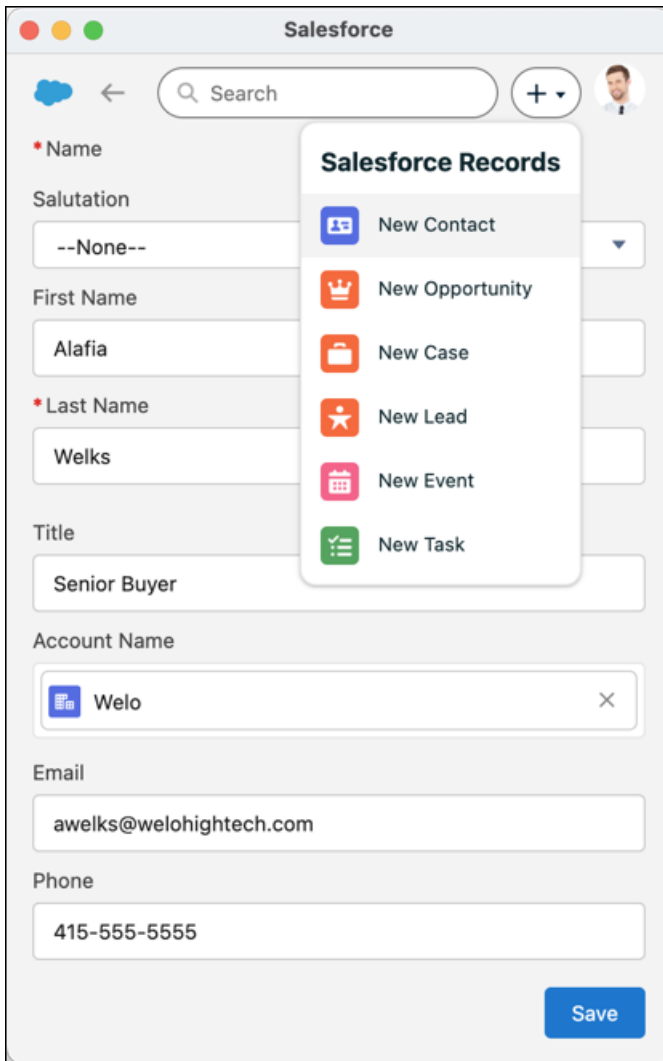
### The Feed

With the Feed, users can see all their recent engagement alerts while viewing web pages. Reps can review the history of notifications in the Feed and pick the right moment to reach out. For example, if a sales rep is looking up prospect information on the web, and they get a notification in the side panel, they can quickly shift their attention to the engaged prospect without switching tabs.



### Record Creation

Users can create records efficiently in the extension panel while viewing relevant information on the web. For example, when a user identifies a prospect on a company's web page, they can create the lead record in the extension panel while viewing the prospect's information on the web.



The screenshot shows the Salesforce 'New Record' modal. The background is a form for creating a new contact. The modal is titled 'Salesforce Records' and lists six options: 'New Contact' (selected), 'New Opportunity', 'New Case', 'New Lead', 'New Event', and 'New Task'. Each option has a corresponding icon. The form in the background includes fields for Name (Salutation, First Name, Last Name), Title, Account Name, Email, and Phone. The 'Save' button is at the bottom right.

**Salesforce**

Search

**Salesforce Records**

- New Contact
- New Opportunity
- New Case
- New Lead
- New Event
- New Task

**Name**

Salutation

--None--

First Name

Alafia

**Last Name**

Welks

Title

Senior Buyer

Account Name

Welo

Email

awelks@welohightech.com

Phone

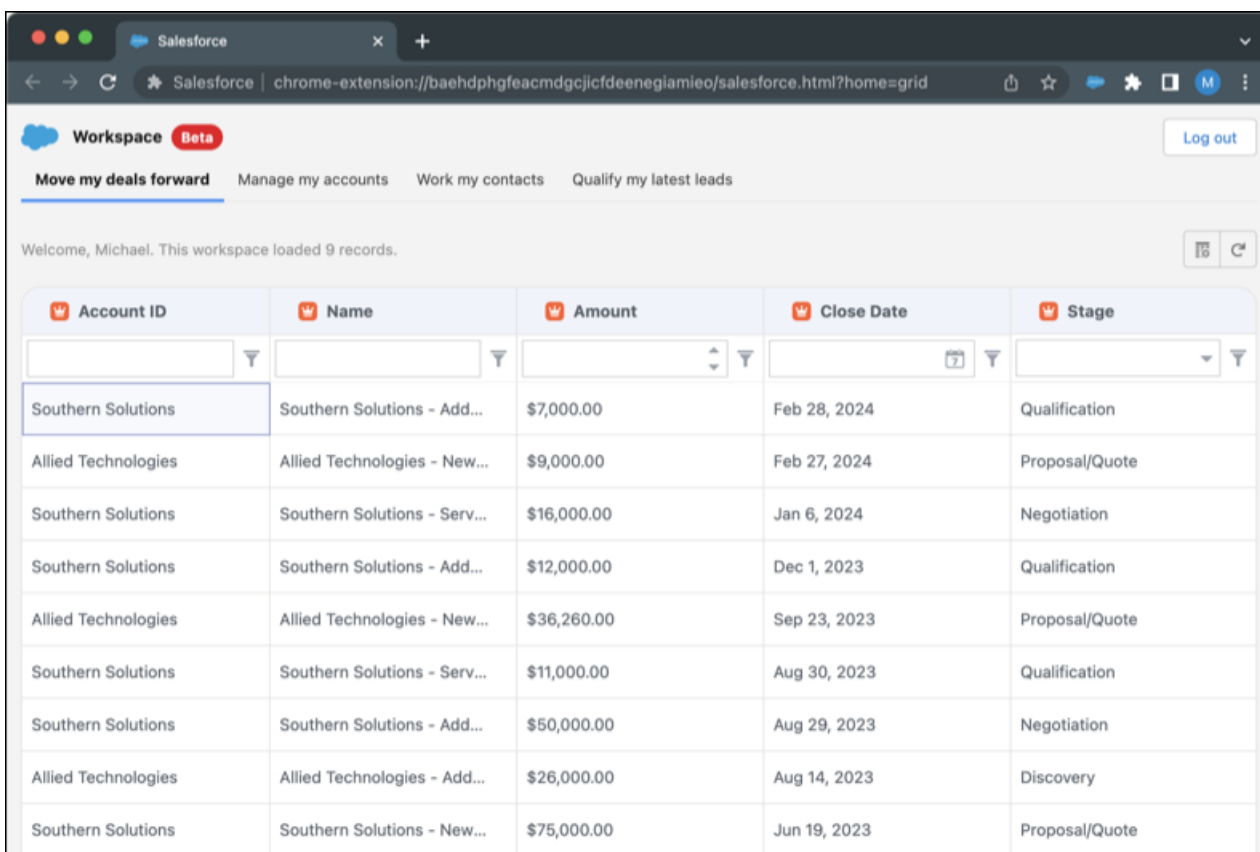
415-555-5555

Save

### Workspace (Beta)

Users can view, sort, and edit their latest leads, open opportunities, recently updated contacts, and recently updated accounts in a new list format called Workspace (beta). When users click the icon in the extension panel, the Workspace opens in a new browser tab.

Users can filter, search, and update records directly in each list.



The screenshot shows the Salesforce Workspace Beta interface. At the top, there's a navigation bar with 'Workspace Beta' and a 'Log out' button. Below it, a header section includes 'Move my deals forward' and other links like 'Manage my accounts', 'Work my contacts', and 'Qualify my latest leads'. A welcome message says 'Welcome, Michael. This workspace loaded 9 records.' Below this is a table with 5 columns: Account ID, Name, Amount, Close Date, and Stage. The table contains 9 rows of data.

Account ID	Name	Amount	Close Date	Stage
Southern Solutions	Southern Solutions - Add...	\$7,000.00	Feb 28, 2024	Qualification
Allied Technologies	Allied Technologies - New...	\$9,000.00	Feb 27, 2024	Proposal/Quote
Southern Solutions	Southern Solutions - Serv...	\$16,000.00	Jan 6, 2024	Negotiation
Southern Solutions	Southern Solutions - Add...	\$12,000.00	Dec 1, 2023	Qualification
Allied Technologies	Allied Technologies - New...	\$36,260.00	Sep 23, 2023	Proposal/Quote
Southern Solutions	Southern Solutions - Serv...	\$11,000.00	Aug 30, 2023	Qualification
Southern Solutions	Southern Solutions - Add...	\$50,000.00	Aug 29, 2023	Negotiation
Allied Technologies	Allied Technologies - Add...	\$26,000.00	Aug 14, 2023	Discovery
Southern Solutions	Southern Solutions - New...	\$75,000.00	Jun 19, 2023	Proposal/Quote

**How:** In Gmail Integration and Sync Setup, turn on Gmail Integration and Use Salesforce Across the Web.

Ask your users to install the Salesforce Chrome extension, available in the Chrome Web Store. The extension prompts users to log in to Salesforce and connect it to Chrome the first time they open the extension. For more information about enabling the Salesforce Chrome extension, see [Set Up the Integration with Gmail](#) in Salesforce Help.

## Salesforce Meetings

Align everyone before a meeting starts by showing them valuable information about prospects and customers with Meeting Digest. Ensure that customers book meetings with you only when you're available. And get ready for Meeting Studio retirement on August 1, 2023.

### IN THIS SECTION:

#### [Nail Your Meetings with Salesforce Meeting Digest](#)

Meeting digest is now available for all users automatically. And, it's the default tab in Event record details for users with Einstein Activity Capture. Enable an activity sync solution, such as Einstein Activity Capture, to get the most out of Meeting Digest, including RSVPs, insights, and recommended actions.

#### [Set Your Available Times for Meetings](#)

You work all day, but you're not always available for meetings. Now specify when customers can book meetings with you. When using Add Scheduling Link and Add Next 3 Available Times, only available meeting times are presented as options.

#### [Meeting Studio is Being Retired](#)

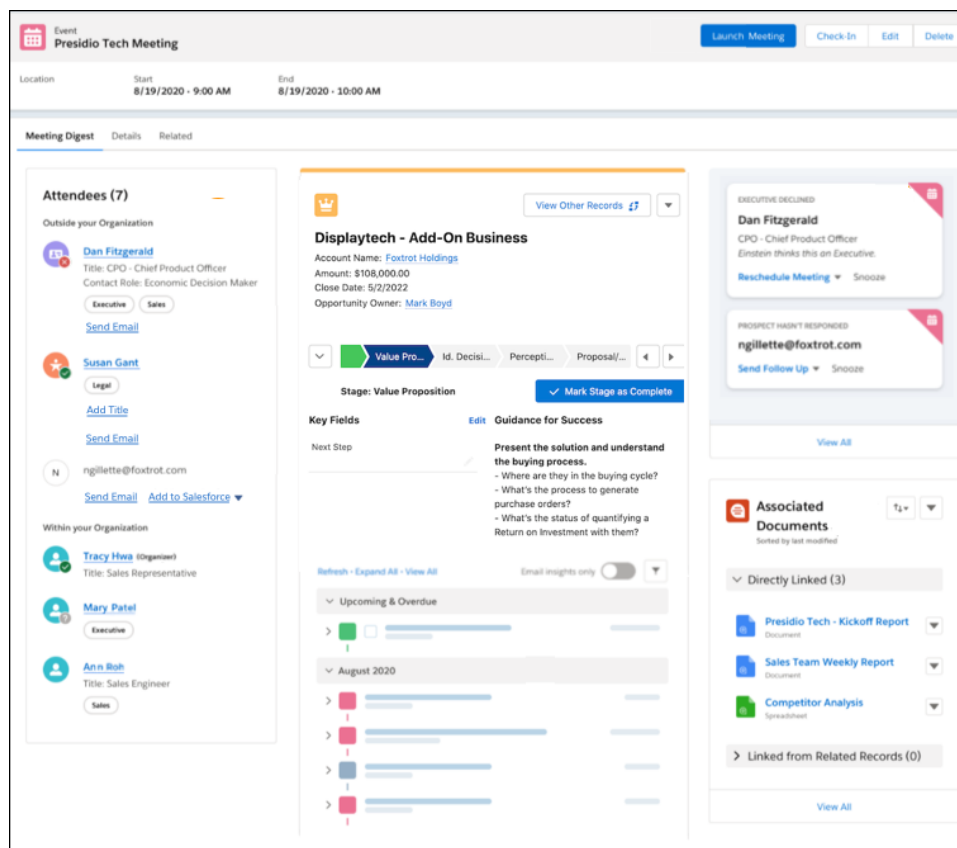
Meeting Studio is being retired with the Spring '24 release.

## Nail Your Meetings with Salesforce Meeting Digest

Meeting digest is now available for all users automatically. And, it's the default tab in Event record details for users with Einstein Activity Capture. Enable an activity sync solution, such as Einstein Activity Capture, to get the most out of Meeting Digest, including RSVPs, insights, and recommended actions.

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

**How:** Go to an event detail page and then the Meeting Digest tab.



Einstein Activity Capture includes more functionality for Salesforce Meetings users to access. For example, email and events are captured from Microsoft or Google accounts and added to the activity timeline of related Salesforce records.

SEE ALSO:

[Send a Meeting Request Quickly from the Dynamic Activity Composer](#)

[Propose Three Future Meeting Times in Lightning Experience](#)

[Salesforce Help: Get Started with Salesforce Meetings \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Edit Your Meeting and Availability Settings \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Meeting Preparation and Follow-Up with the Meeting Digest \(can be outdated or unavailable during release preview\)](#)

## Set Your Available Times for Meetings

You work all day, but you're not always available for meetings. Now specify when customers can book meetings with you. When using Add Scheduling Link and Add Next 3 Available Times, only available meeting times are presented as options.

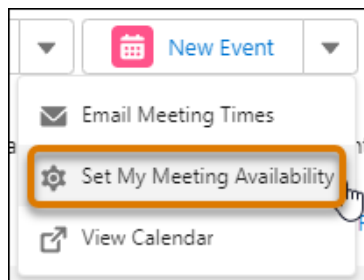
**Where:** This change applies to Lightning Experience in all editions.

**Who:** Users with the Inbox Included or Sales Engagement User Included user permission, available with a Sales Engagement, Sales Cloud Einstein, or Inbox license, can use this feature.

**When:** This feature will be rolled out as a staggered release after June 13, 2023.

**How:** Users can set their availability from two places.

From the email composer, click the Availability icon and choose **Set My Meeting Availability**.



In personal settings, find Meeting Settings and make your changes.

 A screenshot of the 'Meeting Settings' page in Salesforce. The page has a header 'Meeting Settings' with a calendar icon. The main section is titled 'Meeting Availability' and includes a sub-header: 'When you invite someone to choose a meeting time, they see available times only for the hours you set here. By default, your available hours are 9 AM to 5 PM. Your available hours reflect your timezone: (America/Los\_Angeles). [Change Timezone](#)'. Below this, there are tabs for the days of the week: Sunday, Monday, Tuesday, Wednesday, Thursday, Friday, and Saturday. The 'Monday' tab is selected. Under 'Monday', there are two time slots: '9:00 AM' and '5:00 PM', each with a minus/plus icon to adjust the time. A 'Copy Time to All Days' button is also present. Below the time slots is a 'Save Changes' button. The next section is 'Generated Meeting Details' with a sub-header: 'From a scheduling link, a customer can only schedule meetings for the duration you set here. When Salesforce provides the next 3 available times, they're based on these settings.' This section contains four input fields: 'Event Title' (with the value 'Meeting with Roberta R. Suslova'), 'Duration' (with a dropdown set to '30 mins'), 'Buffer Time' (with a dropdown set to '15 mins'), and 'Event Location' (with the placeholder text 'Provide an address or video link here'). There is also a 'Description' field with the value '30 minute meeting with Roberta R. Suslova'. The final section is 'Default Video Conferencing' with a sub-header: 'Automatically generate a video conferencing link when an attendee selects a meeting.' It features a 'Zoom' button and a 'Connect Account' button. At the bottom right of the page is a 'Save' button.

#### SEE ALSO:

[Send a Meeting Request Quickly from the Dynamic Activity Composer](#)

[Propose Three Future Meeting Times in Lightning Experience](#)

[Salesforce Help: Get Started with Salesforce Meetings \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Edit Your Meeting and Availability Settings \(can be outdated or unavailable during release preview\)](#)

## Meeting Studio is Being Retired

Meeting Studio is being retired with the Spring '24 release.

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

**When:** Full product retirement for Meeting Studio is scheduled for the Spring '24 release.

**Why:** Replace Meeting Studio with other video conferencing tools, such as Google Meet, Microsoft Teams, Zoom, and WebEx.

**How:** With the Spring '24 release, you can't access or use Meeting Studio. Your Salesforce data isn't impacted, because it's not stored or captured in Meeting Studio.

 **Note:** Meeting Digest is still supported.

### SEE ALSO:

[Salesforce Help: Engage with Customers and Prospects Using Meeting Studio \(can be outdated or unavailable during release preview\)](#)

[Knowledge Article: Meeting Studio Retirement](#)

## Email Experience

Your users can do their jobs faster and more efficiently by sending a meeting request with one click from the dynamic activity composer. In Lightning Experience, they can easily propose three upcoming meeting times. Control who can use organization-wide email addresses. And explore expanded ways to verify the identity of email senders.

### IN THIS SECTION:

[Send a Meeting Request Quickly from the Dynamic Activity Composer](#)

Are your reps in a hurry to set up some meetings? Now they can start the process with one click. Previously, reps had to open an email and click twice to insert proposed meeting times.

[Propose Three Future Meeting Times in Lightning Experience](#)

Sales reps often have to email back and forth with customers to set up a meeting. Now reps can quickly add three upcoming meeting times as a suggestion and avoid the negotiating. Previously, this feature was available only with the Outlook and Gmail integrations.

[Save Space by Tracking External Email Only](#)

Tracking emails is a great way to take your customer's pulse. Tracking tells you whether they've opened an email or clicked the included link. Seeing whether your colleague opened an email, not so much. Choose what your company wants to track. Now only emails to external email addresses are tracked. Previously, internal emails were also tracked by default.

[Use an Organization-Wide Email Address to Send Automated Process Emails](#)

To improve security, Salesforce now restricts companies from sending automated process emails from an unverified email address. To send automated process emails, first set up an organization-wide email address. Then go to the Process Automation Settings page in Setup and enter the designated email address in the Automated Process User Email Address field.

[Control Who Can Use Organization-Wide Email Addresses](#)

You want greater control over who can use organization-wide email addresses in the From field on outgoing emails. Now you can use permission sets to limit who can use each organization-wide email address. As before, you can also use profiles or make each organization-wide email address available to all users.



### Give Email Recipients Confidence in the Sender's Identity

Use the DKIM (DomainKeys Identified Mail) key feature to let Salesforce sign outbound email sent on your company's behalf. For each DKIM key, you can now create a comma-separated list of domain patterns with optional wildcards. When an email is sent, Salesforce matches the domain in the From header against the patterns for each key. When a match is found, the key is used to sign the message.

### Verify Email Sender Legitimacy with DMARC and DKIM

When you set up an email service, you can configure the service to verify the legitimacy of the sending server before it processes incoming mail. To improve that verification, the email service now uses an expanded list of authentication protocols, including DMARC and DKIM.

### Sales Cloud Now Includes Email Productivity Features in Professional and Enterprise Editions

To add more value to Sales Cloud in Professional and Enterprise Editions, we're now including features and functionality that previously required purchasing an add-on license. These features include email productivity tools such as send later, email tracking, text shortcuts, and email engagement. Email engagement features include My Feed inside of the Outlook and Gmail integration panels, notifications from Sales Cloud Everywhere, and custom report types for engagement data.

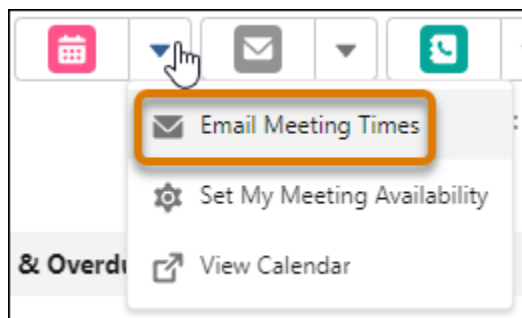
## Send a Meeting Request Quickly from the Dynamic Activity Composer


Are your reps in a hurry to set up some meetings? Now they can start the process with one click. Previously, reps had to open an email and click twice to insert proposed meeting times.

**Where:** This change applies to Lightning Experience in Essentials, Professional, Enterprise, Unlimited, and Developer editions with Salesforce Inbox and Enhanced Email.

**Who:** Users with the Inbox Included or Sales Engagement User Included user permission, available with a Sales Engagement, Sales Cloud Einstein, or Inbox license, can use this feature.

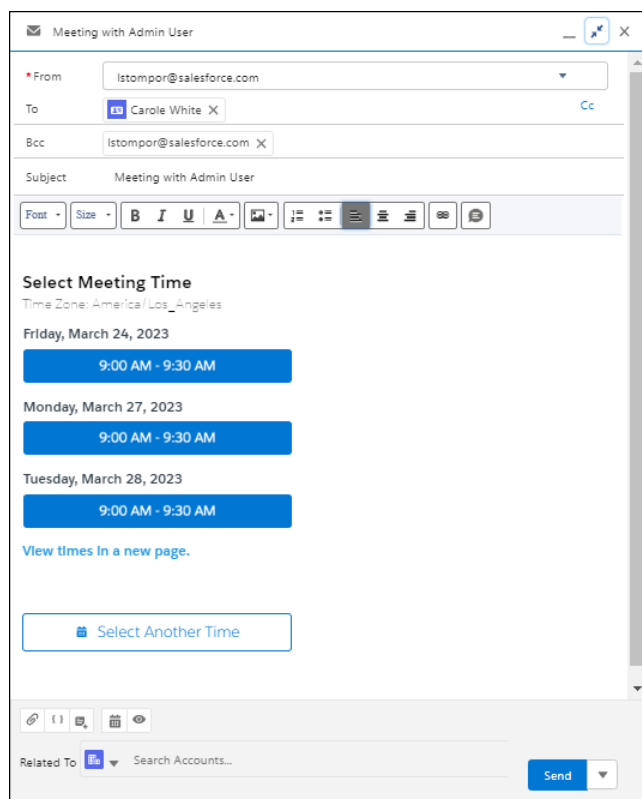
**How:** In the New Event action dropdown for contacts and leads, select **Email Meeting Times**.



 **Note:** If this option isn't visible, confirm that the New Event action is on the page layout.

An email opens, showing the first available meeting time slot in the next 3 days and a scheduling link in case none of those times are convenient.

Users can set their available times on the Meeting Settings page.



SEE ALSO:

[Set Your Available Times for Meetings](#)

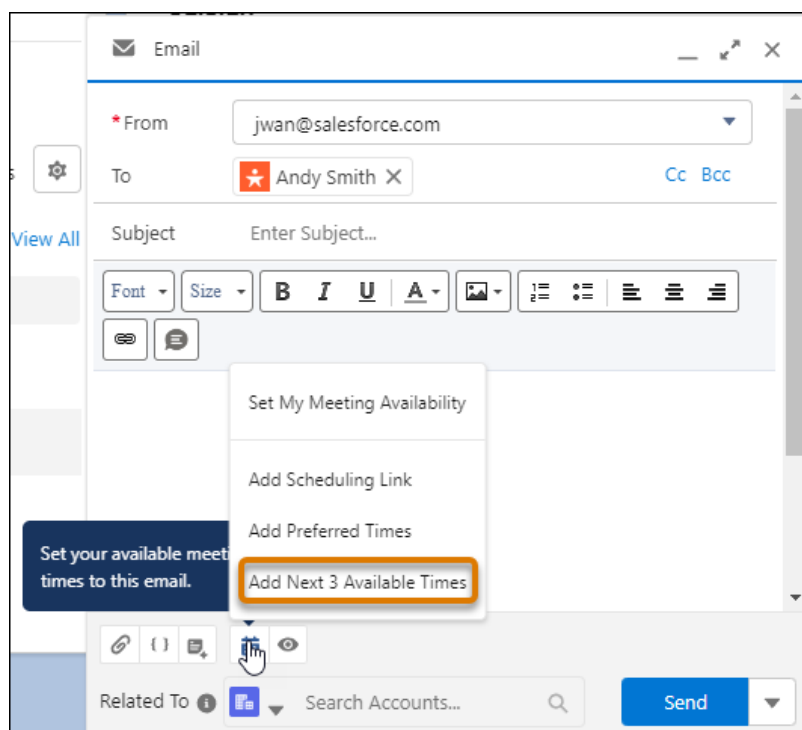
## Propose Three Future Meeting Times in Lightning Experience

Sales reps often have to email back and forth with customers to set up a meeting. Now reps can quickly add three upcoming meeting times as a suggestion and avoid the negotiating. Previously, this feature was available only with the Outlook and Gmail integrations.

**Where:** This change applies to Lightning Experience in Essentials, Professional, Enterprise, Unlimited, and Developer editions with Salesforce Inbox and Enhanced Email.

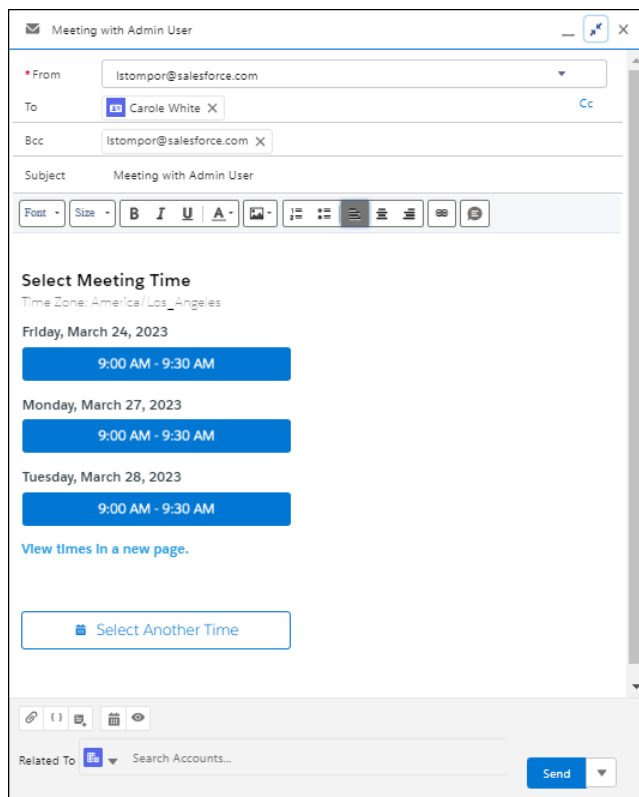
**Who:** Users with the Inbox Included or Sales Engagement User Included user permission, available with a Sales Engagement, Sales Cloud Einstein, or Inbox license, can use this feature.

**How:** Reps start composing an email for contacts or leads. In the email composer, they click the scheduling icon and select **Add Next 3 Available Times**.



Users can set their available times on the Meeting Settings page.

The suggested times are the first available meeting for each of the next three business days, excluding the current business day. A rescheduling link is also inserted, in case none of those times are convenient.



SEE ALSO:

[Set Your Available Times for Meetings](#)

[Salesforce Help: Edit Your Meeting and Availability Settings \(can be outdated or unavailable during release preview\)](#)

## Save Space by Tracking External Email Only

Tracking emails is a great way to take your customer's pulse. Tracking tells you whether they've opened an email or clicked the included link. Seeing whether your colleague opened an email, not so much. Choose what your company wants to track. Now only emails to external email addresses are tracked. Previously, internal emails were also tracked by default.

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

**Who:** Users with the Use Inbox user permission, available with a Sales Engagement, Sales Cloud Einstein, or Inbox license, can use this feature.

**How:** In Setup, go to Inbox Setup Assistant and select the settings you need.

### Enable Inbox Features

Einstein Activity Capture

Let Einstein log email and events from the Salesforce Inbox mobile and desktop apps to related Salesforce records. If you don't enable this feature, your reps can still manually log email and events.

Set Up

External Email Tracking

Track emails with at least one recipient outside your company. See if and when recipients, including those in your company, open emails sent from the Outlook and Gmail integrations or the Inbox mobile app. Learn how to add the email tracking component to your users' email application panes in [Salesforce Help](#). Learn how to enable tracking for emails sent from Lightning Experience in [Salesforce Help](#).

☒ On

Internal Email Tracking

Track emails with recipients only from your company. See if and when recipients open emails sent from the Outlook and Gmail integrations or the Inbox mobile app. Learn how to add the email tracking component to your users' email application panes in [Salesforce Help](#). Learn how to enable tracking for emails sent from Lightning Experience in [Salesforce Help](#).

☒ On

**SEE ALSO:**

[Salesforce Help: Track External and Internal Email](#) (can be outdated or unavailable during release preview)

[Salesforce Help: Email Open Tracking and Email Opt Out](#) (can be outdated or unavailable during release preview)

## Use an Organization-Wide Email Address to Send Automated Process Emails

To improve security, Salesforce now restricts companies from sending automated process emails from an unverified email address. To send automated process emails, first set up an organization-wide email address. Then go to the Process Automation Settings page in Setup and enter the designated email address in the Automated Process User Email Address field.

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

**SEE ALSO:**

[Salesforce Help: Organization-Wide Email Addresses](#) (can be outdated or unavailable during release preview)

## Control Who Can Use Organization-Wide Email Addresses

You want greater control over who can use organization-wide email addresses in the From field on outgoing emails. Now you can use permission sets to limit who can use each organization-wide email address. As before, you can also use profiles or make each organization-wide email address available to all users.

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

**How:** To add permission sets to an organization-wide email address, go to each permission set's overview page in Setup. You can then see the list of added permission sets on the organization-wide email address's page in Setup.

**SEE ALSO:**

[Salesforce Help: Set Up Organization-Wide Email Addresses](#) (can be outdated or unavailable during release preview)

## Give Email Recipients Confidence in the Sender's Identity

Use the DKIM (DomainKeys Identified Mail) key feature to let Salesforce sign outbound email sent on your company's behalf. For each DKIM key, you can now create a comma-separated list of domain patterns with optional wildcards. When an email is sent, Salesforce matches the domain in the From header against the patterns for each key. When a match is found, the key is used to sign the message.

**Where:** This change applies to Lightning Experience and Salesforce Classic in all editions except Database.com.

**How:** To create your list of domain patterns, go to the DKIM Keys page in Setup.

SEE ALSO:

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

[Salesforce Help: Considerations for Creating DKIM Keys \(can be outdated or unavailable during release preview\)](#)

## Verify Email Sender Legitimacy with DMARC and DKIM

When you set up an email service, you can configure the service to verify the legitimacy of the sending server before it processes incoming mail. To improve that verification, the email service now uses an expanded list of authentication protocols, including DMARC and DKIM.

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

SEE ALSO:

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

[Salesforce Help: What Is DMARC? \(can be outdated or unavailable during release preview\)](#)

## Sales Cloud Now Includes Email Productivity Features in Professional and Enterprise Editions

To add more value to Sales Cloud in Professional and Enterprise Editions, we're now including features and functionality that previously required purchasing an add-on license. These features include email productivity tools such as send later, email tracking, text shortcuts, and email engagement. Email engagement features include My Feed inside of the Outlook and Gmail integration panels, notifications from Sales Cloud Everywhere, and custom report types for engagement data.

**Where:** This change applies to Sales Cloud in Lightning Experience in Enterprise and Professional Editions.

**When:** This change will appear on July 19, 2023.

**Why:** These features provide additional functions that make sellers' work easier and more efficient.

**How:** Not all features now included in Professional and Enterprise Editions are enabled automatically. In Setup, enable the specific features you want for your business. To let new users access these features, assign them the appropriate permission. These new features can be assigned to up to 100 users.

SEE ALSO:

[Sales Cloud Now Includes Quick Cadences and Email Productivity Features in Professional and Enterprise Editions](#)

[Salesforce Help: Work With Salesforce's Email](#)

[Salesforce Help: Turn On Sales Engagement Features](#)

## Salesforce Inbox

Check out the latest improvements to Salesforce Inbox.

### IN THIS SECTION:

#### [Salesforce Inbox Mobile](#)

Learn about the latest features and enhancements to Inbox mobile in Salesforce Help.

## Salesforce Inbox Mobile

Learn about the latest features and enhancements to Inbox mobile in Salesforce Help.

- [Inbox Mobile for iOS](#)
- [Inbox Mobile for Android](#)

## Salesforce CMS

---

Create workflows and streamline approvals in enhanced CMS workspaces. Manage CMS content from the improved content detail page. Manage unlimited content with Salesforce CMS. Create enhanced CMS channels to associate with enhanced CMS workspaces.

### IN THIS SECTION:

#### [Create Workflows and Streamline Approvals in Enhanced CMS Workspaces \(Generally Available\)](#)

Use CMS Workflows and Approvals, now generally available in enhanced CMS workspaces, to create custom workflows directly from your CMS content items. Build flows for approvals, translation requests, and more and access them directly from your content items. View history from the Workflow component to see a full audit trail of your workflow process. To get started, use the prebuilt Basic Approval Workflow, created with Flow Orchestration technology.

#### [Manage CMS Content from the Improved Content Detail Page](#)

Content authors and managers can see a summarized view of content from the new detail page in enhanced CMS Workspaces. If a content item has multiple variants, you can switch between variants from the menu on the left. View content details, version history, and see where the content is published or referenced. Edit, publish, or unpublish, and run content workflows for your content.

#### [Use the Manage Menu for CMS Content and Translations in Enhanced CMS Workspaces](#)

Content authors and managers can now manage actions for CMS content and translation from the consolidated Manage menu. Use it to move CMS content and to export and import content and translations.

#### [Navigate Your Enhanced CMS Content with Search Improvements](#)

Discover all your translated content with every search. Searches in enhanced CMS workspaces now match against all text fields in translation variants, including alt text, body, and title. Previously, searches matched against all text fields for primary content, but only title fields for translation variants. And when you create a news content item and browse for an image to include, you use the same smart search functions available to explore your full enhanced content library.

#### [Use Salesforce CMS to Manage Unlimited Content with All Salesforce Licenses](#)

Use Salesforce CMS to manage unlimited content, even if you don't use Experience Cloud. Now, all CMS users have an unlimited number of content items. Previously, if you didn't have an Experience Cloud license, you were limited to 500 content items. And now you can create as many as 100 custom content types, up from 20.

#### [View Content References in Usage Info Tab on Detail Page](#)

Replace content before you unpublish it from an enhanced CMS workspace. You can see a list and count of all the records that use the content. The list appears on the new Usage Info tab of the content details page.

### Create Enhanced CMS Channels

Now you can publish content from an enhanced CMS workspace to enhanced public and restricted channels. And it's easy to identify enhanced CMS channels in the Channels list view with the enhanced badge.

## Create Workflows and Streamline Approvals in Enhanced CMS Workspaces (Generally Available)

Use CMS Workflows and Approvals, now generally available in enhanced CMS workspaces, to create custom workflows directly from your CMS content items. Build flows for approvals, translation requests, and more and access them directly from your content items. View history from the Workflow component to see a full audit trail of your workflow process. To get started, use the prebuilt Basic Approval Workflow, created with Flow Orchestration technology.

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

**Why:** With workflows you can control access to content publication and send content for review and approval directly from the content detail page. Use roles in Salesforce CMS to 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.

**How:** Workflows and Approvals are automatically added to all enhanced CMS workspaces and appear on the content details page of your content items.

## Manage CMS Content from the Improved Content Detail Page

Content authors and managers can see a summarized view of content from the new detail page in enhanced CMS Workspaces. If a content item has multiple variants, you can switch between variants from the menu on the left. View content details, version history, and see where the content is published or referenced. Edit, publish, or unpublish, and run content workflows for your content.

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



**Digital Experiences** CMS Workspaces Spring 2022

Overview: How to Brew Coffee How to Brew Coffee

**How to Brew Coffee**

Content Key: JHFM438HDFDFVNDP Content Type: Document Location: Coffee Blogs

**Variants** Usage Info

English (default) French Spanish

**How to Brew Coffee**

Switch to previous layout Edit Publish

**Workflows**

Select a workflow from the dropdown menu and click Start.

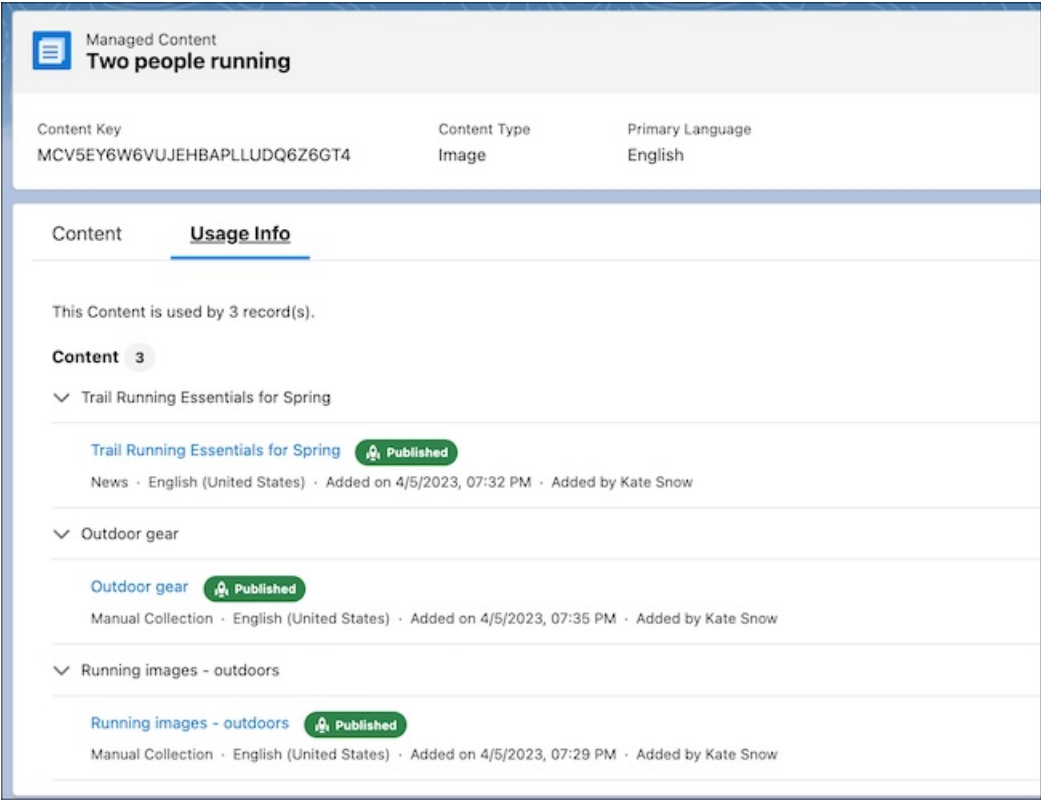
Select Workflow Start

**Details** Versions

Status	Content Slug
Published	how-to-brew-coffee
Last Modified Date	Last Modified by
07/01/2022, 10:00 AM	Ana Thomas
Created Date	Created by
07/01/2022, 10:00 AM	Ana Thomas
Locked	Ready to be Published
No	Yes

**Note:** The improved content detail page replaces the previous content variant detail page. If you created custom components on the variant detail page, you can access them using the temporary “Switch to previous layout” link. Migrate your custom components to the new content detail page, as the previous layout is inaccessible starting Winter '24.

**How:** Track content usage and anticipate the impact of any content changes. Click Usage Info to see a list of all sites, flows, collections, and other places the content item and its variants are referenced. Usage is listed for each published variant of a content item.



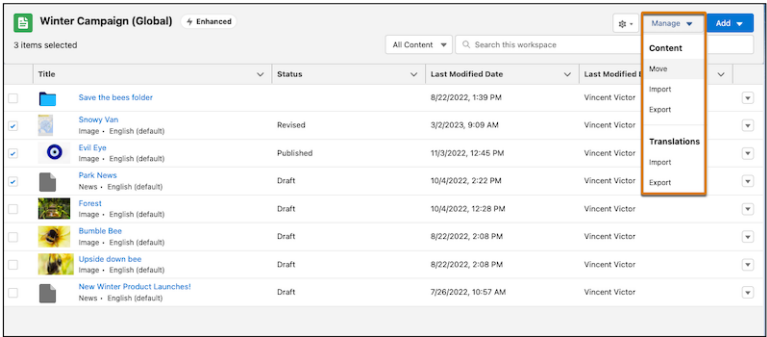
SEE ALSO: [Salesforce Help: View CMS Content Details in Enhanced CMS Workspaces \(can be outdated or unavailable during release preview\)](#)

# Use the Manage Menu for CMS Content and Translations in Enhanced CMS Workspaces

Content authors and managers can now manage actions for CMS content and translation from the consolidated Manage menu. Use it to move CMS content and to export and import content and translations.

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

**How:** To move content and to export and import content and translations in an enhanced CMS workspace, use the new Manage menu and select an action.

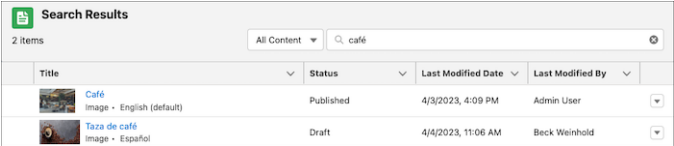


## Navigate Your Enhanced CMS Content with Search Improvements

Discover all your translated content with every search. Searches in enhanced CMS workspaces now match against all text fields in translation variants, including alt text, body, and title. Previously, searches matched against all text fields for primary content, but only title fields for translation variants. And when you create a news content item and browse for an image to include, you use the same smart search functions available to explore your full enhanced content library.

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

**Why:** Enhanced CMS workspaces searches match against all text fields in all translation variants so that you can easily find the content that you're looking for.



Title	Status	Last Modified Date	Last Modified By
Café Image - English (default)	Published	4/3/2023, 4:09 PM	Admin User
Taza de café Image - Español	Draft	4/4/2023, 11:06 AM	Beck Weinhold

SEE ALSO:

[Salesforce Help: Search for CMS Content in Enhanced Workspaces \(can be outdated or unavailable during release preview\)](#)

## Use Salesforce CMS to Manage Unlimited Content with All Salesforce Licenses

Use Salesforce CMS to manage unlimited content, even if you don't use Experience Cloud. Now, all CMS users have an unlimited number of content items. Previously, if you didn't have an Experience Cloud license, you were limited to 500 content items. And now you can create as many as 100 custom content types, up from 20.

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

You no longer need an Experience Cloud license to have unlimited use of the Salesforce Content Management System (CMS).

**Why:** So everyone can get the benefits of managing content in the Salesforce CMS! Store your content assets in CMS and use them to create sites, emails, blog posts and more. Stay organized and reach more customers.

## View Content References in Usage Info Tab on Detail Page

Replace content before you unpublish it from an enhanced CMS workspace. You can see a list and count of all the records that use the content. The list appears on the new Usage Info tab of the content details page.

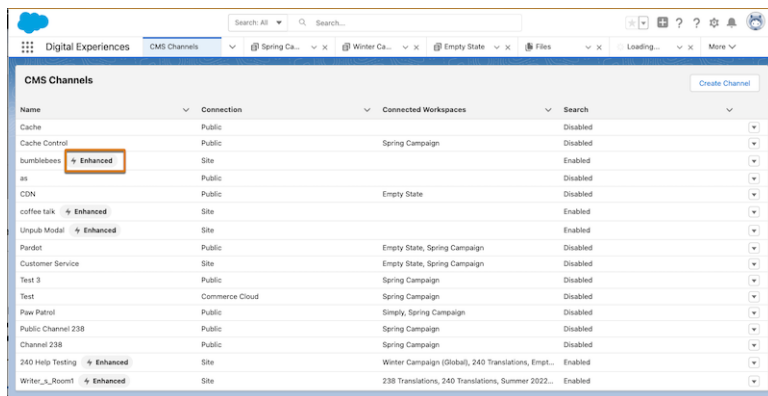
**Where:** This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions.

## Create Enhanced CMS Channels

Now you can publish content from an enhanced CMS workspace to enhanced public and restricted channels. And it's easy to identify enhanced CMS channels in the Channels list view with the enhanced badge.

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

**How:** Create enhanced CMS channels from either the CMS Channels tab in the Digital Experiences app or within an enhanced CMS workspace. View and edit enhanced channels from the CMS Channels tab in the Digital Experiences app.



## 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, also called Flow Integration, is now part of Salesforce Flow. 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 without using code (generally available). Send data to external servers without using code (beta). Create screens that react to changes from other components on the same screen (beta). Log emails and use email templates with the Send Email action. Convert processes with scheduled actions to flows with the Migrate to Flow tool. Convert MuleSoft REST APIs into invocable actions. Use multi-select picklists in screen flows for Flow in Slack.

#### Flow Orchestration

Control the context that your autolaunched orchestration, background steps, and evaluation flows run in. Use the new MuleSoft step to run MuleSoft actions from an orchestration. Add comments to orchestration run logs, list views, and detail views. Benefit from refreshed record and record collection variables after an orchestration running on version 58.0 resumes.

#### OmniStudio

Accessibility improvements enable screen readers to accurately render the OmniScript runtime experience. The name of the Standard OmniStudio Runtime setting changed.

## Flow Integration

MuleSoft Composer for Salesforce, also called Flow Integration, is now part of Salesforce Flow. 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 without using code (generally available). Send data to external servers without using code (beta). Create screens that react to changes from other components on the same screen (beta). Log emails and use email templates with the Send Email action. Convert processes with scheduled actions to flows with the Migrate to Flow tool. Convert MuleSoft REST APIs into invocable actions. Use multi-select picklists in screen flows for Flow in Slack.

### IN THIS SECTION:

#### [Flow Builder Updates](#)

Get external data without using code (generally available). Send data to external servers without using code (beta). Create screens that react to changes from other components on the same screen (beta). Use reactive formulas to perform logic on the same screen (beta). Log emails and use email templates with the Send Email action.

#### [Flow Trigger Explorer](#)

View more record-triggered flows in Flow Trigger Explorer.

#### [Flow and Process Management](#)

We disabled the creation of new Process Builder processes, but you can still activate, deactivate, and edit them. Convert processes with scheduled actions to flows with the Migrate to Flow tool. Delete a flow or process version from a managed package.

#### [Flow Extensions](#)

Convert MuleSoft REST APIs into invocable actions. Use multi-select picklists in screen flows for Flow in Slack. Use more data types in flow screen input parameters for Flow in Slack.

#### [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 without using code (generally available). Send data to external servers without using code (beta). Create screens that react to changes from other components on the same screen (beta). Use reactive formulas to perform logic on the same screen (beta). Log emails and use email templates with the Send Email action.

### IN THIS SECTION:

#### [Bring External Data into Flow Builder Without Code \(Generally Available\)](#)

Automate processes with external data by creating an HTTP callout action that calls a web-based service API, all within Flow Builder and without code. After you add the API details, Flow Builder generates a reusable callout action that you can use right away in Flow Builder and across Salesforce. This feature, now generally available, includes some changes since the last release. You can now edit an HTTP callout action declaratively and more easily configure the inferred data structure that makes the response usable in a flow.

#### [Send Salesforce Data to an External Server Without Code via HTTP Callout \(Beta\)](#)

If you can't GET enough with HTTP Callout, now you can use the POST method to send Salesforce data to an external server in Flow Builder. Previously, only the GET method was available, which you can use to bring external data into Salesforce.

#### [Build Screens with Reactive Components \(Beta\)](#)

Configure supported standard screen components or your custom Lightning web components to react to changes in other Flow Screen components on the same screen. Build screens that feel like single-page apps and reduce the number of screens your user needs to click through. Previously, components on the same screen couldn't talk to each other. If you needed one component to influence another, you placed them on separate screens.

### [Update the Screen in Real-Time using Formulas \(Beta\)](#)

Working with supported formula functions, you can configure a screen component to perform real-time formula calculations and logic. When the flow detects a change in any of the values in the formula, it recalculates and updates the value of the screen component.

### [Log Emails Sent with the Send Email Action](#)

Now you can automatically log emails to a record's Activity Timeline when using the Send Email action. You can log an email to a recipient record, which includes leads, contacts, and person accounts. You can also log an email to a non-recipient record, like an account or opportunity. Or, you can log an email to both. Previously, emails sent using the Send Email action couldn't be automatically tracked in Activity Timelines.

### [Use Email Templates in the Send Email Action](#)

Reuse email content with Lightning and Classic email templates in the Send Email action. If your email template has merge fields, you can use the recipient record or a related record to populate the merge fields. Or, you can use both. Previously, you couldn't use email templates in the Send Email action.

### [Get Records from Data Cloud Objects in Flow Builder](#)

Now you can use Data Cloud data in the Get Records element of a flow or in Apex code. You can read data from Data Cloud data model objects (DMO), but you can't create, update, or delete Data Cloud data. For example, a customer submits a product interest form on your website. Use a flow to create a Lead record with more information in your Salesforce CRM using a Get Records element to access the data in the Data Cloud Form DMO. Data Cloud data is available only in production orgs that are connected to Data Cloud.

### [Search and Display Data Table Results in Screen Flows](#)

Now users can search and filter their Data Table record results. The search returns the first 1,500 items. Initially, 200 records display. As you scroll through the results, additional records load progressively in groups of 100. The search results also show the number of items displayed and the total number of items found.

### [Provide Users a List of Choices for Easy Selection with Choice Lookup \(Generally Available\)](#)

Add the Choice Lookup flow screen component to give users a filtered list to select from. For example, you can create a list of external data values, picklist values, static values, or records that you filtered when you configured the flow. This feature, now generally available, includes some changes since the last release. Initially, 20 choice options display. As you scroll, more choice options load in groups of 100, up to the maximum of 1,020. If you apply a filter after loading your initial choices, the display resets, showing the new 20 choices.

### [Use Security Center Objects in Flows](#)

Automate your processes for Security Center data. Now you can create record-triggered flows based on Security Center objects.

### [Get Field Visibility Errors during Flow Runtime](#)

If you have field visibility errors in your flow, the flow now stops running and presents an error message. Previously, you didn't get an error message, and the flow continued to run.

### [Get Improved Accessibility in Flow Builder with New Element Colors](#)

Creating flows is easier with new element colors that meet accessibility guidelines.

### [View More Elements on the Flow Builder Canvas](#)

Now you can see more elements on the Flow Builder canvas with a new compact layout and a smaller Add Element button. Previously, elements were further spread out, requiring you to move the canvas more frequently to see additional elements.

### [Reference Choice Sets Only in Choice Components](#)

When configuring flow screen components, Flow Builder only lets you reference record choice sets, collection choice sets, or picklist choice sets from a single location - a choice component's data source. Previously you could set the reference from several other places such as conditions, filters, or component default values, but those references were unsupported and could generate an error. Now you won't see these options as a choice in places where they are no longer allowed.

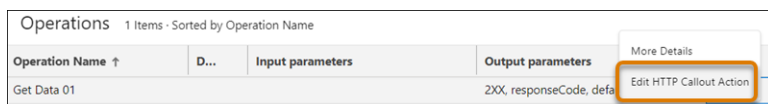
## Bring External Data into Flow Builder Without Code (Generally Available)

Automate processes with external data by creating an HTTP callout action that calls a web-based service API, all within Flow Builder and without code. After you add the API details, Flow Builder generates a reusable callout action that you can use right away in Flow Builder and across Salesforce. This feature, now generally available, includes some changes since the last release. You can now edit an HTTP callout action declaratively and more easily configure the inferred data structure that makes the response usable in a flow.

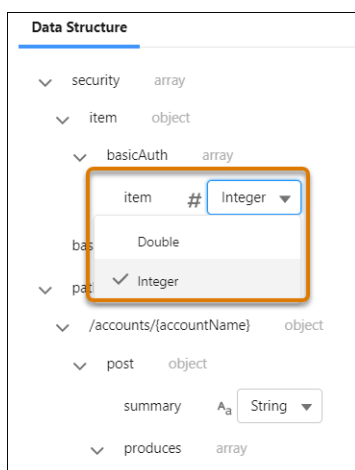
**Where:** This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions.

**Who:** To create an HTTP callout action, admins must have the Manage Flow and Customize Applications permissions.

**Why:** APIs regularly change, for example, when a new field is added to an external system. Previously, to edit the reusable HTTP callout action, you modified the autogenerated API specification, which required JSON skills. Now, you can edit the action with clicks.



Previously, when configuring the parsing of the API's response, to change data types in an inferred data structure, you edited JSON. Now, you select the field's data types with clicks, directly in the inferred data structure. Date, Date/Time, and Boolean data types are supported.



As an extra bonus, you get more intuitive error messages when building your HTTP callout action to help resolve the error and prevent issues at run time.

### SEE ALSO:

[Declaratively Edit External Services Created by HTTP Callout](#)


[Salesforce Help: Update an Existing HTTP Callout Action \(can be outdated or unavailable during release preview\)](#)

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

## Send Salesforce Data to an External Server Without Code via HTTP Callout (Beta)

If you can't GET enough with HTTP Callout, now you can use the POST method to send Salesforce data to an external server in Flow Builder. Previously, only the GET method was available, which you can use to bring external data into Salesforce.

**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:** Select **POST (Beta)** to make a callout request that adds the resource to the external server.

A screenshot of the 'Method' dropdown menu in the HTTP Callout configuration. The dropdown is open, showing three options: 'POST (Beta)' (selected and highlighted with a checkmark), 'GET', and another 'POST (Beta)' option at the bottom.

Enter a sample JSON request body that the API expects when configuring the HTTP Callout, and the API infers the external data structure.

A screenshot of the 'Sample JSON Request' and 'Data Structure' sections. The 'Sample JSON Request' shows a JSON object with fields: id, petId, quantity, shipDate, status, and complete. The 'Data Structure' section lists these fields with their inferred types: petId (Integer), quantity (Integer), id (Integer), shipDate (Date/Time), complete (Boolean), and status (String).

After you create the callout action, set the body for the flow by creating a resource and selecting the Apex class for the external server's body.

A screenshot of the 'New Action' configuration screen. The action is 'externalService-ExtSvcName.Send Data to External Server'. Below the action name, there are fields for 'Label' and 'API Name', and a 'Description' field. Under 'Set Input Values for the Selected Action', the 'body' input is highlighted with an orange box, and a '+ New Resource' button is visible below it.

After you configure the action, add an Assignment element before the HTTP Callout action element, and assign values for each of the fields on the resource.

When the flow runs, the values are set on the resource and the data is sent to the external server.

#### SEE ALSO:

[Salesforce Help: Configure an HTTP Callout Action \(can be outdated or unavailable during release preview\)](#)



## Build Screens with Reactive Components (Beta)

Configure supported standard screen components or your custom Lightning web components to react to changes in other Flow Screen components on the same screen. Build screens that feel like single-page apps and reduce the number of screens your user needs to click through. Previously, components on the same screen couldn't talk to each other. If you needed one component to influence another, you placed them on separate screens.

Screen Flow reactivity means your Screen Flow component updates the properties of other components on the screen based on user input. For example, you can make a Name component's First Name field react to the Text component output.

Your existing flows start displaying reactivity when you opt into Beta and explicitly save them with API version 57.0 and later.



**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](#).

**Where:** This feature is new in both Lightning Experience and Salesforce Classic. However, it only works in Lightning runtime for flows.

**How:** From Setup, on the Process Automation Settings page, select **Opt into Reactive Screens Beta**. Then add components to your screen, upgrade your flow to Runtime API Version 57.0, and save and run the flow as usual. The input component reacts to changes from the output component.

SEE ALSO:

[Salesforce Help: Considerations for Reactivity in Screen Flows \(Beta\)](#)

[Salesforce Help: Make Your Components Reactive \(Beta\)](#)

## Update the Screen in Real-Time using Formulas (Beta)

Working with supported formula functions, you can configure a screen component to perform real-time formula calculations and logic. When the flow detects a change in any of the values in the formula, it recalculates and updates the value of the screen component.

For example, the user sees a real-time screen update of a price discount, tax amounts, and shipping costs. Now it isn't necessary for users to remember what they selected on a previous screen, thus less confusion and fewer clicks.

Your existing flows only start displaying reactivity when you opt into the Beta program and explicitly save them with API version 57.0 and later.



**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](#).

**Where:** This feature is new in both Lightning Experience and Salesforce Classic. However, it only works in Lightning runtime for flows.

**How:** From Setup, on the Process Automation Settings page, select **Opt into Reactive Screens Beta**. Then add components to your screen, upgrade your flow to Runtime API Version 57.0, and save and run the flow as usual. The input component reacts to changes from the output component.

SEE ALSO:

[Salesforce Help: Considerations for Reactivity in Screen Flows \(Beta\)](#)

[Salesforce Help: Make Your Components Reactive \(Beta\)](#)

## Log Emails Sent with the Send Email Action

Now you can automatically log emails to a record's Activity Timeline when using the Send Email action. You can log an email to a recipient record, which includes leads, contacts, and person accounts. You can also log an email to a non-recipient record, like an account or opportunity. Or, you can log an email to both. Previously, emails sent using the Send Email action couldn't be automatically tracked in Activity Timelines.

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

**How:** For example, to send and log an email to a contact record and also log to its related account record, set Log Email on Send to `!!$GlobalConstant.True` (1). Then, set Recipient ID to the contact record's ID (2) and Related Record ID to the account record's ID (3).



**Note:** Logging emails with the Send Email action changes the API called by the action, which changes the daily email send limit to the [General Email Limit](#) instead of the [Daily Workflow Email Limit](#).

**Edit Action**

Use values from earlier in the flow to set the inputs for the "Send Email" core action. To use its outputs later in the flow, store them in variables.

**Send Email to New Contact** (Send\_Email\_to\_New\_Contact)

Set Input Values for the Selected Action

**Body**

**Email Template ID** `{!Get_Email_Template.Id}`

**Log Email on Send** `!!$GlobalConstant.True` **1**

**Recipient Address Collection**

**Recipient Address List**

**Recipient ID** `{!Get_Contact.Id}` **2**

**Related Record ID** `{!Get_Contact.AccountId}` **3**

**Rich-Text-Formatted Body**

**Sender Email Address**

**Sender Type**

**Subject**

[Cancel](#) [Done](#)

SEE ALSO:

[Salesforce Help: Flow Core Action: Send Email \(can be outdated or unavailable during release preview\)](#)


[Object Reference for the Salesforce Platform: ActivityHistory](#)

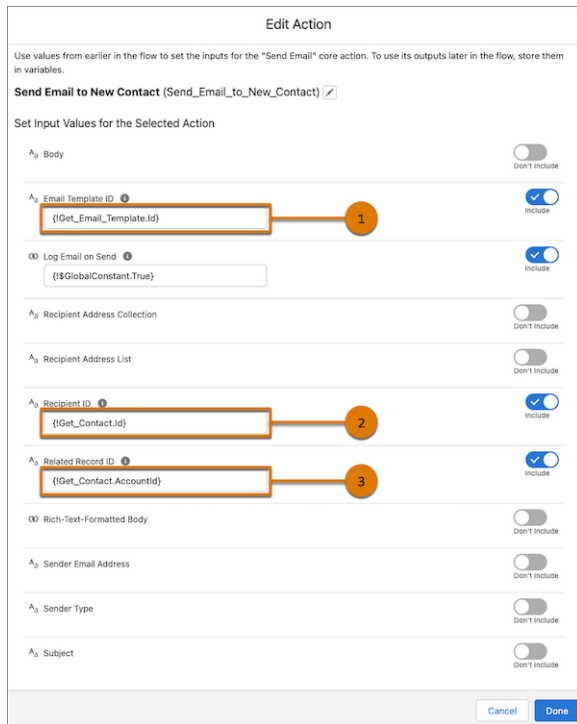
## Use Email Templates in the Send Email Action

Reuse email content with Lightning and Classic email templates in the Send Email action. If your email template has merge fields, you can use the recipient record or a related record to populate the merge fields. Or, you can use both. Previously, you couldn't use email templates in the Send Email action.

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

**How:** For example, to send an email to a contact using an email template with Contact and Account object merge fields, set Email Template ID to the ID of the email template to use (1). Then, set Recipient ID to the contact record's ID (2) and Related Record ID to the related account record's ID (3).

 **Note:** Using email templates in the Send Email action changes the API called by the action, which changes the daily email send limit to the [General Email Limit](#) instead of the [Daily Workflow Email Limit](#).



**Edit Action**

Use values from earlier in the flow to set the inputs for the "Send Email" core action. To use its outputs later in the flow, store them in variables.

**Send Email to New Contact** (Send\_Email\_to\_New\_Contact) ✓

Set Input Values for the Selected Action

**Body** ☐ Don't include

**Email Template ID** ☒ Include  
 {!Get\_Email\_Template.Id} 1

**Log Email on Send** ☒ Include  
 {!GlobalConstant.True}

**Recipient Address Collection** ☐ Don't include

**Recipient Address List** ☐ Don't include

**Recipient ID** ☒ Include  
 {!Get\_Contact.Id} 2

**Related Record ID** ☒ Include  
 {!Get\_Contact.AccountId} 3

**Rich-Text-Formatted Body** ☐ Don't include

**Sender Email Address** ☐ Don't include

**Sender Type** ☐ Don't include

**Subject** ☐ Don't include

Cancel Done

SEE ALSO:

[Salesforce Help: Flow Core Action: Send Email \(can be outdated or unavailable during release preview\)](#)

## Get Records from Data Cloud Objects in Flow Builder

Now you can use Data Cloud data in the Get Records element of a flow or in Apex code. You can read data from Data Cloud data model objects (DMO), but you can't create, update, or delete Data Cloud data. For example, a customer submits a product interest form on your website. Use a flow to create a Lead record with more information in your Salesforce CRM using a Get Records element to access the data in the Data Cloud Form DMO. Data Cloud data is available only in production orgs that are connected to Data Cloud.

**Where:** This change applies to Lightning Experience and Salesforce Classic in all editions except Starter and Professional.

**When:** This functionality is available on a rolling basis after the Summer '23 release.

**Who:** To use Data Cloud objects in a Get Records element, users need Read object permissions for the data model object and Manage Flows permissions.

**How:** Add a Get Records element to a flow. Search for the Data Cloud object that you want to use. Data Cloud objects are alphabetized with Salesforce standard and custom objects.

SEE ALSO:

[Salesforce Help: Data Objects in Data Cloud](#)

[Salesforce Help: Calculated Insights](#)

## Search and Display Data Table Results in Screen Flows

Now users can search and filter their Data Table record results. The search returns the first 1,500 items. Initially, 200 records display. As you scroll through the results, additional records load progressively in groups of 100. The search results also show the number of items displayed and the total number of items found.

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

**How:** Add the Data Table component to a screen flow, and select **Show search bar**.

The screenshot shows the configuration interface for a Data Table component. At the top, there's a header with a back arrow and the title 'Data Table'. Below this, there's a section for 'API Name' with a text input field. Underneath is a 'Label' section with a text input field containing 'Data Table' and a checkbox labeled 'Use Label as the table title'. The next section is 'Configure Data Source', which includes a 'Source Collection' dropdown menu with a search bar and a magnifying glass icon. Below this, the 'Show search bar' checkbox is highlighted with an orange border. At the bottom, there are five expandable sections: 'Configure Rows', 'Configure Columns', 'Set Component Visibility', and 'Advanced', each with a right-pointing chevron.

## Provide Users a List of Choices for Easy Selection with Choice Lookup (Generally Available)

Add the Choice Lookup flow screen component to give users a filtered list to select from. For example, you can create a list of external data values, picklist values, static values, or records that you filtered when you configured the flow. This feature, now generally available, includes some changes since the last release. Initially, 20 choice options display. As you scroll, more choice options load in groups of 100, up to the maximum of 1,020. If you apply a filter after loading your initial choices, the display resets, showing the new 20 choices.

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

**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 screen component to your flow, and configure the fields. Specify the Choice resource that you created in the Choice field.

## Use Security Center Objects in Flows

Automate your processes for Security Center data. Now you can create record-triggered flows based on Security Center objects.

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

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

**How:** From Setup, in the Quick Find box, enter *Flow*, and then select **Flows**. Click **New Flow**, then click **Record-Triggered Flow**, and click **Create**. You can then select the Security Center objects.

SEE ALSO:

[Automate Processes for Security Center Data with Flows](#)

## Get Field Visibility Errors during Flow Runtime

If you have field visibility errors in your flow, the flow now stops running and presents an error message. Previously, you didn't get an error message, and the flow continued to run.

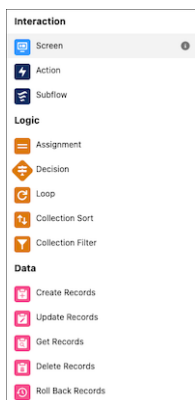
**Where:** This feature is new in both Lightning Experience and Salesforce Classic. However, it is only supported in Lightning runtime for flows.

## Get Improved Accessibility in Flow Builder with New Element Colors

Creating flows is easier with new element colors that meet accessibility guidelines.

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



**Why:** The previous Flow Builder element colors didn't meet accessibility guidelines. The new colors increase usability because they have higher contrast.

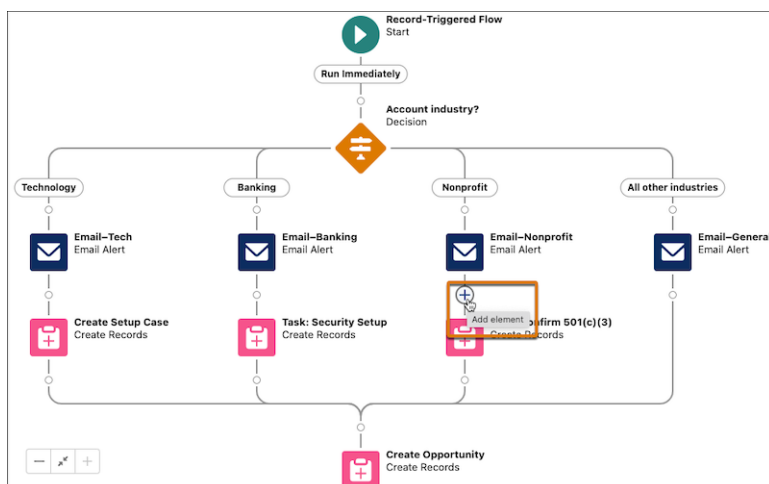


## View More Elements on the Flow Builder Canvas

Now you can see more elements on the Flow Builder canvas with a new compact layout and a smaller Add Element button. Previously, elements were further spread out, requiring you to move the canvas more frequently to see additional elements.

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

**How:** To add an element using the updated Add Element button, hover over  and click . Then, select an element from the element menu.



## Reference Choice Sets Only in Choice Components

When configuring flow screen components, Flow Builder only lets you reference record choice sets, collection choice sets, or picklist choice sets from a single location - a choice component's data source. Previously you could set the reference from several other places such as conditions, filters, or component default values, but those references were unsupported and could generate an error. Now you won't see these options as a choice in places where they are no longer allowed.

If you have unsupported references in existing flows, don't worry: your flows continue to run as they did in 'Spring 23. This change ensures that no new flows contain unsupported references.

This change doesn't apply to the standalone Choice resource.

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

## Flow Trigger Explorer

View more record-triggered flows in Flow Trigger Explorer.

### IN THIS SECTION:

[View Standard Flows in Flow Trigger Explorer](#)

Standard flows that contain triggers now appear in Flow Trigger Explorer. A Standard flow is a flow shipped by Salesforce. Now you can see when a Standard flow executes in relation to your other record-triggered flows. You can't reorder a Standard flow, but you can order your other flows around it.

## View Standard Flows in Flow Trigger Explorer

Standard flows that contain triggers now appear in Flow Trigger Explorer. A Standard flow is a flow shipped by Salesforce. Now you can see when a Standard flow executes in relation to your other record-triggered flows. You can't reorder a Standard flow, but you can order your other flows around it.

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

## Flow and Process Management

We disabled the creation of new Process Builder processes, but you can still activate, deactivate, and edit them. Convert processes with scheduled actions to flows with the Migrate to Flow tool. Delete a flow or process version from a managed package.

### IN THIS SECTION:

#### [New Process Creation Is No Longer Available](#)

To take the next step toward retiring Process Builder processes, you can no longer create new processes. You can still activate, deactivate, and edit your existing Process Builder processes and continue to create automations in Flow Builder. To test and create processes for use in managed packages, developer orgs still allow you to create processes. Most Process Builder use cases are now supported in and work better in Flow. To facilitate migrating your processes, use the Migrate to Flow tool.

#### [Convert More Processes to Flows with the Migrate to Flow Tool](#)

The updated Migrate to Flow tool can help your transition to Flow Builder, and you can now use it to migrate Process Builder processes that contain scheduled actions. A scheduled action is migrated as a scheduled path in a flow. The Migrate to Flow tool takes care of all pending scheduled actions from the original process at flow runtime. After migrating a process, you can test the flow in Flow Builder. If everything works as expected, activate the flow and deactivate the process that you converted.

#### [Delete Flows from Second-Generation Managed Packages](#)

Clean up your second-generation managed packages by deleting flows. Removing unused flows in the package makes it easier for subscribers to set up flows because of less clutter. Previously, you couldn't delete flows in second-generation packages, so unused flows piled up.

#### [Find Flow User Permissions More Easily](#)

Flow user permissions are now all consolidated under a new Flow and Flow Orchestration section in App Permissions. Previously, they were dispersed throughout System Permissions.

## New Process Creation Is No Longer Available

To take the next step toward retiring Process Builder processes, you can no longer create new processes. You can still activate, deactivate, and edit your existing Process Builder processes and continue to create automations in Flow Builder. To test and create processes for use in managed packages, developer orgs still allow you to create processes. Most Process Builder use cases are now supported in and work better in Flow. To facilitate migrating your processes, use the Migrate to Flow tool.

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

## Convert More Processes to Flows with the Migrate to Flow Tool

The updated Migrate to Flow tool can help your transition to Flow Builder, and you can now use it to migrate Process Builder processes that contain scheduled actions. A scheduled action is migrated as a scheduled path in a flow. The Migrate to Flow tool takes care of all pending scheduled actions from the original process at flow runtime. After migrating a process, you can test the flow in Flow Builder. If everything works as expected, activate the flow and deactivate the process that you converted.

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

**How:** From Setup, in the Quick Find box, enter *Migrate to Flow*, and then select **Migrate to Flow**. Select the process that you want to convert into a flow, click **Migrate to Flow**, and select the criteria that you want to migrate.

## Delete Flows from Second-Generation Managed Packages

Clean up your second-generation managed packages by deleting flows. Removing unused flows in the package makes it easier for subscribers to set up flows because of less clutter. Previously, you couldn't delete flows in second-generation packages, so unused flows piled up.

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

SEE ALSO:

[Salesforce DX Developer Guide: Remove Metadata Components from Second-Generation Managed Packages \(can be outdated or unavailable during release preview\)](#)

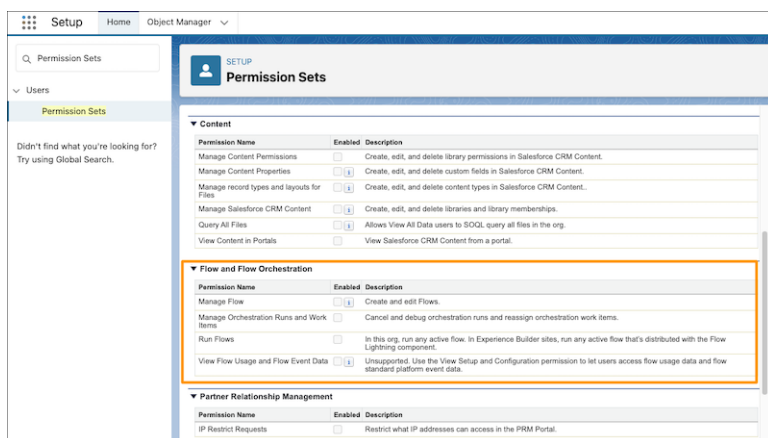
[Salesforce DX Developer Guide: Components Available in Managed Packages \(can be outdated or unavailable during release preview\)](#)

## Find Flow User Permissions More Easily

Flow user permissions are now all consolidated under a new Flow and Flow Orchestration section in App Permissions. Previously, they were dispersed throughout System Permissions.

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

**How:** For example, you want to add flow user permissions to a permission set. From Setup, in the Quick Find box, enter *Permission Sets*, and then select **Permission Sets**. Next, select the permission set you want to manage, and then click **App Permissions**. Last, select the permissions that you want to add.



## Flow Extensions

Convert MuleSoft REST APIs into invocable actions. Use multi-select picklists in screen flows for Flow in Slack. Use more data types in flow screen input parameters for Flow in Slack.

IN THIS SECTION:

[Import REST APIs Directly from MuleSoft Services](#)

Create low-code, process-based integrations by importing REST APIs from the MuleSoft Services page in Setup. View and manage your available REST APIs from Anypoint Exchange, and convert API operations into invocable actions in Salesforce.

[Use Multi-Select Picklists with Flow in Slack](#)

Screens in flows that run in Slack can contain the Multi-Select Picklist screen component.



### [Use More Data Types as Slack Input Parameters](#)

Screens in flows that run in Slack now support the Boolean, Currency, Date, Date Time, and Number data types as flow input parameters.

## Import REST APIs Directly from MuleSoft Services

Create low-code, process-based integrations by importing REST APIs from the MuleSoft Services page in Setup. View and manage your available REST APIs from Anypoint Exchange, and convert API operations into invocable actions in Salesforce.

**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**. Log in to MuleSoft AnyPoint, and click **Import**.

## Use Multi-Select Picklists with Flow in Slack

Screens in flows that run in Slack can contain the Multi-Select Picklist screen component.

**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 **Make Available in Slack** in the Advanced area of the Save the Flow dialog box.

## Use More Data Types as Slack Input Parameters

Screens in flows that run in Slack now support the Boolean, Currency, Date, Date Time, and Number data types as flow input parameters.

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

## Flow and Process Release Updates

Salesforce Flow has several release updates that are scheduled to be enforced in future releases.

### IN THIS SECTION:

#### [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. This update was scheduled for enforcement in Summer '20 but was postponed to Summer '25. This update was also previously scheduled for enforcement in Winter '21, Winter '22, and 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. 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 Spring '24.

#### [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 EmailSimple Invocable Action to Respect Organization-Wide Profile Settings \(Release Update\)](#)

With this update enabled, the EmailSimple invocable action adheres to organization-wide email address profile settings.

#### [Enforce Rollbacks for Apex Action Exceptions in REST API \(Release Update\)](#)

This update preserves data integrity by rolling back transactions that end in an exception. When you execute an Apex action using REST API, the API doesn't change Salesforce data if that exception occurs. This update, originally named Enforce Rollbacks for Custom Invocable Action Exceptions in Connect REST API, was first made available in Spring '23 and was scheduled to be enforced in Winter '24, but we postponed the enforcement date to Spring '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 run time. 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.

#### [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.

### 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. This update was scheduled for enforcement in Summer '20 but was postponed to Summer '25. This update was also previously scheduled for enforcement in Winter '21, Winter '22, and Summer '23..

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

**When:** Salesforce enforces this update in 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](#)

### 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. 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 Spring '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 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.

**How:** To apply this update, from Setup, in the Quick Find box, enter *Release Updates*, and then select **Release Updates**. For Prevent Guest User from Editing or Deleting Approval Requests, follow the testing and activation steps.

SEE ALSO:

[Release Updates](#)

## Disable 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:** 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 Disable Rules for Enforcing Explicit Access to Apex Classes, follow the testing and activation steps.

SEE ALSO:

[Release Updates](#)

## Enable EmailSimple Invocable Action to Respect Organization-Wide Profile Settings (Release Update)

With this update enabled, the EmailSimple invocable action adheres to organization-wide email address profile settings.

**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 '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 EmailSimple 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 Enable EmailSimple Invocable Action to Respect Organization-Wide Profile Settings release update, follow the testing and activation steps.

## Enforce Rollbacks for Apex Action Exceptions in REST API (Release Update)

This update preserves data integrity by rolling back transactions that end in an exception. When you execute an Apex action using REST API, the API doesn't change Salesforce data if that exception occurs. This update, originally named Enforce Rollbacks for Custom Invocable Action Exceptions in Connect REST API, was first made available in Spring '23 and was scheduled to be enforced in Winter '24, but we postponed the enforcement date to Spring '24.

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

**How:** Before you apply this update, review your Apex-defined invocable actions and ensure that they don't generate exceptions when executed. If the output isn't void, ensure that inputs and outputs match on both the size and order. Then, from Setup, in the Quick Find

box, enter *Release Updates*, and then select **Release Updates**. To get the Enforce Rollback for Apex Action Exceptions in REST API release update, follow the testing and activation steps.

SEE ALSO:

[Release Updates](#)

## Disable Access to Session IDs in Flows (Release Update)

To improve security, this update prevents flow interviews from resolving the `$Api.Session_ID` variable at run time. Previously, when a flow screen included the `$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 all 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.

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

## Flow Orchestration

Control the context that your autolaunched orchestration, background steps, and evaluation flows run in. Use the new MuleSoft step to run MuleSoft actions from an orchestration. Add comments to orchestration run logs, list views, and detail views. Benefit from refreshed record and record collection variables after an orchestration running on version 58.0 resumes.

#### IN THIS SECTION:

[Get Refreshed Record Variables When an Orchestration Resumes](#)

When you reference a record variable or a record collection in an orchestration configured to run on API version 58.0 and later, records are refreshed with their latest values each time the orchestration run resumes. In an autolaunched orchestration run, all referenced records are refreshed. In a record-triggered orchestration, all referenced records except `$Record_Prior` are refreshed. To refresh record variables in an existing orchestration, save a new copy and set the API version to 58.0 or later. Record values aren't visible in the debugger details for an orchestration run.

[Control the Running Context of an Orchestration](#)

Choose the context to launch and resume an autolaunched orchestration to control the access associated orchestration runs have to Salesforce data. The selected context also controls the record-level access for evaluation flows and background steps when the associated orchestration runs in a system context. A record-triggered orchestration always runs and resumes in system context. For orchestrations running on API version 58.0 and later, the context used to resume an orchestration is always the context of how the orchestration was launched.

[Create Steps to Run MuleSoft Actions](#)

You can now call a MuleSoft action from a step in your orchestration. The step runs asynchronously in system context.

#### [Add Custom Information to Flow Orchestration Logs](#)

Keep better track of orchestration progress by logging custom information for interactive and background steps. To set custom information, add a text variable named `Comments` that's available for output to the step's flow and assign a value to the variable.

#### [See Orchestration Work Items on the To Do List](#)

You can now view orchestration work items in the To Do list.

#### [Enable Sharing for Flow Orchestration Objects \(Release Update\)](#)

In Summer '23, Salesforce enables sharing for Flow Orchestration objects. With this change the Manage Flow user permission no longer grants user access to Flow Orchestration objects. To cancel or debug an orchestration or to reassign an orchestration work item, a user needs the Manage Orchestration Runs and Work Items user permission, along with sharing 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.

## Get Refreshed Record Variables When an Orchestration Resumes

When you reference a record variable or a record collection in an orchestration configured to run on API version 58.0 and later, records are refreshed with their latest values each time the orchestration run resumes. In an autolaunched orchestration run, all referenced records are refreshed. In a record-triggered orchestration, all referenced records except `$Record_Prior` are refreshed. To refresh record variables in an existing orchestration, save a new copy and set the API version to 58.0 or later. Record values aren't visible in the debugger details for an orchestration run.

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

SEE ALSO:

[Salesforce Help: Use Automatic Output In Orchestrations \(can be outdated or unavailable during release preview\)](#)

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

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

## Control the Running Context of an Orchestration

Choose the context to launch and resume an autolaunched orchestration to control the access associated orchestration runs have to Salesforce data. The selected context also controls the record-level access for evaluation flows and background steps when the associated orchestration runs in a system context. A record-triggered orchestration always runs and resumes in system context. For orchestrations running on API version 58.0 and later, the context used to resume an orchestration is always the context of how the orchestration was launched.

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

**How:** In the autolaunched orchestration's Edit version properties window, under Advanced, select an option from the How to Run the Orchestration dropdown.

SEE ALSO:

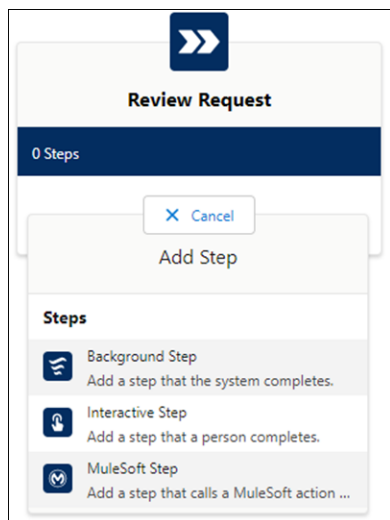
[Salesforce Help: Running Context of an Orchestration \(can be outdated or unavailable during release preview\)](#)

## Create Steps to Run MuleSoft Actions

You can now call a MuleSoft action from a step in your orchestration. The step runs asynchronously in system context.

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

**How:** From an orchestration stage's Add Step menu, select **MuleSoft Step**.



Enter information about the step, and select the MuleSoft action that you want to run.

SEE ALSO:

[Salesforce Help: Flow Orchestration MuleSoft Steps \(can be outdated or unavailable during release preview\)](#)

## Add Custom Information to Flow Orchestration Logs

Keep better track of orchestration progress by logging custom information for interactive and background steps. To set custom information, add a text variable named **Comments** that's available for output to the step's flow and assign a value to the variable.

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

**How:** In a flow called by an orchestration step, add a **Comments** text variable and select **Available for output**. You can't use variables internal to a flow, output variables of types other than text, and other casing of **Comments** to add custom information to the orchestration run log.

Assign the text that you want to appear in the Orchestration Run Log to the Comments variable. You can also set the Comments variable to a flow resource—a constant, variable, text template, or formula—that contains your text when the flow runs.

When a step calls the flow in an orchestration, the string assigned to the Comments variable appears in the associated orchestration run log list and detail views.

SEE ALSO:

[Salesforce Help: Add Comments to the Orchestration Run Log \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Add a Comments Column to the Orchestration Run Log \(can be outdated or unavailable during release preview\)](#)

## See Orchestration Work Items on the To Do List

You can now view orchestration work items in the To Do list.

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

SEE ALSO:

[Manage Flow Orchestration Work Items in the To Do List](#)



## Enable Sharing for Flow Orchestration Objects (Release Update)

In Summer '23, Salesforce enables sharing for Flow Orchestration objects. With this change the Manage Flow user permission no longer grants user access to Flow Orchestration objects. To cancel or debug an orchestration or to reassign an orchestration work item, a user needs the Manage Orchestration Runs and Work Items user permission, along with sharing 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.

SEE ALSO:

[Release Updates](#)

## Other Changes to Flow Orchestration

Learn about improvements to Flow Orchestration.

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

### Draft Orchestrations with Flow Orchestration

Save draft orchestrations that contain steps with no associated flow selected. Before you activate the parent orchestration, you must associate all interactive and background steps with a flow.

### New Look for Orchestration Step Properties Panel

The Properties panel for Flow Orchestration steps has new labels and info bubbles. For interactive steps, the order of the assignee and context record sections has also changed.

### Permissions Change for Firing a Flow Orchestration Event

Users no longer must have the Manage Orchestration Runs and Work Items permission to fire a Flow Orchestration Event without a step ID.

### Start Properties Panel Opens for New Flow-Triggered Orchestrations

Now when you create a record-triggered orchestration, the Properties panel for the Start element automatically opens on the canvas in Flow Builder. And, a default object is no longer set for the record trigger, making it easier to select the object whose records trigger the orchestration.

### Step Output Available Only After Step Completion

For orchestrations running in API version 58.0 and later, when a step uses an evaluation flow as an exit condition, the step's output is available only after the step is marked complete.

## OmniStudio

Accessibility improvements enable screen readers to accurately render the OmniScript runtime experience. The name of the Standard OmniStudio Runtime setting changed.

## IN THIS SECTION:

### [Get a Better Screen Reader Experience with Accessibility Improvements](#)

Accessibility improvements ensure that screen readers more accurately render the OmniScript runtime experience for users.

### [Standard OmniStudio Runtime Name Is Changing](#)

To ensure that the purpose of the setting is clear, the name of the Standard OmniStudio Runtime setting is changing to Managed Package Runtime. This setting is now enabled by default. While the name of the setting has changed, your org works as it did before the upgrade.

### [OmniStudio Minor Release Updates](#)

Find out about bug fixes, minor updates, and known issues about OmniStudio made after the Summer '23 major release and before the next major release. If you're using the standard objects model, refer to these notes.

## Get a Better Screen Reader Experience with Accessibility Improvements

Accessibility improvements ensure that screen readers more accurately render the OmniScript runtime experience for users.

**Where:** This change applies to Lightning Experience, Experience Builder sites, and all versions of the mobile app in Enterprise, Performance, and Unlimited editions where OmniStudio is enabled. This change takes effect when you upgrade Salesforce or when you upgrade your OmniStudio, Insurance, Public Sector, or Communications, Media, and Energy managed package to version 244.

**How:** Screen readers can now:

- Navigate to read-only Lookup, Select, and Text elements.
- Navigate to Edit Block elements that you set up in Table mode.
- Select a value in a Typeahead element, and then tab away from the element while retaining the selected value.
- Read asterisks to indicate required fields.
- Read the accessible labels for ProgressBar and Tooltip Lightning web components (LWC).
- Read the headings in Accordion LWCs.
- Understand when a Block element is expanded or collapsed.
- Open, close, and then reopen help text as needed.
- Skip over Image elements that aren't interactive.

## Standard OmniStudio Runtime Name Is Changing

To ensure that the purpose of the setting is clear, the name of the Standard OmniStudio Runtime setting is changing to Managed Package Runtime. This setting is now enabled by default. While the name of the setting has changed, your org works as it did before the upgrade.

**Where:** This change applies to Lightning Experience, Experience Builder sites, and all versions of the mobile app in Enterprise, Performance, and Unlimited editions where OmniStudio is enabled. This change takes effect when you upgrade Salesforce and isn't tied to an OmniStudio managed package.

**Why:** When you disable Managed Package Runtime, all OmniScripts and FlexCards use standard runtime. Additionally, you can clone and update standard content and activate your content 70% faster.

Because custom object-based content can't run in standard runtime, disable Managed Package Runtime only after you migrate all your content from the custom object data model to the standard data model. Also ensure that the OmniStudio designers save in the standard data model.

When Managed Package Runtime is enabled, standard OmniStudio runtime remains enabled. OmniStudio also generates a custom Lightning web component for each OmniScript and FlexCard that you activate.

**How:** To view the setting, from Setup, in the Quick Find box, enter *OmniStudio Settings*, and then select **OmniStudio Settings**.

- If Standard OmniStudio Runtime was enabled when you upgraded, Managed Package Runtime is disabled.
- If Standard OmniStudio Runtime was disabled, Managed Package Runtime is enabled.

When you change the Managed Package Runtime setting, deactivate and then activate existing OmniScripts and FlexCards to change their runtime.

## OmniStudio Minor Release Updates

Find out about bug fixes, minor updates, and known issues about OmniStudio made after the Summer '23 major release and before the next major release. If you're using the standard objects model, refer to these notes.

[OmniStudio Summer '23 Minor Release Updates](#)

For the OmniStudio package links to install minor releases, see [OmniStudio Release Summary for Installation and Upgrade](#).

## Salesforce for Slack Integrations

---

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

For the latest updates, see the [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

---

Multi-factor authentication (MFA) and enhanced domains rollouts continue. Track file activities with File Event for Event Monitoring. Automate processes for Security Center data with flows. Build native identity experiences with new and improved Headless Identity APIs. And host preference forms via your own Salesforce instance.

### IN THIS SECTION:

#### [Backup and Restore](#)

The Backup and Restore managed package has a fresh new UI. Label updates, in-app guidance, and clearer log detail pages help you better prepare for, build, monitor, and maintain your backup policy. Restore page updates make finding and choosing records for restoration easier.

#### [Domains](#)

Enhanced domains are deployed, and Salesforce Edge Network is enabled on a rolling basis. You can determine the origin of My Domain redirections, and multiple improvements help you configure and maintain your custom domains.

#### [Identity and Access Management](#)

MFA auto-enablement is in effect for the second phase of orgs. Monitor and enhance login security with new tracking tools and hybrid flows. Explore new ways to customize user registration, password recovery, and single sign-on experiences. Enhance the performance of authorization flows with new JSON capabilities.

### Privacy Center

Host preference forms via your own Salesforce instance—there's no need for an Experience Cloud site or external site. Use Field Audit Trail to track changes to consent management objects. And learn more about Preference Manager with the new Trailhead badges.

### Salesforce Shield

Extend your security and monitoring reach with more Shield functionality. View consolidated information about your encryption policies in Security Center. Real-time event and event log file coverage expands to track more file activity, URL redirect sources, and OAuth flows. And the period for opting into or out of generating event log files is enforced.

### Security Center

Automate processes for Security Center data with flows. Deploy mobile app Security policies with a new Security policy type. Track changes to encryption policies and track the login count for external users with new Security Center metrics. Run Security Center features on Government Cloud orgs.

### 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

Content sniffing protection is enforced. Assign external credentials with permission set groups and profiles. To calibrate access, link OAuth scopes to principals in external credentials and select from more HTTP referrer policy options. And you can create and manage named credentials with Connect API.

## Backup and Restore

The Backup and Restore managed package has a fresh new UI. Label updates, in-app guidance, and clearer log detail pages help you better prepare for, build, monitor, and maintain your backup policy. Restore page updates make finding and choosing records for restoration easier.

### IN THIS SECTION:

#### [Set Up and Maintain Backups More Easily](#)

Version 2.0.0 of the Backup and Restore app introduces a fresh new look that makes it easier to set up and maintain data backups. Improved page design and clearer labels help you find the information you need faster. The Backup page autosaves when you add or remove objects to your policy. And in-app guidance provides tips to help you configure your settings and prepare a smart backup strategy.

#### [Filter and Restore Data More Easily](#)

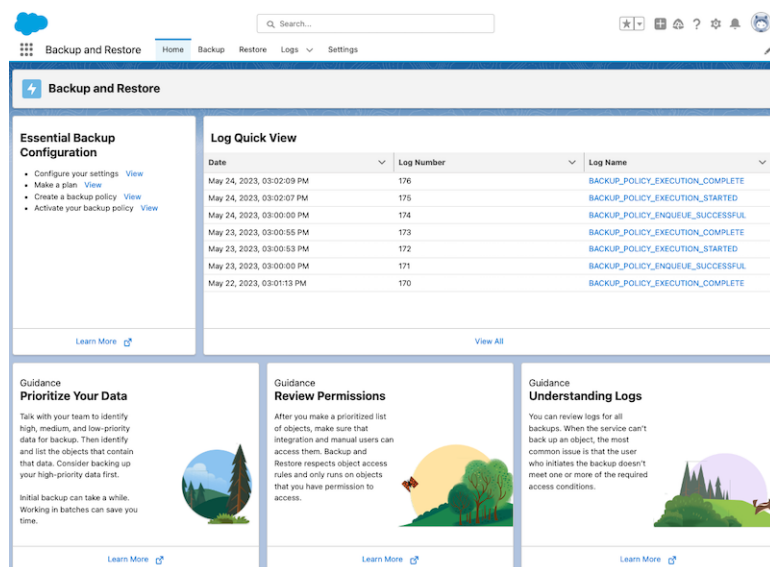
In version 2.4 of the Backup and Restore managed package, the Restore page is redesigned to streamline finding, viewing, and choosing which data to restore. Fewer screens with clearer messaging walk you through filtering backups to find the right version of your data to restore. Review related objects and records more easily and build restore jobs around logical record groupings.

## Set Up and Maintain Backups More Easily

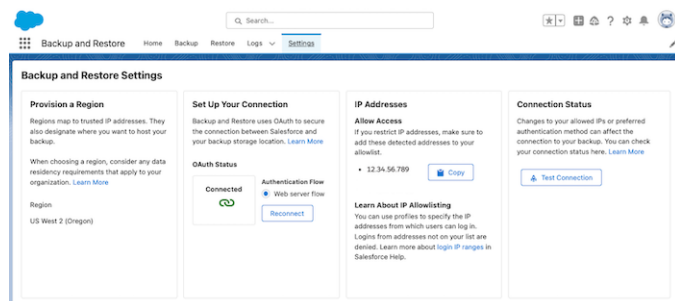
Version 2.0.0 of the Backup and Restore app introduces a fresh new look that makes it easier to set up and maintain data backups. Improved page design and clearer labels help you find the information you need faster. The Backup page autosaves when you add or remove objects to your policy. And in-app guidance provides tips to help you configure your settings and prepare a smart backup strategy.

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

**How:** On the Home page, you can now see the latest backup and restore jobs. Quick links take you to common policy maintenance tasks, and guidance cards provide tips for how to create your backup strategy.



The Settings page now progressively walks you through each step of the setup flow. It also presents clearer iconography to help you monitor your OAuth status and guidance for choosing the right region and building your list of trusted IP addresses.



And when you view a log's details to troubleshoot backup errors, you can now view just the objects that weren't backed up. Spot partial backups faster, and get right to the objects that need your attention.

SEE ALSO:

[Salesforce Help: Protect Your Data with Salesforce Backup and Restore](#)

## Filter and Restore Data More Easily

In version 2.4 of the Backup and Restore managed package, the Restore page is redesigned to streamline finding, viewing, and choosing which data to restore. Fewer screens with clearer messaging walk you through filtering backups to find the right version of your data to restore. Review related objects and records more easily and build restore jobs around logical record groupings.

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

**How:** On the Restore tab, filter records by object, date, and whether records were updated or deleted (1). When lookup relationship fields share data across objects, the nested display and field IDs help you see how restored data propagates across your implementation. Select records (2), and then continue to the next screen (3).

**Step 1: Choose Objects and Records from a Backup**

**Set Record Filters**

Start the restore process by finding backups that meet specific filter criteria.

**Select Object**

Account

**Record change type**

☐ Updated  
☐ Deleted  
☒ Both

**Date Range**

☐ Last 24 Hours  
☐ Last 7 Days  
☒ Last 30 Days  
☐ Custom

**Select Related Records and Restore**

1 records selected

Records per Page: 50

Page 1 of 1

Account Name	Record Change Type	System ModStamp
Cloud Kicks (OwnerID)	Updated	June 05, 2023 at 12:51 PM
Cloud Kicks Ltd. (OwnerID)	Updated	May 19, 2023 at 02:02 PM

Select related records that you want to restore (4). Then choose which version of updated and deleted records. If you're updating large batches of records, you can choose default restore settings to apply to large batches of data all at once (5).

**Step 2: Select Related Records and Start the Restore Process**

**Summary of Restore for Account**

Here are the records added to your restoration job so far.

**Records**

Cloud Kicks (OwnerID) (Both)

**Related Object Restoration Options**

Add related object records to your restore job. Lookup relationship field IDs are shown in parenthesis. Keep these shared data values in mind as you plan your restoration. For each selected record, choose the version to restore.

**Default Restore Actions**

Updated Records: Don't restore  
 Deleted Records: Restore to version when the parent was deleted

Related Object Name	Updated Records	Deleted Records
Entitlement (AccountID)	Restore to most recent backup	Restore to version when the parent was deleted

SEE ALSO:

[Salesforce Help: Restore Data from a Backup](#)

## Domains

Enhanced domains are deployed, and Salesforce Edge Network is enabled on a rolling basis. You can determine the origin of My Domain redirections, and multiple improvements help you configure and maintain your custom domains.

### 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.

#### [Prepare for the Move to Salesforce Edge Network](#)

Salesforce Edge Network is available on a rolling basis starting in Summer '23. If you're not already on Salesforce Edge Network, prepare for the move by reviewing the new routing settings on the My Domain Setup page. The move to Salesforce Edge Network is seamless for your users. They use the same URLs to access your org, only with a better experience, including improved download times.

### [Continue to Log My Domain Redirections](#)

With the Opt in for Event Log File Generation release update, event log generation can be disabled, which disables the Hostname Redirects log. In Summer '23 and later, when you enable My Domain hostname redirection logging, event log generation is enabled, too. If you already log My Domain hostname redirections, to continue generating that log, enable event file generation. Until you enable that setting, the Log redirections My Domain setting is disabled even if you previously enabled it.

### [Identify the Origin of Requests to Previous My Domain URLs](#)

Whether your My Domain URLs changed with enhanced domains or because you updated your My Domain name, updating references to your old URLs is easier with new fields in the redirections log.

### [Configure and Maintain Custom Domains with Confidence](#)

With a custom domain, you can serve your Experience Cloud sites or Salesforce Sites on a domain that you own. Check out the expanded documentation and improved in-app guidance for this recommended feature.

### [Validate Your Sandbox Custom Domains](#)

With a sandbox custom domain, you can test serving your Experience Cloud sites or Salesforce Sites on a domain that you own, such as <https://www.example.com>. To ensure a smooth transition when you're ready to activate that domain in production, Salesforce validates that the domain points to the org from which the sandbox was cloned. To perform this validation on an existing sandbox custom domain, view or edit the domain.

### [Identify Salesforce-Hosted Site Domains with Ease](#)

The Domains Setup page lists the domains that Salesforce hosts for your org and the domains that you own that serve your sites. To help you quickly identify the domains that Salesforce hosts, the HTTP options for Salesforce Sites and Experience Cloud sites domains changed. In an org with enhanced domains, the new HTTPS option labels are Salesforce Sites Domain and Experience Cloud Sites Domain. Previously, these labels included the words My Domain. In an org without enhanced domains, the labels are Salesforce Sites Force.com Domain and Experience Cloud Sites Force.com Domain. Previously, these labels included the word Subdomain.

### [Update the Target Hostname for Custom Domains Served by a Third-Party Service or CDN](#)

If a third-party service or content delivery network (CDN) serves your custom domain, ensure that you're using the latest recommended configuration. Third-party services use a target hostname to point your domain to your org. If you use Salesforce Edge Network and enhanced domains, there's a new recommended target hostname. Although the previous configuration continues to work, we recommend that you adopt the new target hostname standard, which can be enforced in a future release.

### [Other My Domain Changes](#)

You can't disable enhanced domains in new production orgs, and new and refreshed sandboxes always get enhanced domains by default. With this change, this option is no longer available on the My Domains Setup page: Use enhanced domains by default in new and refreshed sandboxes. However, to validate behavior without enhanced domains, you can disable the feature in a sandbox. Also, partitioned domains, which include a word related to the org type in most non-production orgs, can't be disabled in new orgs.

## 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 Summer '23. If you encounter an issue after that deployment, 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, and new production orgs created in Summer '23 can't disable enhanced domains.

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.

Until enhanced domains are enabled and deployed, admins see a reminder to enable this feature. Also, on the My Domain Setup page, a message indicates that enhanced domains are scheduled to be automatically deployed in Summer '23.

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.

#### 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](#)

## Prepare for the Move to Salesforce Edge Network

Salesforce Edge Network is available on a rolling basis starting in Summer '23. If you're not already on Salesforce Edge Network, prepare for the move by reviewing the new routing settings on the My Domain Setup page. The move to Salesforce Edge Network is seamless for your users. They use the same URLs to access your org, only with a better experience, including improved download times.

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

**When:** Salesforce enables Salesforce Edge Network on a rolling basis between Summer '23 and Winter '24. You can defer that enablement through a My Domain option, and you can disable Salesforce Edge Network within 7 days after the enablement has occurred. Salesforce notifies admins via email 60 to 90 days before the Edge enablement for their orgs. After Edge is enabled, Salesforce also notifies admins of that event.

**How:** To prepare for the move, see the [Enable Salesforce Edge Network for your Domain](#) knowledge article.

To defer the enablement of Salesforce Edge Network, from Setup, in the Quick Find box, enter *My Domain*, and then select **My Domain**. In the Routing section of the My Domain Settings page, click **Edit**, then uncheck **Enable Salesforce Edge Network as part of the scheduled rollout**, and save your changes. Repeat this step in each org where you want to opt out of the enablement.

#### SEE ALSO:

[Knowledge Article: Enable Salesforce Edge Network for your Domain](#)

[Salesforce Help: Considerations for Salesforce Edge Network \(can be outdated or unavailable during release preview\)](#)

[Trailblazer Community Group: Salesforce Edge Network Auto Enablement](#)

[Set Up a Custom Domain with Confidence with Improved In-App Guidance](#)



## Continue to Log My Domain Redirections

With the Opt in for Event Log File Generation release update, event log generation can be disabled, which disables the Hostname Redirects log. In Summer '23 and later, when you enable My Domain hostname redirection logging, event log generation is enabled, too. If you already log My Domain hostname redirections, to continue generating that log, enable event file generation. Until you enable that setting, the Log redirections My Domain setting is disabled even if you previously enabled it.

**Where:** This change applies to Lightning Experience and Salesforce Classic in Group, Essentials, Professional, Enterprise, Performance, and Unlimited editions without the Event Monitoring add-on subscription. This change also applies to Developer and Trial editions.

**How:** If you enabled the Log redirections My Domain setting in Spring '23 or earlier, to continue to receive event log files, update an Event Monitoring setting. From Setup, in the Quick Find box, enter *Event Monitoring*, select **Event Monitoring Settings**, and then turn on **Generate event log files**.

SEE ALSO:

[Opt in for Event Log File Generation \(Release Update\)](#)

[Salesforce Help: Log Redirections for My Domain Hostnames \(can be outdated or unavailable during release preview\)](#)

## Identify the Origin of Requests to Previous My Domain URLs

Whether your My Domain URLs changed with enhanced domains or because you updated your My Domain name, updating references to your old URLs is easier with new fields in the redirections log.

**Where:** This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions. The Hostname Redirects event is available in the API but not in the Event Monitoring Analytics app. This event is free for all customers with a 24-hour data retention period.

SEE ALSO:

[Track the Source of My Domain Redirections](#)

## Configure and Maintain Custom Domains with Confidence

With a custom domain, you can serve your Experience Cloud sites or Salesforce Sites on a domain that you own. Check out the expanded documentation and improved in-app guidance for this recommended feature.

**Where:** This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, and Unlimited editions. Also available in Professional edition with Marketing Cloud Account Engagement (Pardot).

SEE ALSO:

[Learn More About Custom Domain Setup and Maintenance with Expanded Content](#)

[Set Up a Custom Domain with Confidence with Improved In-App Guidance](#)

## Validate Your Sandbox Custom Domains

With a sandbox custom domain, you can test serving your Experience Cloud sites or Salesforce Sites on a domain that you own, such as <https://www.example.com>. To ensure a smooth transition when you're ready to activate that domain in production, Salesforce validates that the domain points to the org from which the sandbox was cloned. To perform this validation on an existing sandbox custom domain, view or edit the domain.

**Where:** This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, and Unlimited editions. Also available in Professional edition with Marketing Cloud Account Engagement (Pardot).

**How:** From Setup, in the Quick Find box, enter *Domains*, and then select **Domains**. To view your custom domain, click the name of the domain. If the validation process returns an error, an informational message on the Domain Detail page provides next steps.

Here's an example of the Domain Detail page for a sandbox custom domain that uses the customer's HTTPS certificate with an informational message about the configuration of the domain in DNS.

Domain  
**www.example.com** [Help for this Page](#)

**Domain Detail** [Edit](#) [Activate](#)

The DNS record for www.example.com points to www.example.com.00d0000000000000tua.sandbox.live.siteforce.com. Update the DNS record to point directly to www.example.com.00d0000000000000mai.live.siteforce.com. Visit [Salesforce Help](#) to learn how to [point your custom domain to your org](#).

Domain Name	www.example.com	Current HTTPS Option	Salesforce Cloud
Allow HSTS preloading registration	<input checked="" type="checkbox"/>	Certificate and Key	<a href="#">HTTPS Cert Jan 2023</a>
		Provisioning Status	Completed
		Associated Org	UAT
Created By	Admin User, 3/3/2021, 11:09 AM	Modified By	Admin User, 3/3/2021, 11:09 AM

[Edit](#) [Activate](#)

**Custom URLs** [New Custom URL](#) [Custom URLs Help](#)

Action	Path	Status	Site Label	Site Type
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">View</a>	/forcesite	Published	<a href="#">Site</a>	Community

SEE ALSO:

[Salesforce Help: Test Your Custom Domains in a Sandbox \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Point Your Custom Domain to Your Org \(can be outdated or unavailable during release preview\)](#)

## Identify Salesforce-Hosted Site Domains with Ease

The Domains Setup page lists the domains that Salesforce hosts for your org and the domains that you own that serve your sites. To help you quickly identify the domains that Salesforce hosts, the HTTP options for Salesforce Sites and Experience Cloud sites domains changed. In an org with enhanced domains, the new HTTPS option labels are Salesforce Sites Domain and Experience Cloud Sites Domain. Previously, these labels included the words My Domain. In an org without enhanced domains, the labels are Salesforce Sites Force.com Domain and Experience Cloud Sites Force.com Domain. Previously, these labels included the word Subdomain.

**Where:** This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, and Unlimited editions. Also available in Professional edition with Marketing Cloud Account Engagement (Pardot).

**Why:** The updated HTTPS option labels on the Domains Setup page help you quickly identify the domains that Salesforce hosts for your sites. Here are the updated labels in an org with enhanced domains.

**Domains** [Help for this Page](#)

Your org's list of My Domain, custom, site, and Experience Cloud domains. View, edit, and delete domains. Activate pending changes to the domain. Verify to external services that you own the domain.

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

Action	Domain Name ↑	Status	Pending HTTPS Option	Current HTTPS Option	Certificate and Key	Certificate Expiration Date
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Activate</a>	<a href="#">MyDomainName.my.salesforce-sites.com</a>	Completed		Salesforce Sites Domain		
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Activate</a>	<a href="#">MyDomainName.my.salesforce.com</a>	Completed		My Domain		
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Activate</a>	<a href="#">MyDomainName.my.site.com</a>	Completed		Experience Cloud Sites Domain		
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Activate</a>	<a href="#">www.example.com</a>	Completed		Content Delivery Network (CDN) Partner of Salesforce		

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

SEE ALSO:

[Salesforce Help: View Your Custom Domain Details \(can be outdated or unavailable during release preview\)](#)

## Update the Target Hostname for Custom Domains Served by a Third-Party Service or CDN

If a third-party service or content delivery network (CDN) serves your custom domain, ensure that you're using the latest recommended configuration. Third-party services use a target hostname to point your domain to your org. If you use Salesforce Edge Network and enhanced domains, there's a new recommended target hostname. Although the previous configuration continues to work, we recommend that you adopt the new target hostname standard, which can be enforced in a future release.

**Where:** This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, and Unlimited editions. Also available in Professional edition with Marketing Cloud Account Engagement (Pardot).

**How:** To determine whether your org uses Salesforce Edge Network and enhanced domains, visit the My Domain setup page.

To determine the recommended target hostname for your custom domain, on the Domains Setup page, click the name of the domain that serves your sites with this HTTPS option: Domain is served by an external host. On the Domain Detail page, look for the Target Hostname field.

**Domain** [Help for this Page](#)

**www.example.com**

**Domain Detail** [Edit](#) [Activate](#)

Domain Name	www.example.com	Current HTTPS Option	Domain is served by an external host
Allow HSTS preloading registration	<input checked="" type="checkbox"/>	External Hostname	cdn.example.com
Target Hostname <a href="#">i</a>	usa12.sfdc-yprmv18.salesforce.com	Provisioning Status	Completed
		Associated Org	Production
Created By	Admin User, 3/3/2021, 11:09 AM	Modified By	Admin User, 3/3/2021, 11:09 AM

[Edit](#) [Activate](#)

**Custom URLs** [New Custom URL](#) [Custom URLs Help](#)

Action	Path	Status	Site Label	Site Type
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">View</a>	/force-site	Published	Site	Community

Then work with your third-party service to ensure that they forward proxy or CDN requests for your domain to that hostname.

SEE ALSO:

[Salesforce Help: Prerequisites for Custom Domains That Use a Third-Party Service or CDN \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Determine Whether Enhanced Domains Are Enabled \(can be outdated or unavailable during release preview\)](#)

## Other My Domain Changes

You can't disable enhanced domains in new production orgs, and new and refreshed sandboxes always get enhanced domains by default. With this change, this option is no longer available on the My Domains Setup page: Use enhanced domains by default in new and refreshed sandboxes. However, to validate behavior without enhanced domains, you can disable the feature in a sandbox. Also, partitioned domains, which include a word related to the org type in most non-production orgs, can't be disabled in new orgs.

**Where:** This change applies to Lightning Experience and Salesforce Classic in Group, Essentials, Professional, Enterprise, Performance, and Unlimited editions. Partitioned Domains are available in Developer Edition orgs, patch orgs, scratch orgs, and Trailhead Playgrounds with enhanced domains.

SEE ALSO:

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

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

## Identity and Access Management

MFA auto-enablement is in effect for the second phase of orgs. Monitor and enhance login security with new tracking tools and hybrid flows. Explore new ways to customize user registration, password recovery, and single sign-on experiences. Enhance the performance of authorization flows with new JSON capabilities.

IN THIS SECTION:

[MFA Auto-Enablement Continues: 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. The first phase of orgs completed MFA auto-enablement in Spring '23. For orgs in the second phase, MFA is auto-enabled with Summer '23. For orgs in the third phase, MFA is auto-enabled with Winter '24. Auto-enablement concludes for any remaining orgs in Spring '24.

[Use Salesforce MFA for SSO Logins](#)

Now there's a new and better way to use the Salesforce multi-factor authentication (MFA) service for SSO logins. After you enable MFA for your users, you can easily extend it to SSO by selecting a setting on your SSO configuration page. You control which SSO configurations use a third-party MFA service and which use Salesforce MFA. And unlike the previous method for applying Salesforce MFA to SSO logins, this method is fully compatible with Visualforce pages.

[Optimize Registration for Identity Verification Methods](#)

Optimize how users register identity verification methods for multi-factor authentication (MFA) and device activation by adjusting how the registration process begins. Depending on what's most efficient for your users, you can start with a list of all supported verification methods or begin with the Salesforce Authenticator option. Easily configure the experience with a new org-wide setting.

### [Use TOTP Codes from Salesforce Authenticator More Easily](#)

If your users can't receive push notifications in Salesforce Authenticator, they can verify their identity with time-based one-time passcodes (TOTP) generated by the app. Now users can access the screen to enter TOTP codes in half the number of clicks. This update helps users verify their identity and access Salesforce more easily when they're offline or have low connectivity.

### [Configure Identity Verification Settings in One Location with an Improved User Interface](#)

To improve navigation, the Identity Verification Setup page is refreshed. Settings on this page are now grouped into sections: Verification Methods, Multi-Factor Authentication (MFA), and General. In addition, identity verification settings are now editable only on the Identity Verification Setup page. Previously, they were also editable on the Session Settings Setup page.

### [Use OAuth 2.0 Hybrid Flows for Secure Authorization](#)

Use OAuth 2.0 hybrid flows to create secure authorizations with hybrid apps or with direct integrations between two applications. Hybrid flows include the new hybrid web server flow, the renamed hybrid user agent token flow for web session management, formerly the hybrid app token flow for web session management, and the client credentials flow for server-to-server integration. Use these hybrid flows in place of user-agent, username-password, and hybrid app token flows, which present security risks.

### [Track Insecure Login Flows Through Real-Time Event Monitoring](#)

Use the `LoginEvent` and `LoginEventStream` objects in Real-Time Event Monitoring to track login flows for connected apps. Use this data to monitor use of insecure flows, including the user-agent and username-password flows.

### [Monitor Login Conditions in the Enhanced Transaction Security Framework](#)

To verify that your users' login flows are secure, you can monitor them by using the Authentication Method Reference, Login Subtype, and Login Type conditions on the `LoginEvent` object in the Enhanced Transaction Security framework.

### [OAuth 2.0 Username-Password Flow Blocked by Default in New Orgs](#)

If you create your org in Summer '23 or later, the OAuth 2.0 username-password flow is blocked by default. The username-password flow presents security risks. We recommend using the OAuth 2.0 client credentials flow instead.

### [Take the Reins on Your User Registration Experiences with Headless Registration](#)

With the new Headless Registration Flow, you can fully control the user registration experiences in a third-party app while Salesforce does the heavy lifting on the backend. Your users can register, log in, and access their data all within your app. Your app calls Headless Registration API via an Experience Cloud site to create users, authenticate them, and authorize data access.

### [Specify a User's Verification Method in the Body of Headless Registration Requests](#)

When you configure the Headless Registration Flow, include the user's identity verification method in the body of your initial POST request to Headless Registration API instead of in a header. Previously, we instructed you to specify the user's verification method in an `Auth-Verification-Type` header. But Salesforce checks only the `verificationmethod` body parameter in the initial registration request, so if you include the verification method in a header, the value doesn't get passed on to Headless Registration API.

### [Improve Security for the Headless Forgot Password Flow](#)

To enhance security, you can now add requirements for your third-party app to access Headless Forgot Password API. These requirements apply to the first step of the flow, when your app requests a password reset using a POST request. You can require your POST request to include access token issued to an internal integration user. Or you can require a reCAPTCHA token in your request.

### [Build a Native Single Sign-On Experience in a Third-Party App](#)

With a new supported parameter for the OAuth 2.0 web server flow and OAuth 2.0 user-agent flows, you can now create native single sign-on experiences in third-party apps. For example, you can natively display a button in your app that allows users to log in with Google. When a user clicks the button, the browser is bounced briefly to Salesforce, then automatically redirected to Google to log in. After the user enters their Google credentials, the browser is again redirected briefly to Salesforce before redirecting back to your app. Both redirects to Salesforce happen automatically, so it feels like the user went straight from your app to Google and back again.

### [Take More Control of Self-Registration for Customers and Partners](#)

For more control over your Experience Cloud self-registration process, you can disable the standard self-registration components on Aura and Lightning Web Runtime (LWR) sites.

### [Enhance Your Authorization Flow Efficiency with JSON Web Token \(JWT\)-Based Access Tokens \(Beta\)](#)

To improve the overall performance of your authorization flows and third-party apps, you can now enable connected apps to issue JSON Web Token (JWT)-based access tokens instead of opaque OAuth access tokens. Unlike opaque access tokens, JWT-based access tokens have a format that your app can understand. This transparent format gives you the ability to locally parse and validate tokens on your app instead of calling a Salesforce endpoint. Currently, you can't use this token to access any Salesforce APIs, but you can use it to simplify validation for your own services.

### [API Only Users Are Restricted from Accessing the User Interface via `frontdoor.jsp`](#)

For sessions that are bridged from a custom web interface using `frontdoor.jsp`, users with the API Only User permission can access the Salesforce user interface (UI) only to change and reset their passwords. They can't access any other UIs.

### [Authorize Apps to Access All Data Cloud Resources](#)

To give authorized access to all Data Cloud APIs, you can assign a connected app the new `cdp_api` OAuth scope.

### [Upgrade to Identity Connect 7.1.5](#)

To get the latest security enhancements, upgrade from your current version of Identity Connect to Identity Connect 7.1.5. Identity Connect 7.1.5 adds to the extensive security improvements introduced in Identity Connect 7.1.1. If you're using Identity Connect 2.1 or Identity Connect 3.0.X.X, you must upgrade to Identity Connect 7.1.5 as soon as possible. As of Winter '22, you can no longer download Identity Connect 2.1 and Identity Connect 3.0.X.X.

### [Identity Connect 3.0.1.2 Security Patch Is Being Removed](#)

Because Identity Connect 3.0.1.2 isn't supported, the Identity Connect 3.0.1.2 Security Patch is no longer available as of Winter '24. The Implementation Guides for Identity Connect versions 3.0.1.2 and 2.1.0 will be removed at the same time.

### [Verify User Email Addresses](#)

To protect your org and user data, ensure that your users have a verified email address. You can now manage email verification with simple UI tools instead of code. While viewing a user's details, you can see whether their email address is verified and initiate verification with a few clicks. Your users can also see their email address status and begin verification for themselves. To finish verifying, they click a link received at their unverified email address.

### [Update U2F Security Keys to Support WebAuthn Authentication](#)

To work with Salesforce, U2F security keys must be updated to use WebAuthn authentication. The update process works seamlessly behind the scenes. For new security keys, the update occurs automatically when a user registers it for their Salesforce account. For U2F security keys that were registered prior to Summer '22, users simply need to log in with their key before the Winter '24 release. Doing so automatically updates the key. If a user misses this window, they can still update their key after Winter '24 by re-registering it for their Salesforce account.

### [Set Your Users' Session Timeout to 90 Minutes](#)

For more flexibility, you can now set the session timeout value in Session Settings to 90 minutes.

### [See When an Access Token Response Contains a JSON Web Token \(JWT\)-Based Access Token \(Beta\)](#)

To differentiate JWT-based access tokens from opaque access tokens, the token response from a JWT-enabled connected app now contains a parameter to specify the token format.

### [Use the OAuth Client Credentials Flow in More Editions](#)

For more flexibility with the OAuth 2.0 client credentials flow, the flow execution user specified in your connected app is no longer required to have the API Only User permission. Now that we removed this requirement, you can set up this flow in all editions. Previously, because this user permission was available only in Enterprise Edition, it wasn't possible to configure a connected app for the client credentials flow in any other editions.

### Hover Text Label for Client Credentials Flow Execution User Is Changed

To fix an inaccurate statement, we changed the hover text for the OAuth 2.0 client credentials execution user on the Manage Connected Apps page. Previously, the hover text stated that the execution user, also known as the Run As user, must have the API Only User permission. Because we removed this requirement in Summer '23, we removed the statement from the hover text.

## MFA Auto-Enablement Continues: 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. The first phase of orgs completed MFA auto-enablement in Spring '23. For orgs in the second phase, MFA is auto-enabled with Summer '23. For orgs in the third phase, MFA is auto-enabled with Winter '24. Auto-enablement concludes for any remaining orgs in Spring '24.

**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 2 orgs:** The release update for this phase was made available in Spring '23 and goes into effect with 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. Note that the MFA release update usually takes effect when your org is updated to Summer '23, but in some cases a delay of several hours to a few days is possible before MFA is auto-enabled for your users.
- **Phase 3 orgs:** If you see the release update after Summer '23 finishes rolling out, your org is scheduled to be auto-enabled in Winter '24. In rare cases, it can take several weeks for the update to appear after the Summer '23 rollout is complete.
- For orgs not included in phases 1–3, the release update will be available in Winter '24.

**How:** The release update automatically turns on this setting: Require multi-factor authentication (MFA) for all direct UI logins to your Salesforce org. MFA isn't enforced at this stage, so you can turn off the setting if your users aren't ready yet. Users who have the Multi-Factor Authentication for User Interface Logins user permission experience no changes when the setting is enabled.

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 that 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 must be manually excluded from MFA before MFA auto-enablement occurs. See [Exclude Exempt Users from MFA](#) (can be outdated or unavailable during release preview) 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 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 5 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 remove the option to disable it.
  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.

#### IN THIS SECTION:

##### [MFA Auto-Enablement Comes with an Improved Registration Experience](#)

Now it's easier for your users to register identity verification methods when multi-factor authentication (MFA) is auto-enabled for your org. The new registration process begins with a list of all supported verification methods instead of just the Salesforce Authenticator option. With this experience, users can immediately choose their preferred verification method. To prioritize using Salesforce Authenticator, you can revert to the original experience from Setup.

#### SEE ALSO:

##### [Multi-Factor Authentication \(MFA\) Auto-Enablement Continues with Summer '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](#)

## MFA Auto-Enablement Comes with an Improved Registration Experience

Now it's easier for your users to register identity verification methods when multi-factor authentication (MFA) is auto-enabled for your org. The new registration process begins with a list of all supported verification methods instead of just the Salesforce Authenticator option. With this experience, users can immediately choose their preferred verification method. To prioritize using Salesforce Authenticator, you can revert to the original experience from Setup.

**When:** Beginning in Summer '23, the new registration experience takes effect when MFA is auto-enabled for an org. To see your org's timeline, check out [MFA Auto-Enablement Continues: Find Out When and How Your Org Is Affected \(Release Update\)](#) on page 621.

**How:** To disable the new registration experience and revert to starting with the Salesforce Authenticator option, see [Optimize the Registration Experience for Identity Verification Methods](#) on page 623.

## Use Salesforce MFA for SSO Logins

Now there's a new and better way to use the Salesforce multi-factor authentication (MFA) service for SSO logins. After you enable MFA for your users, you can easily extend it to SSO by selecting a setting on your SSO configuration page. You control which SSO configurations use a third-party MFA service and which use Salesforce MFA. And unlike the previous method for applying Salesforce MFA to SSO logins, this method is fully compatible with Visualforce pages.

**How:** To apply Salesforce MFA to SSO logins using the new and improved method, see [Salesforce Help: Use Salesforce MFA for SSO](#) (can be outdated or unavailable during release preview).

If you previously used Salesforce MFA for SSO by applying a high-assurance session security requirement to user profiles, another step is required to update your implementation. After you enable the new method, remove the high-assurance session security requirement from user profiles.

#### SEE ALSO:

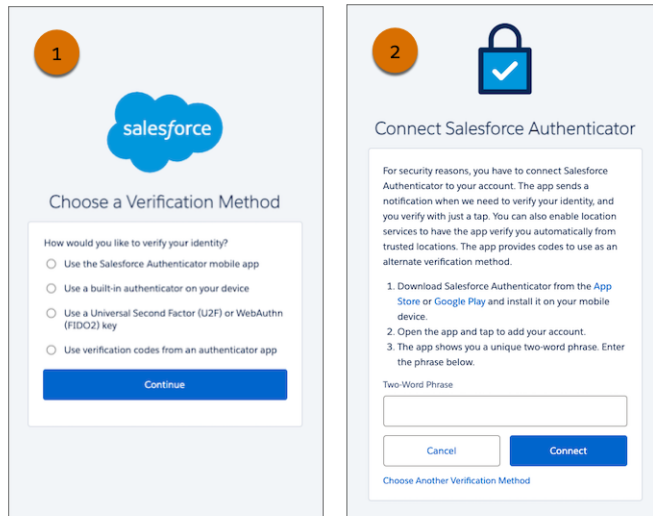
[Knowledge Article: Reset Session Security Settings for Your Salesforce MFA for SSO Configuration](#)



## Optimize Registration for Identity Verification Methods

Optimize how users register identity verification methods for multi-factor authentication (MFA) and device activation by adjusting how the registration process begins. Depending on what's most efficient for your users, you can start with a list of all supported verification methods or begin with the Salesforce Authenticator option. Easily configure the experience with a new org-wide setting.

**How:** When the new setting is enabled, the registration experience begins with a screen to choose from a list of verification methods (1). When the setting is disabled, the Connect Salesforce Authenticator screen appears first (2).



To configure the registration experience, select or deselect the new org setting in Identity Verification Setup: **Show all verification method registration options instead of starting with Salesforce Authenticator**.

### SEE ALSO:

[Salesforce Help: Decide How Users Select a Verification Method During the Registration Process \(can be outdated or unavailable during release preview\)](#)

[MFA Auto-Enablement Continues: Find Out When and How Your Org Is Affected \(Release Update\)](#)

## Use TOTP Codes from Salesforce Authenticator More Easily

If your users can't receive push notifications in Salesforce Authenticator, they can verify their identity with time-based one-time passcodes (TOTP) generated by the app. Now users can access the screen to enter TOTP codes in half the number of clicks. This update helps users verify their identity and access Salesforce more easily when they're offline or have low connectivity.

### SEE ALSO:

[Salesforce Help: Use TOTP Codes When Push Notifications Are Unavailable in Salesforce Authenticator \(can be outdated or unavailable during release preview\)](#)

## Configure Identity Verification Settings in One Location with an Improved User Interface

To improve navigation, the Identity Verification Setup page is refreshed. Settings on this page are now grouped into sections: Verification Methods, Multi-Factor Authentication (MFA), and General. In addition, identity verification settings are now editable only on the Identity Verification Setup page. Previously, they were also editable on the Session Settings Setup page.

### SEE ALSO:

[Salesforce Help: Define Identity Verification Settings for Your Orgs and Experience Cloud Sites \(can be outdated or unavailable during release preview\)](#)

## Use OAuth 2.0 Hybrid Flows for Secure Authorization

Use OAuth 2.0 hybrid flows to create secure authorizations with hybrid apps or with direct integrations between two applications. Hybrid flows include the new hybrid web server flow, the renamed hybrid user agent token flow for web session management, formerly the hybrid app token flow for web session management, and the client credentials flow for server-to-server integration. Use these hybrid flows in place of user-agent, username-password, and hybrid app token flows, which present security risks.

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

**Why:** The OAuth user-agent, username-password, and hybrid app token flows can expose user credentials to security risks. If you create your org in Summer '23 or later, the OAuth 2.0 username-password flow is blocked by default. We recommend that you use alternate flows for improved security. To prevent developers from using insecure flows to build integrations, you can block these flows in OAuth and OpenID Connect Settings.

## Track Insecure Login Flows Through Real-Time Event Monitoring

Use the LoginEvent and LoginEventStream objects in Real-Time Event Monitoring to track login flows for connected apps. Use this data to monitor use of insecure flows, including the user-agent and username-password flows.

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

**Why:** The OAuth user-agent and username-password flows can expose user credentials to security risks. Monitor these flows to identify security risks, and use alternate flows to improve security. In place of the user-agent flow for external web apps, we recommend using the OAuth 2.0 web server flow with Proof Key for Code Exchange (PKCE). In place of the username-password flow, we recommend using the OAuth 2.0 client credentials flow. To prevent developers from using insecure flows to build integrations, you can block these flows in OAuth and OpenID Connect Settings. If you create your org in Summer '23 or later, the OAuth 2.0 username-password flow is blocked by default.

### SEE ALSO:

[Track Insecure Login Flows](#)

## Monitor Login Conditions in the Enhanced Transaction Security Framework

To verify that your users' login flows are secure, you can monitor them by using the Authentication Method Reference, Login Subtype, and Login Type conditions on the LoginEvent object in the Enhanced Transaction Security framework.

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

## OAuth 2.0 Username-Password Flow Blocked by Default in New Orgs

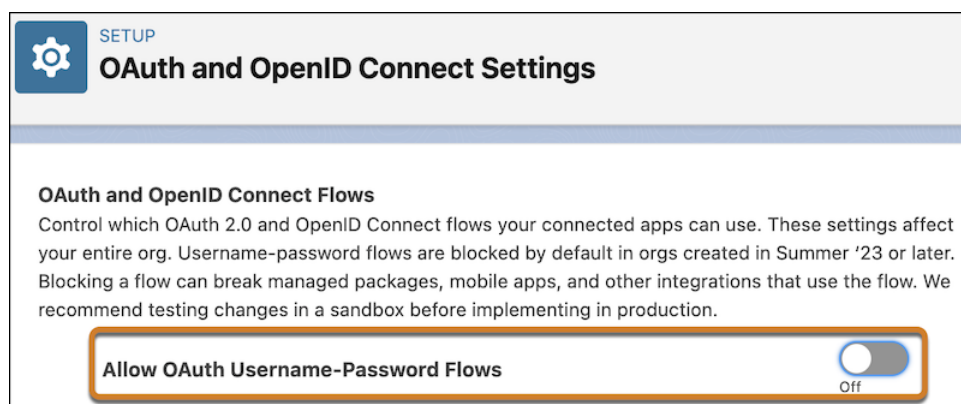
If you create your org in Summer '23 or later, the OAuth 2.0 username-password flow is blocked by default. The username-password flow presents security risks. We recommend using the OAuth 2.0 client credentials flow instead.

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

**Why:** The username-password flow is blocked by default in new orgs so that developers can't use it to build integrations. Blocking this flow is likely to break mobile applications, including those developed by Salesforce, such as the Salesforce mobile app and the Field Service mobile app. Blocking is also likely to break managed packages. You can monitor Login History to confirm if the username-password flow is being used for a connected app in Salesforce. To avoid disruptions from blocking the username-password flow, you can enable the flow.

**How:** To check if the username-password flow is being used for connected apps in Salesforce, create a Login History view and add the Login Subtype field.

To enable the username-password flow, in OAuth and OpenID Connect Settings, select **Allow OAuth Username-Password Flows**.



## Take the Reins on Your User Registration Experiences with Headless Registration

With the new Headless Registration Flow, you can fully control the user registration experiences in a third-party app while Salesforce does the heavy lifting on the backend. Your users can register, log in, and access their data all within your app. Your app calls Headless Registration API via an Experience Cloud site to create users, authenticate them, and authorize data access.

**Where:** This change applies to LWR, Aura, and Visualforce sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Unlimited, and Developer editions

**How:** Configure the Headless Registration Flow, which is built on the Authorization Code and Credentials Flow.

SEE ALSO:

[Headless Identity Implementation Guide](#)

[Headless Registration Flow for Public Clients \(can be outdated or unavailable during release preview\)](#)

[Headless Registration Flow for Private Clients \(can be outdated or unavailable during release preview\)](#)

[Configure a Connected App for the Authorization Code and Credentials Flow \(can be outdated or unavailable during release preview\)](#)

## Specify a User's Verification Method in the Body of Headless Registration Requests

When you configure the Headless Registration Flow, include the user's identity verification method in the body of your initial POST request to Headless Registration API instead of in a header. Previously, we instructed you to specify the user's verification method in an `Auth-Verification-Type` header. But Salesforce checks only the `verificationmethod` body parameter in the initial registration request, so if you include the verification method in a header, the value doesn't get passed on to Headless Registration API.

**Where:** This change applies to LWR, Aura, and Visualforce sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Unlimited, and Developer editions.

**Why:** The `verificationmethod` parameter specifies whether you want users to receive their one-time password (OTP) in an email or SMS message. The `Auth-Verification-Type` header indicates which verification method was used. You use the `Auth-Verification-Type` header in this flow, but only in the authorization request, because at that point the user has already received their email or SMS message.

**How:** In your POST request to the `/services/auth/headless/init/registration` endpoint, you can optionally include a `verificationmethod` parameter where you specify either `email` or `sms`. If you don't specify a method, it defaults to email.

If you include the `verificationmethod` parameter in your registration request, include an `Auth-Verification-Type` header in your request to the `/services/oauth2/authorize` endpoint. The value of this header must match the `verificationmethod` value.

## Improve Security for the Headless Forgot Password Flow

To enhance security, you can now add requirements for your third-party app to access Headless Forgot Password API. These requirements apply to the first step of the flow, when your app requests a password reset using a POST request. You can require your POST request to include access token issued to an internal integration user. Or you can require a reCAPTCHA token in your request.

**Where:** This change applies to LWR, Aura, and Visualforce sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Unlimited, and Developer editions.

**How:** From the Login & Registration page in your Experience Cloud site's Administration workspace, when the Headless Forgot Password Flow is enabled, you can enable **Require authentication to access this API** or **Require reCAPTCHA to access this API**. You must require either authentication or reCAPTCHA.

### SEE ALSO:

[Headless Identity Implementation Guide](#)

[Headless Forgot Password Flow for Customers and Partners \(can be outdated or unavailable during release preview\)](#)

[Configure an Experience Cloud Site to Enable the Headless Forgot Password Flow \(can be outdated or unavailable during release preview\)](#)

## Build a Native Single Sign-On Experience in a Third-Party App

With a new supported parameter for the OAuth 2.0 web server flow and OAuth 2.0 user-agent flows, you can now create native single sign-on experiences in third-party apps. For example, you can natively display a button in your app that allows users to log in with Google. When a user clicks the button, the browser is bounced briefly to Salesforce, then automatically redirected to Google to log in. After the user enters their Google credentials, the browser is again redirected briefly to Salesforce before redirecting back to your app. Both redirects to Salesforce happen automatically, so it feels like the user went straight from your app to Google and back again.

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

**How:** Set up single sign-on with an authentication provider or SAML identity provider, and add the provider to your My Domain or Experience Cloud site. Then set up the web server flow or user-agent flow. In the authorization request, include the developer name of

your provider in the `sso-provider` parameter. When Salesforce receives the request, it verifies whether there's an SSO provider with that name configured for the org or site. If there is, Salesforce initiates the SSO flow and eventually logs the user in.

SEE ALSO:

[Create a Native Single Sign-On Experience in Your App \(can be outdated or unavailable during release preview\)](#)

## Take More Control of Self-Registration for Customers and Partners

For more control over your Experience Cloud self-registration process, you can disable the standard self-registration components on Aura and Lightning Web Runtime (LWR) sites.

**Where:** This change applies to LWR, Aura, and Visualforce sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

SEE ALSO:

[Get More Control over Self-Registration](#)

## Enhance Your Authorization Flow Efficiency with JSON Web Token (JWT)-Based Access Tokens (Beta)

To improve the overall performance of your authorization flows and third-party apps, you can now enable connected apps to issue JSON Web Token (JWT)-based access tokens instead of opaque OAuth access tokens. Unlike opaque access tokens, JWT-based access tokens have a format that your app can understand. This transparent format gives you the ability to locally parse and validate tokens on your app instead of calling a Salesforce endpoint. Currently, you can't use this token to access any Salesforce APIs, but you can use it to simplify validation for your own services.

**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:** If you're a connected app developer, enable JWT-based access tokens in your connected app OAuth settings. You must then enable this feature in your connected app policies. Both settings are required to opt in. If you installed the connected app as part of a managed package, this feature is available only if the connected app developer enabled it. If so, you must explicitly opt in from your connected app policies to avoid service disruptions.

## API Only Users Are Restricted from Accessing the User Interface via `frontdoor.jsp`

For sessions that are bridged from a custom web interface using `frontdoor.jsp`, users with the API Only User permission can access the Salesforce user interface (UI) only to change and reset their passwords. They can't access any other UIs.

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

**How:** If you have users with the API Only User permission who are bridging sessions into Salesforce via `frontdoor.jsp`, their UI access can be impacted by this change. To give these users full access to the UI, remove the API Only User permission. Or you can switch to a user who doesn't have this permission.

## Authorize Apps to Access All Data Cloud Resources

To give authorized access to all Data Cloud APIs, you can assign a connected app the new `cdp_api` OAuth scope.

**Where:** This change applies to Lightning Experience.

SEE ALSO:

[Authorize Apps to Access Data Cloud Resources](#)

## Upgrade to Identity Connect 7.1.5

To get the latest security enhancements, upgrade from your current version of Identity Connect to Identity Connect 7.1.5. Identity Connect 7.1.5 adds to the extensive security improvements introduced in Identity Connect 7.1.1. If you're using Identity Connect 2.1 or Identity Connect 3.0.X.X, you must upgrade to Identity Connect 7.1.5 as soon as possible. As of Winter '22, you can no longer download Identity Connect 2.1 and Identity Connect 3.0.X.X.

**Where:** This change applies to Lightning Experience and Salesforce Classic and is available for an additional cost in Enterprise, Performance, and Unlimited editions. Developer edition includes 10 Identity Connect permission set licenses.

**How:** To install Identity Connect 7.1.5, use the download link on the Identity Connect setup page. Before you upgrade from Identity Connect 2.1 or 3.0.X.X, make sure that you have the latest version of the Identity Connect managed package installed.

## Identity Connect 3.0.1.2 Security Patch Is Being Removed

Because Identity Connect 3.0.1.2 isn't supported, the Identity Connect 3.0.1.2 Security Patch is no longer available as of Winter '24. The Implementation Guides for Identity Connect versions 3.0.1.2 and 2.1.0 will be removed at the same time.

**Where:** This change applies to Lightning Experience and Salesforce Classic and is available for an additional cost in Enterprise, Performance, and Unlimited editions. Developer edition includes 10 Identity Connect permission set licenses.

**When:** This change takes effect in Winter '24.

## Verify User Email Addresses

To protect your org and user data, ensure that your users have a verified email address. You can now manage email verification with simple UI tools instead of code. While viewing a user's details, you can see whether their email address is verified and initiate verification with a few clicks. Your users can also see their email address status and begin verification for themselves. To finish verifying, they click a link received at their unverified email address.

**How:** From the Users Setup page, select a user and find the Email field. To initiate email verification, select **Verify**. After the user clicks the verification link emailed to them, their email address is marked Verified. The verification link expires after 72 hours. If a user misses this window, click **Verify** again to send a new link. You can also verify user email addresses using the API method.

SEE ALSO:

[Salesforce Help: Verify Email Addresses with Async Email \(can be outdated or unavailable during release preview\)](#)

## Update U2F Security Keys to Support WebAuthn Authentication

To work with Salesforce, U2F security keys must be updated to use WebAuthn authentication. The update process works seamlessly behind the scenes. For new security keys, the update occurs automatically when a user registers it for their Salesforce account. For U2F security keys that were registered prior to Summer '22, users simply need to log in with their key before the Winter '24 release. Doing so automatically updates the key. If a user misses this window, they can still update their key after Winter '24 by re-registering it for their Salesforce account.

**How:** If any of your users miss the window to update their U2F key before Winter '24, use these access recovery tips. In both cases, the process of re-registering a U2F key completes the WebAuthn update.

- Instruct the user to disconnect and re-register their key from the Advanced User Details page. If the user hasn't registered an additional verification method that they can use to log in, give them a temporary verification code for access to their account.
- Alternatively, remove the security key from the user's account. Then the user can log in and re-register their key. If the user doesn't have another verification method, Salesforce automatically prompts them to add one before they can finish logging in. If they log in with a different verification method or a temporary verification code, they can re-register their key from the Advanced User Details page.

SEE ALSO:

[Salesforce Help: Remove a User's Security Key Registration \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Register a U2F or WebAuthn Security Key for Identity Verification \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Generate a Temporary Identity Verification Code \(can be outdated or unavailable during release preview\)](#)

## Set Your Users' Session Timeout to 90 Minutes

For more flexibility, you can now set the session timeout value in Session Settings to 90 minutes.

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

## See When an Access Token Response Contains a JSON Web Token (JWT)-Based Access Token (Beta)

To differentiate JWT-based access tokens from opaque access tokens, the token response from a JWT-enabled connected app now contains a parameter to specify the token format.

**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:** If you enabled a connected app to use JWT-based access tokens, your access token response contains a `token_format` parameter with the value `jwt` or `opaque`, depending on the token returned.

## Use the OAuth Client Credentials Flow in More Editions

For more flexibility with the OAuth 2.0 client credentials flow, the flow execution user specified in your connected app is no longer required to have the API Only User permission. Now that we removed this requirement, you can set up this flow in all editions. Previously, because this user permission was available only in Enterprise Edition, it wasn't possible to configure a connected app for the client credentials flow in any other editions.

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

**How:** When you set up a connected app for the client credentials flow, specify an execution user in the Run As field. For Enterprise Edition orgs, we still recommend specifying an execution user who has the API Only User permission, even though it's not required.

SEE ALSO:

[Configure a Connected App for the OAuth 2.0 Client Credentials Flow](#)

[OAuth 2.0 Client Credentials Flow for Server-to-Server Integration](#)

## Hover Text Label for Client Credentials Flow Execution User Is Changed

To fix an inaccurate statement, we changed the hover text for the OAuth 2.0 client credentials execution user on the Manage Connected Apps page. Previously, the hover text stated that the execution user, also known as the Run As user, must have the API Only User permission. Because we removed this requirement in Summer '23, we removed the statement from the hover text.

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

**When:** This change is available in all supported languages except Japanese starting in Summer '23. This change is available to all customers starting in Winter '24.

SEE ALSO:

[Use the OAuth Client Credentials Flow in More Editions](#)

## Privacy Center

Host preference forms via your own Salesforce instance—there's no need for an Experience Cloud site or external site. Use Field Audit Trail to track changes to consent management objects. And learn more about Preference Manager with the new Trailhead badges.

IN THIS SECTION:

[Host Preference Forms without a Website](#)

Use a static web page to host preference forms online without creating a website to host your forms. With this method, your users don't authenticate to access your form.

[Track Consent Objects with Field Audit Trail](#)

Stay compliant with data privacy laws like the General Data Protection Regulation (GDPR), and maintain a record of your users' consent changes in Field Audit Trail.

[Earn Badges for Preference Manager](#)

Learn how to create preference forms with Preference Manager and earn Trailhead badges as you go. Check out the Preference Manager: Quick Look module and the Create a No-Code Preference Form project.

## Host Preference Forms without a Website

Use a static web page to host preference forms online without creating a website to host your forms. With this method, your users don't authenticate to access your 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:** Publish your form and add the server URL to the allowed domains list as usual. Create a token for your user, then append the token to the URL `https://{mydomain}/prefmanager/form.jsp?prefManagerName={APIName}&pctoken={token}`. Then send the URL to your user so that they can fill out and submit the preference form.

SEE ALSO:

[Salesforce Help: Host Preference Forms on a Static Web Page \(can be outdated or unavailable during release preview\)](#)



## Track Consent Objects with Field Audit Trail

Stay compliant with data privacy laws like the General Data Protection Regulation (GDPR), and maintain a record of your users' consent changes in Field Audit Trail.

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

**Who:** This change is available to customers who purchased Privacy Center and either Field Audit Trail or Salesforce Shield add-on subscriptions.

**How:** Track and retain changes made to these consent management objects.

- Authorization Form Consent
- Communication Subscription Consent
- Contact Point Consent
- Contact Point Type Consent
- Party Consent

SEE ALSO:

[Track and Audit Consent Management Data](#)

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

## Earn Badges for Preference Manager

Learn how to create preference forms with Preference Manager and earn Trailhead badges as you go. Check out the Preference Manager: Quick Look module and the Create a No-Code Preference Form project.

## Salesforce Shield

Extend your security and monitoring reach with more Shield functionality. View consolidated information about your encryption policies in Security Center. Real-time event and event log file coverage expands to track more file activity, URL redirect sources, and OAuth flows. And the period for opting into or out of generating event log files is enforced.

IN THIS SECTION:

[Event Monitoring](#)

Track OAuth flows and more file actions with Real-Time Event Monitoring. Use the Hostname Redirect event log file type to understand and update references to My Domain URLs. And the event log file generation opt-in period is enforced.

[Field Audit Trail](#)

Retain field history for a range of consent management objects.

[Shield Platform Encryption](#)

Use Security Center to visualize and track encryption policies across your tenants. Encrypt the Name field on a range of Health Cloud objects. And Platform Encryption pages are more compatible with screen readers and keyboard navigation.

## Event Monitoring

Track OAuth flows and more file actions with Real-Time Event Monitoring. Use the Hostname Redirect event log file type to understand and update references to My Domain URLs. And the event log file generation opt-in period is enforced.

## IN THIS SECTION:

[Track File Usage in Near Real-Time with FileEvent \(Generally Available\)](#)

Files are a treasure trove of sensitive and important information. Use FileEvent and FileEventStore, now generally available, to track file previews, uploads, and downloads from the UI and API. And because file events support transaction security policies, you can take steps to proactively control how users interact with specific files.

[Opt in for Event Log File Generation \(Release Update\)](#)

With this update, event log files are generated and delivered only to orgs that opt in to receive event log files. Previously, all orgs received event log files automatically. This update automatically disables event log file generation for Developer and Trial editions and for orgs 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 was first available in Spring '23 and is enforced in Summer '23.

[Dig into Details About Page Load Times](#)

Hone your app's efficiency and performance by tracking your Lightning page performance. Use new EPT deviation fields on the Lightning URI Event and Lightning URI Event Stream real-time events to see if your page load times have changed and why. And when page load times take more than 60 seconds, the EffectivePageTime field value no longer is set to 0 on real-time events or the Lightning Page View event type.

[Track the Source of My Domain Redirections](#)

To help you update references to your previous My Domain URLs, the Hostname Redirects event type includes more information on where requests to those URLs come from. Use the new Origin and Referrer fields to identify references to your previous URLs. If your URLs changed with enhanced domains, use this information to update those references before some redirections stop in Winter '25.

[Track Insecure Login Flows](#)

With Real-Time Event Monitoring, you can now monitor for insecure flows that can expose user credentials to security risks. Use LoginEvent and LoginEventStream to track OAuth user-agent and username-password flows.

[View Knowledge Article Event Data in Event Monitoring Analytics Apps](#)

You can now use the Event Monitoring Analytics app to visualize event data about knowledge article usage. Build or enhance dashboards that show key information such as who's viewing knowledge articles, which article version they open, and when they view it. Use the new USER\_ID\_DERIVED field on the Knowledge Article View event type to better understand specific users' interactions with your knowledge content.

[Streamline Dataset Updates for the Event Monitoring Analytics App \(Beta\)](#)

Say goodbye to recreating Event Monitoring Analytics apps with each new release. You can now upgrade and reconfigure Event Monitoring Analytics apps configured to add only new event log file data to existing datasets. Save time and reduce the likelihood of reaching row count limits.

[Track API Usage for All API Versions](#)

Use the API Total Usage event type to monitor details of requests made from all versions of the Platform SOAP API, Platform REST API, and Bulk API. Previously, this event type monitored usage through API version 49.0.

## Track File Usage in Near Real-Time with FileEvent (Generally Available)

Files are a treasure trove of sensitive and important information. Use FileEvent and FileEventStore, now generally available, to track file previews, uploads, and downloads from the UI and API. And because file events support transaction security policies, you can take steps to proactively control how users interact with specific files.

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

**Who:** This change is available to customers who purchased Salesforce Shield or Salesforce Event Monitoring add-on subscriptions.

SEE ALSO:

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

[Platform Events Developer Guide: FileEvent](#) (can be outdated or unavailable during release preview)

[Platform Events Developer Guide: FileEventStore](#) (can be outdated or unavailable during release preview)

## Opt in for Event Log File Generation (Release Update)

With this update, event log files are generated and delivered only to orgs that opt in to receive event log files. Previously, all orgs received event log files automatically. This update automatically disables event log file generation for Developer and Trial editions and for orgs 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 was first available in Spring '23 and is enforced in Summer '23.

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

**When:** This update was first available in Spring '23 and is enforced in Summer '23. To get the major release upgrade date for your instance, go to [Trust Status](#), search for your instance, and click the maintenance tab.

**How:** To review this update, from Setup, in the Quick Find box, enter *Event Monitoring*, and then select **Event Monitoring Settings**. Turn on or off **Generate event log** files.

SEE ALSO:

[Release Updates](#)

## Dig into Details About Page Load Times

Hone your app's efficiency and performance by tracking your Lightning page performance. Use new EPT deviation fields on the Lightning URI Event and Lightning URI Event Stream real-time events to see if your page load times have changed and why. And when page load times take more than 60 seconds, the EffectivePageTime field value no longer is set to 0 on real-time events or the Lightning Page View event type.

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

**Who:** This change is available to customers who purchased Salesforce Shield or Salesforce Event Monitoring add-on subscriptions.

**How:** Use four new fields to see what caused changes in your Lightning page performance.

- **EffectivePageTimeDeviationErrorType:** Indicates the origin of an error.
- **EffectivePageTimeDeviationReason:** The reason for deviation in page loading time.
- **HasEffectivePageTimeDeviation:** If a deviation in page load time occurred.
- **UserAgent:** The type of client used to make the request. For example, the browser, application, or API.

SEE ALSO:

[Platform Events Developer Guide: LightningURIEvent](#)

[Platform Events Developer Guide: LightningURIEventStream](#)

[Salesforce Object Reference: Lightning Page View Event Type](#)

## Track the Source of My Domain Redirections

To help you update references to your previous My Domain URLs, the Hostname Redirects event type includes more information on where requests to those URLs come from. Use the new Origin and Referrer fields to identify references to your previous URLs. If your URLs changed with enhanced domains, use this information to update those references before some redirections stop in Winter '25.

**Where:** This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions. The Hostname Redirects event is available in the API but not in the Event Monitoring Analytics app. This event is free for all customers with a 24-hour data retention period.

SEE ALSO:

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

[Salesforce Help: Log Redirections for My Domain Hostnames \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Prepare for the End of Redirections for Non-Enhanced Domains \(can be outdated or unavailable during release preview\)](#)

## Track Insecure Login Flows

With Real-Time Event Monitoring, you can now monitor for insecure flows that can expose user credentials to security risks. Use LoginEvent and LoginEventStream to track OAuth user-agent and username-password flows.

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

**Who:** This change is available to customers who purchased Salesforce Shield or Salesforce Event Monitoring add-on subscriptions.

SEE ALSO:

[Track Insecure Login Flows Through Real-Time Event Monitoring](#)

## View Knowledge Article Event Data in Event Monitoring Analytics Apps

You can now use the Event Monitoring Analytics app to visualize event data about knowledge article usage. Build or enhance dashboards that show key information such as who's viewing knowledge articles, which article version they open, and when they view it. Use the new USER\_ID\_DERIVED field on the Knowledge Article View event type to better understand specific users' interactions with your knowledge content.

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

**Who:** This change is available to customers who purchased Salesforce Shield or Salesforce Event Monitoring add-on subscriptions.

## Streamline Dataset Updates for the Event Monitoring Analytics App (Beta)

Say goodbye to recreating Event Monitoring Analytics apps with each new release. You can now upgrade and reconfigure Event Monitoring Analytics apps configured to add only new event log file data to existing datasets. Save time and reduce the likelihood of reaching row count limits.

**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.

SEE ALSO:

[Salesforce Help: Create and Share the Event Monitoring Analytics App \(can be outdated or unavailable during release preview\)](#)

## Track API Usage for All API Versions

Use the API Total Usage event type to monitor details of requests made from all versions of the Platform SOAP API, Platform REST API, and Bulk API. Previously, this event type monitored usage through API version 49.0.

**Where:** This change applies to Enterprise, Performance, Unlimited, and Developer editions. This event type is available in the API but not in the Event Monitoring Analytics app.

**Who:** The API Total Usage event type is free with 24-hour data retention for all customers. Customers who purchased Salesforce Shield or Salesforce Event Monitoring add-on subscriptions enjoy a longer data retention period.

SEE ALSO:

[Salesforce Object Reference: API Total Usage](#)

## Field Audit Trail

Retain field history for a range of consent management objects.

IN THIS SECTION:

[Track and Audit Consent Management Data](#)

Capture and tracking customer consent preferences to support your data privacy and compliance strategy. With Field Audit Trail, you can retain and audit changes to customer consent preferences across five consent management objects: Authorization Form Consent, Communication Subscription Consent, Contact Point Consent, Contact Point Type Consent, and Party Consent.

## Track and Audit Consent Management Data

Capture and tracking customer consent preferences to support your data privacy and compliance strategy. With Field Audit Trail, you can retain and audit changes to customer consent preferences across five consent management objects: Authorization Form Consent, Communication Subscription Consent, Contact Point Consent, Contact Point Type Consent, and Party Consent.

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

**Who:** This change is available to customers who purchased Privacy Center and either Field Audit Trail or Salesforce Shield add-on subscriptions.

**How:** To retain fields that have field history tracking enabled, add consent management data to your retention policy with Metadata API. Then use REST API, SOAP API, and Tooling API to work with your archived data.

SEE ALSO:

[Track Consent Objects with Field Audit Trail](#)

## Shield Platform Encryption

Use Security Center to visualize and track encryption policies across your tenants. Encrypt the Name field on a range of Health Cloud objects. And Platform Encryption pages are more compatible with screen readers and keyboard navigation.

### IN THIS SECTION:

#### [Track Platform Encryption Data from Security Center](#)

Simplify encryption policy management by tracking the status of encryption policy settings from Security Center, including when they were last updated.

#### [Encrypt More Patient Health Data](#)

Protected health information (PHI) can be inadvertently entered in the Name field of certain Health Cloud objects. These fields don't expose information directly, but can include patient information in the naming scheme. Shield Platform Encryption supports encryption at-rest for the Name field on a range of Health Cloud objects.

#### [Access More Shield Platform Encryption Features with Assistive Technology](#)

Key Management and Advanced Settings pages in Setup are now more compatible with screen readers and keyboard navigation. Repositioned buttons ensure that keyboard users can complete key management steps in a logical order. And keyboard navigation is easier in tables when distinguishing between read-only and interactive elements. Toggles, checkboxes, tooltips, and other elements now have clearer, more informative labels that respect the default page language that screen readers use. And improved contrast across Shield Platform Encryption pages makes buttons and other elements easier for all users to see.

## Track Platform Encryption Data from Security Center

Simplify encryption policy management by tracking the status of encryption policy settings from Security Center, including when they were last updated.

**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 the Security Center add-on subscriptions.

**How:** Monitor the Encryption Policy metric from your Security Center dashboard via the Configuration category in Security Overview.

### SEE ALSO:

[Simplify Security Policy Management with the Encryption Policies Metric](#)

[Salesforce Help: How Shield Platform Encryption Works \(can be outdated or unavailable during release preview\)](#)

## Encrypt More Patient Health Data

Protected health information (PHI) can be inadvertently entered in the Name field of certain Health Cloud objects. These fields don't expose information directly, but can include patient information in the naming scheme. Shield Platform Encryption supports encryption at-rest for the Name field on a range of Health Cloud objects.

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

**Who:** This change is available to customers who purchased Salesforce Shield or Shield Platform Encryption and the add-on subscriptions for Health Cloud or Health Cloud for Life Sciences.

**How:** On the Encryption Policy page, click **Encrypt Fields**. Then click **Edit**, and select the fields that you want to encrypt. You can encrypt the Name field on these objects with the probabilistic, case-sensitive deterministic, or case-insensitive deterministic encryption schemes.

- CarePlanTemplateProblem
- CareProgramEnrollee

- CareProgramEnrolleeProduct
- CareProgramProvider
- CareSpecialty
- CoverageBenefit
- HealthcareProviderSpecialty
- MemberPlan
- PurchaserPlan

SEE ALSO:

[Salesforce Help: Which Standard Fields Can I Encrypt? \(can be outdated or unavailable during release preview\)](#)

## Access More Shield Platform Encryption Features with Assistive Technology

Key Management and Advanced Settings pages in Setup are now more compatible with screen readers and keyboard navigation. Repositioned buttons ensure that keyboard users can complete key management steps in a logical order. And keyboard navigation is easier in tables when distinguishing between read-only and interactive elements. Toggles, checkboxes, tooltips, and other elements now have clearer, more informative labels that respect the default page language that screen readers use. And improved contrast across Shield Platform Encryption pages makes buttons and other elements easier for all users to see.

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

**Who:** This change applies to users with either Shield Platform Encryption or Shield add-on subscriptions.

## Security Center

Automate processes for Security Center data with flows. Deploy mobile app Security policies with a new Security policy type. Track changes to encryption policies and track the login count for external users with new Security Center metrics. Run Security Center features on Government Cloud orgs.

IN THIS SECTION:

[Automate Processes for Security Center Data with Flows](#)

Increase efficiency for your processes by creating record-triggered flows based on Security Center objects.

[Simplify Encryption Policy Management with the Encryption Policies Metric](#)

Now you can track the status of encryption policy settings in Security Center, including when they were last updated.

[Assure Tenant Security by Tracking External Logins](#)

Track the login count for external users to ensure that everyone with access to a tenant is logging in appropriately.

[Security Center Is Now Compatible with Government Cloud \(Generally Available\)](#)

Security Center features are now available when running a Government Cloud or Government Cloud Plus org.

[Deploy Mobile App Security Policies with the New Mobile App Security Policy Type](#)

With Security Center's new Mobile App Security Policy, you can define and deploy Mobile App Security Policies to selected tenants.

## Automate Processes for Security Center Data with Flows

Increase efficiency for your processes by creating record-triggered flows based on Security Center objects.

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

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

**How:** From Setup, in the Quick Find box, enter *Flow*, and then select Flows. Click **New Flow**, then click **Record-Triggered Flow**, and click **Create**. You can then select the Security Center objects.

SEE ALSO:

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

## Simplify Encryption Policy Management with the Encryption Policies Metric

Now you can track the status of encryption policy settings in Security Center, including when they were last updated.

**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 the Shield Platform Encryption and the Security Center add-on subscriptions.

**How:** Monitor the Encryption Policy metric from your Security Center dashboard via the Configuration category in Security Overview.



SEE ALSO:

[Simplify Security Policy Management with the Encryption Policies Metric](#)

[Salesforce Help: How Shield Platform Encryption Works \(can be outdated or unavailable during release preview\)](#)

## Assure Tenant Security by Tracking External Logins

Track the login count for external users to ensure that everyone with access to a tenant is logging in appropriately.

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

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

**How:** Monitor the External and MFA & External metrics from your Security Center dashboard via the Authentication category in Security Overview.

## Security Center Is Now Compatible with Government Cloud (Generally Available)

Security Center features are now available when running a Government Cloud or Government Cloud Plus org.

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



**Who:** This change is available to Government Cloud users with the Security Center add-on subscription.

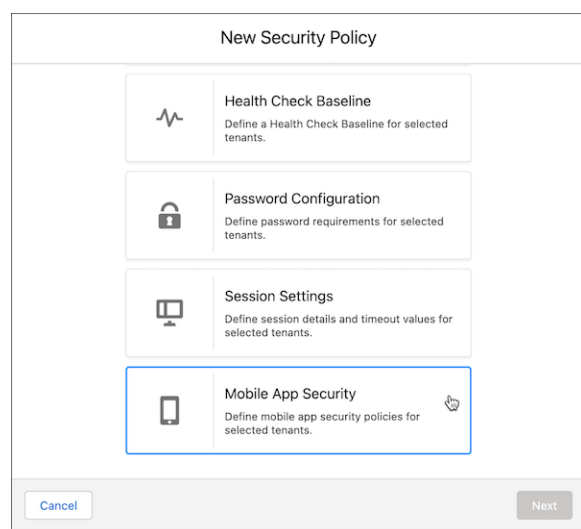
## Deploy Mobile App Security Policies with the New Mobile App Security Policy Type

With Security Center's new Mobile App Security Policy, you can define and deploy Mobile App Security Policies to selected tenants.

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

**Who:** This policy is available to Mobile Application Security users with the Security Center add-on subscription.

**How:** To access Security Center policies from your Security Center dashboard, click the **Security Policies** tab, and then click **New Security Policy**.



SEE ALSO:

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

## 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:

[Get Improved Unique Field Masking \(Release Update\)](#)

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. This update was first available in Spring '23.

[Process Data Mask Jobs Faster \(Release Update\)](#)

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. This update was first available in Spring '23.

## Get Improved Unique Field Masking (Release Update)

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. This update was first available in Spring '23.

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

## Process Data Mask Jobs Faster (Release Update)

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. This update was first available in Spring '23.

**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.

## Other Security Changes

Content sniffing protection is enforced. Assign external credentials with permission set groups and profiles. To calibrate access, link OAuth scopes to principals in external credentials and select from more HTTP referrer policy options. And you can create and manage named credentials with Connect API.

### 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.

#### [Map External Credential Principals to Permission Sets and Profiles](#)

Assign external credential principals to users using permission set groups and profiles so that they can make callouts to remote systems with appropriate access. Previously, you had to assign users directly to a specific permission set or profile. Now you can assign permissions via permission set groups as well.

#### [Fine-Tune Access by Linking OAuth Scopes to Principals](#)

Link OAuth scopes to principals in external credentials for more granular access control. For example, users with permission set A can request one scope from an authentication provider, and a different group of users with permission set B can use a different scope. You can also add formulas and variables to extend a scope's granularity. For instance, use merge fields or a formula, or both, to specify a role when requesting tokens from an authentication provider.

#### [Create Named Credentials with the Expanded Connect API](#)

Use Connect API to create and manage named and external credentials from within applications, including applications written in Apex. You no longer have to interrupt a setup to create credentials through the UI. And, in those cases where you don't know the endpoint, so you can't use the UI, you can now create credentials with Connect API.

### Customize When to Share Sensitive Information in Your URLs

When you click a link, the website that you visit can see the URL of the Salesforce page where the link lives. That URL can contain identifying information, such as your org ID or an account number. To protect that identifying information, now you can select an HTTP Referrer Policy that meets your requirements. An HTTP Referrer Policy controls how much of that URL is shared during requests. Previously, when you enabled this feature, the policy was always origin-when-cross-origin, which removes the URL path when the target website is on a different domain or a downgraded protocol.

## 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:** In Spring '23, this release update was newly available on the Release Updates Setup page in some orgs. 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. Focus on external links that you added, such as hyperlinks and embedded content on custom Visualforce pages.

SEE ALSO:


[Release Updates](#)

## Map External Credential Principals to Permission Sets and Profiles

Assign external credential principals to users using permission set groups and profiles so that they can make callouts to remote systems with appropriate access. Previously, you had to assign users directly to a specific permission set or profile. Now you can assign permissions via permission set groups as well.

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

**How:** Create principals and assign identity types to them from external credentials.


SETUP > NAMED CREDENTIALS
Edit
Delete

Label

jwt

Name

jwt

Authentication Protocol

OAuth 2.0

Authentication Flow Type

JWT Bearer Flow

Identity Provider Url

https://login.salesforce.com

Signing Certificate

cert

JWT Expiration (Seconds) ⓘ

120

**Related Named Credentials**

Label	Name	URL
jwt_nc	jwt_nc	https://www.example.com

**Principals**
New

S..	Parameter Name	Identity Type	S	Authe...	Actions
1	jwt_ioABBG01673298532648	Per User Principal		Configured	⌵
2	jwt_jcXoVHi1673299162246	Named Principal		Configured	⌵

**JWT Claims**
Edit

N.	Description	Type	Value
exp	Expiration Time	JWT Body Claim	{!Text(FLOOR((NOW()) - DATETIMEVALUE( "1970-01-01 00:00:00...

## Fine-Tune Access by Linking OAuth Scopes to Principals

Link OAuth scopes to principals in external credentials for more granular access control. For example, users with permission set A can request one scope from an authentication provider, and a different group of users with permission set B can use a different scope. You can also add formulas and variables to extend a scope's granularity. For instance, use merge fields or a formula, or both, to specify a role when requesting tokens from an authentication provider.

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

## Create Named Credentials with the Expanded Connect API

Use Connect API to create and manage named and external credentials from within applications, including applications written in Apex. You no longer have to interrupt a setup to create credentials through the UI. And, in those cases where you don't know the endpoint, so you can't use the UI, you can now create credentials with Connect API.

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

## Customize When to Share Sensitive Information in Your URLs

When you click a link, the website that you visit can see the URL of the Salesforce page where the link lives. That URL can contain identifying information, such as your org ID or an account number. To protect that identifying information, now you can select an HTTP Referrer Policy that meets your requirements. An HTTP Referrer Policy controls how much of that URL is shared during requests. Previously, when you enabled this feature, the policy was always origin-when-cross-origin, which removes the URL path when the target website is on a different domain or a downgraded protocol.

**Where:** This change applies to Lightning Experience and Salesforce Classic in Personal, Contact Manager, Group, Professional, Enterprise, Performance, Unlimited, Developer, and Database.com editions.

**How:** On the Session Settings Setup page, select **Include Referrer-Policy HTTP header**, then select an HTTP Referrer Policy. Previously, this setting was called Hide this site's URL from other web sites (including Visualforce pages).

SEE ALSO:

[Salesforce Help: Protect Sensitive Information in Your URLs \(can be outdated or unavailable during release preview\)](#)

[MDN Docs HTTP Guide: Referrer-Policy](#)

## Service

---

Transform conversation data into service insights and build bot intents with Einstein Conversation Mining (beta). Update replies with on-demand template creation in Reply Recommendations. Add prebuilt functionality to multiple bots with Bot Blocks (beta). Give your customers and partners advanced self-service automation with the Service Catalog. Record and send voice messages in enhanced Messaging channels. Add business hours to Messaging for In-App and Web. Use flows to link leads, contacts, employees and person accounts to interactions in all channels with Individual-Object linking. Create broadcast Slack messages with custom templates for Customer Service Incident Management. Get survey responses from unauthenticated guest users via APIs in Feedback Management.

IN THIS SECTION:

[Einstein for Service](#)

Transform conversation data into service insights and build bot intents with Einstein Conversation Mining (beta). Update replies with on-demand template creation. Use Bot Blocks (beta) to add a custom or Salesforce-provided dialog groups to multiple bots. Expanded support for messaging components gives you more ways to add structured content to your enhanced bot. Get reply recommendations in enhanced messaging channels. Use email conversations or select related transcripts to build conversation mining reports.

[Service Catalog](#)

Service Catalog helps you turn requests for your company's products and services into approved and documented orders through self-service automation.

[Service Cloud Channels](#)

Take advantage of new features in Messaging and Service Cloud Voice, and explore new tools available in multiple Service Cloud channels.

### 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 reduce swivel chair pains. Collaborate in Salesforce with the look, feel, and fun of Slack. Apply the power of swarming and cross-functional experts in Field Service. And start swarming faster with other enhancements.

### Customer Service Incident Management

Communicate with internal stakeholders more effectively with enhanced broadcast alerts and broadcast Slack messages. Keep your incidents centralized and easily accessible to incident teams with the new Incident Alerts All tab. And with custom templates for broadcast Slack messages, your teams can remain efficient while delivering proactive incident updates that are tailored to your business.

### Routing

Join the ongoing Omni-Channel pilot programs. The Omni Supervisor wallboard (pilot) shows more metrics and supervisors can focus on metrics for a queue.

### Knowledge

Author articles easily and more effectively and optimize agent interaction with knowledge articles by controlling content visibility, create a more granular publishing schedule for knowledge articles, simplify your knowledge article maintenance and review process, grow your knowledge base with confidence, and expose Knowledge records in the Lightning Web Runtime.

### Cases

In Email-to-Case, get an updated and feature-rich HTML text editor when you switch to the Lightning editor (beta) in the docked and case feed email composers. Make your agents more productive with a flow template that finds and links contacts to your cases.

### Feedback Management

Get responses from guest users who can take surveys without authentication. Get custom notifications and alerts for survey responses. View detailed delivery status for survey emails that are sent to a list of recipients.

### Self-Service

Self-Service provides an online support channel for your customers, allowing them to resolve their inquiries without contacting a customer service representative.

## Einstein for Service

Transform conversation data into service insights and build bot intents with Einstein Conversation Mining (beta). Update replies with on-demand template creation. Use Bot Blocks (beta) to add a custom or Salesforce-provided dialog groups to multiple bots. Expanded support for messaging components gives you more ways to add structured content to your enhanced bot. Get reply recommendations in enhanced messaging channels. Use email conversations or select related transcripts to build conversation mining reports.

### IN THIS SECTION:

#### Einstein Bots

Use Bot Blocks (beta) to add a dialog group to multiple bots, including prebuilt blocks from the Einstein Bot Library. Now it's easier to create an enhanced bot from scratch or a template. Plus, add structured content to an enhanced bot with expanded support for messaging components. The Bot Builder gets a new list view for dialog steps, support for direct invocation of standard actions, and more.

#### Einstein Classification

Save agents time with AI-generated case summaries.

#### Einstein Conversation Mining (beta)

Transform conversation data into service insights and build bot intents with Einstein Conversation Mining (beta). Use email conversations or related transcripts to build reports.

### [Einstein Reply Recommendations](#)

Optimize agent productivity and response quality with AI-generated replies. Update replies with on demand template creation, get reply recommendations in enhanced messaging channels, and the model that recommends replies to agents during chats is automatically retrained each month.

## Einstein Bots

Use Bot Blocks (beta) to add a dialog group to multiple bots, including prebuilt blocks from the Einstein Bot Library. Now it's easier to create an enhanced bot from scratch or a template. Plus, add structured content to an enhanced bot with expanded support for messaging components. The Bot Builder gets a new list view for dialog steps, support for direct invocation of standard actions, and more.

### IN THIS SECTION:

#### [Teach Your Bot New Languages More Easily with the Cross-Lingual Intent Model \(Beta\)](#)

Upgrade to the cross-lingual intent model to get improved bot performance and make adding new languages to your NLP bot a breeze. Previously, Einstein Bots offered only one intent model, which requires 20 utterances per language per intent to test or build the model. The cross-lingual intent model can be trained on as little as one utterance per language per intent, and you can test utterances in a new language without rebuilding the model. When you add 20 utterances to an intent, the cross-lingual intent model generates a more accurate F1 score, because it uses all utterances for testing and training. Plus, you can easily switch between the cross-lingual and original intent models, as long as you meet the minimum requirements. You can use the cross-lingual intent model with single- or multi-language bots.

#### [Build Bots Faster Using Einstein Bot Blocks \(Beta\)](#)

Bot Blocks help you use and share great bot functions without building a whole bot, saving you time and effort. With this feature, now in beta, you can add a dialog group to multiple bots. Great examples of blocks include a payment processor, a conversational experience, and an integration with a specific flow.

#### [Add New Functionality to Existing Bots with New Blocks \(Beta\)](#)

Add new actions to your existing bots in seconds with the new block additions to the Einstein Bot library. In Summer '23, new blocks include conversational experiences on both standard and enhanced bots. The new blocks are: Get User Info, Transfer to Agent, Check Case Status, Check Order Status, and Data Collection Disclosure.

#### [Reach More Customers with Multi-Language Support for System Bot Templates \(Beta\)](#)

You can launch new bots from a template with full multi-language support. When Salesforce bot templates support multiple languages, you can reach more customers using the same bot in less time. Einstein Bot supported languages are currently available for the Intro Template.

#### [Enhanced Bots](#)

It's easier to create an enhanced bot from scratch or from a template. Add structured content to your enhanced bot conversations with support for the time selector and question with dynamic options messaging components. Customize the response delay for your enhanced bot.

#### [Streamline Your Building Experience with Direct Invocation of Standard Actions](#)

Now, you can directly call standard actions inside your bot and build bots faster. Previously, to use standard actions inside of your bot, you called them using a separate flow or Apex class.

#### [Use Conditional AND/OR Statements in Rule Action Dialog Steps to Customize Your Bot](#)

Fine-tune your conversational experiences and create more complex conditionals with conditional AND/OR statements inside every Rule Action dialog step. Now when you add more than one conditional action to your dialog step, you can choose for all conditionals to be true or for any of them to be true.

### [Build Bots Faster with Dialog Component Library Updates](#)

Now it's easier to find the dialog steps you need in the Bot Builder. To filter dialog steps by name or category, use the new list view in the Dialog Component Library and the plus sign menu on the canvas. The Dialog Component Library is regrouped to find dialogs fast. Enhanced bots have a new dedicated section for messaging components, helping you add rich content to your bot.

### [Discover Developer Updates with the Einstein Bots API \(Generally Available\) and API Release Notes](#)

The Einstein Bots API is now generally available and growing by leaps and bounds. Use the Connector Framework and the open-source connector examples for Microsoft Teams, Twitter, and more to launch your own bot and connect it to any conversational platform. Plus, busy developers can now view all the updates in one place. The Einstein Bots API Release Notes page shows all version updates to the Einstein Bots REST API, SDK, and channel connector framework.

### [Monitor Bot Sessions More Accurately with Standard Report Improvements](#)

The All Bot Sessions, All and Engaged Sessions, and Sessions Ended by Dialog daily and hourly standard reports have a more accurate data source. Now session-related data is populated from the Session Metrics object (ConversationDefinitionSession). Previously, these reports used aggregation metrics from the Bot Metrics Daily object (ConvDefDialogDailyMetric) and the Bot Metrics Hourly object (ConvDefDialogHourlyMetric). With this change, the All and Engaged Sessions reports were renamed to Engaged vs. Unengaged Sessions because they now show unengaged sessions instead of total sessions. You also see small differences in the labels and columns in the All Bot Sessions and Sessions Ended reports, but the functionality is the same.

### [AnalyticsBotSession Object Was Removed](#)

The AnalyticsBotSession object was used to populate session-related data in API queries. You can no longer access AnalyticsBotSession records. Instead, use the newer Session Metrics object (ConversationDefinitionSession) to retrieve the same data. You can also use the ConversationDefinitionSessionEngagement junction object to link ConversationDefinitionSession records and LiveChatTranscript or MessagingSession records.

### [Run Flows in Bot User Context \(Release Update\)](#)

With this update enabled, a flow initiated by a bot uses the user profile and permission sets associated with the bot to determine the object permissions and field-level access of the flow. This update is available starting in Summer '23.

#### SEE ALSO:

[Einstein Release Notes](#)

## Teach Your Bot New Languages More Easily with the Cross-Lingual Intent Model (Beta)

Upgrade to the cross-lingual intent model to get improved bot performance and make adding new languages to your NLP bot a breeze. Previously, Einstein Bots offered only one intent model, which requires 20 utterances per language per intent to test or build the model. The cross-lingual intent model can be trained on as little as one utterance per language per intent, and you can test utterances in a new language without rebuilding the model. When you add 20 utterances to an intent, the cross-lingual intent model generates a more accurate F1 score, because it uses all utterances for testing and training. Plus, you can easily switch between the cross-lingual and original intent models, as long as you meet the minimum requirements. You can use the cross-lingual intent model with single- or multi-language bots.

**Where:** This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions. Setup for Einstein Bots is available only in Lightning Experience.



**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:** If it's your first time building an intent model, enable natural language processing for your bot. Add one or more utterances to at least two dialogs, and then enable intent and turn on Einstein for the dialogs.



To turn on the cross-lingual intent model, in the Settings section of the Bot Overview page, go to the Intent Enhancements setting and select **Use the Cross-Lingual Intent Model with this bot**. Then save your changes.

SEE ALSO:


[Salesforce Help: Turn on the Cross-Lingual Intent Model \(Beta\)](#)

[Salesforce Help: Use Intents to Understand Your Customers](#)


## Build Bots Faster Using Einstein Bot Blocks (Beta)

Bot Blocks help you use and share great bot functions without building a whole bot, saving you time and effort. With this feature, now in beta, you can add a dialog group to multiple bots. Great examples of blocks include a payment processor, a conversational experience, and an integration with a specific 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.

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

**How:** On the Bots Setup page, click the Bot Blocks tab. Click **New Block** to create a block. To create a block from a dialog group, click the dropdown next to the dialog group and select **Export as Block**.



**Create a block from an existing dialog group**

Create and reuse a bot block to enhance your bot. Blocks are meant to be shared, so include as much description as possible.

• Block Name

• API Name

• Primary Language

Description

**Create a Block from a Dialog Group**

**Block Details**


Your block will be exported with the dialogs shown. Dialogs referenced by the block but not included in the dialog group are exported as placeholder dialogs. When a consumer imports your block, they map placeholder dialogs to new or existing dialogs in their bot.

	Dialog Name	API Name	Description	Included in Block
1	Ask for Make, ...	Ask_for_Make_Model_Y...	Ask for details about th...	✓
2	Confirm Syste...	Confirm_System_Match	If the bot can find a mat...	✓
3	Add New Vehicle	Add_New_Vehicle	If no matches are found...	✓

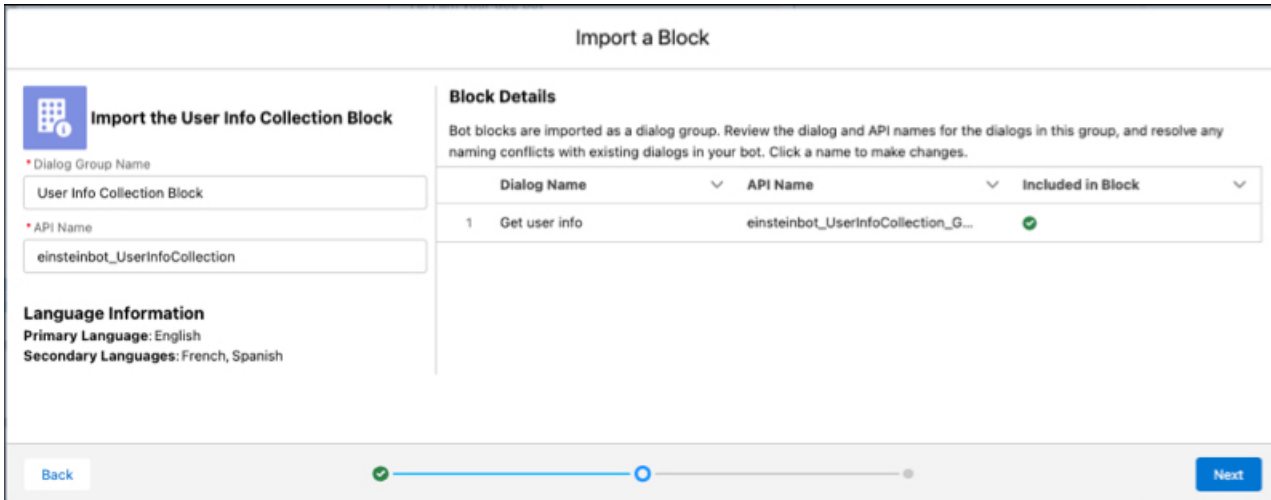
## Add New Functionality to Existing Bots with New Blocks (Beta)

Add new actions to your existing bots in seconds with the new block additions to the Einstein Bot library. In Summer '23, new blocks include conversational experiences on both standard and enhanced bots. The new blocks are: Get User Info, Transfer to Agent, Check Case Status, Check Order Status, and Data Collection Disclosure.

**Where:** This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions. Setup for Einstein Bots is available only in Lightning Experience.

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


**How:** To add a block to your bot, on the dialog menu, click the plus icon, and then select **Import a Block**.



## Reach More Customers with Multi-Language Support for System Bot Templates (Beta)

You can launch new bots from a template with full multi-language support. When Salesforce bot templates support multiple languages, you can reach more customers using the same bot in less time. Einstein Bot supported languages are currently available for the Intro Template.

**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](#).

SEE ALSO:

[Salesforce Help: Define Languages for Your Einstein Bot \(can be outdated or unavailable during release preview\)](#)

## Enhanced Bots

It's easier to create an enhanced bot from scratch or from a template. Add structured content to your enhanced bot conversations with support for the time selector and question with dynamic options messaging components. Customize the response delay for your enhanced bot.

IN THIS SECTION:

[Create an Enhanced Bot from Scratch or a Template in Fewer Steps](#)

Now it's easier to create an enhanced bot from scratch or from a template. Previously, you had to create a bot and then manually configure routing with Omni-Channel Flow and other functionality. Now you can create inbound and outbound Omni-Channel flows and specify a default outbound Omni-Channel flow as part of the guided setup. The Transfer to Agent system dialog is created for you, and the Transfer to Agent dialog and Transfer to Agent Next Step are automatically routed to the default outbound Omni-Channel flow. Plus, enhanced bots are no longer created with the Chat Key context variable, which is applicable only to standard bots on Chat channels.

### [Schedule Appointments with an Enhanced Bot](#)

Enhanced bots now support the time selector messaging component, so your customers can schedule appointments or deliveries within a bot conversation. The component presents customers with a selectable list of time slots and saves their responses.

### [Ask Questions with Dynamic Options with an Enhanced Bot](#)

Enhanced bots now support the question messaging component with dynamic options, so the bot can identify records specific to the customer and modify them or pass them along to an agent. Create a question with options that are filled dynamically from the object and fields you specify. For example, ask customers to choose from a list of their recent orders or cases. Then present options to your customer in rich messaging formats that can include custom text, images, and buttons. For a plain text experience, you can still use the Dynamic Question dialog step with enhanced and standard bots.

### [Customize Your Enhanced Bot's Response Delay](#)

Enhanced bots now support a custom response delay, which gives you more control over the pace of your conversations on Messaging for In-App and Web and third-party enhanced channels. Previously, the bot response delay was fixed at 1.2 seconds. Now you can adjust your bot's response delay between 0 and 3 seconds. Choose a shorter delay to maximize your customers' time, or choose a longer delay to give your customers more time to read.

### [End Enhanced Bot Conversations Automatically with the Improved End Chat System Dialog](#)

In enhanced bots created from scratch in Summer '23 and later, the End Chat system dialog automatically ends the conversation after thanking the customer for taking the time to chat. Previously, the End Chat dialog prompted the customer to manually end the conversation with the End Chat button. Now customers can get the great customer service they need and get on with their day in one less step.

### [Add a Bot Options Menu to Your Enhanced Bot](#)

The bot options menu is now supported for enhanced bots on Messaging for In-App and Web. Now you can add a persistent menu to your enhanced bot's chat window so your customers always know their options and can easily navigate the bot conversation. The bot options menu supports up to five dialogs as menu options.

### [Automate Sales Outreach with the Buyer Assistant Template \(Beta\)](#)

Use the new Buyer Assistant enhanced bot template, now in beta, to create bots designed to transform the web-to-lead experience and streamline sales. Plus, spin up a bot quickly from the Einstein Bots guided setup or with custom Sales onboarding.

### [Connect Enhanced Bots to WhatsApp \(Generally Available\)](#)

Use an enhanced bot with enhanced Messaging for WhatsApp channels, generally available in Messaging as of March 2023. Seamlessly route WhatsApp conversations to and from an enhanced bot with Omni-Channel Flow.

## Create an Enhanced Bot from Scratch or a Template in Fewer Steps

Now it's easier to create an enhanced bot from scratch or from a template. Previously, you had to create a bot and then manually configure routing with Omni-Channel Flow and other functionality. Now you can create inbound and outbound Omni-Channel flows and specify a default outbound Omni-Channel flow as part of the guided setup. The Transfer to Agent system dialog is created for you, and the Transfer to Agent dialog and Transfer to Agent Next Step are automatically routed to the default outbound Omni-Channel flow. Plus, enhanced bots are no longer created with the Chat Key context variable, which is applicable only to standard bots on Chat channels.

**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:** Launch the guided setup from the Einstein Bots page in Setup, and then create an enhanced bot from scratch or choose a template. When prompted, select or create a default outbound Omni-Channel flow and choose whether to create an inbound flow.

**Route with flows**

### Route bot conversations with Omni-Channel Flow

Enhanced bots use Omni-Channel Flow for routing. Select or create a default outbound Omni-Channel flow for your bot to use to transfer conversations. You can also create a simple inbound Omni-Channel flow to send conversations to your bot. When you finish creating your bot, these flows appear on the Bot Overview page.

Not ready for routing? You can skip this step and create or modify Omni-Channel flows in Flow Builder later. You can specify a default outbound Omni-Channel flow for your bot on the Bot Overview page.

[Learn more about routing for enhanced bots in Salesforce Help.](#)

☒ Create an inbound Omni-Channel flow for my bot ⓘ

Outbound Omni-Channel Flow ⓘ

Select a flow... 🔍

Back
Next

When you finish creating your bot, any flows you create appear on the Bot Overview page. You can also choose to skip this step and configure routing for your bot later.

#### SEE ALSO:

[Salesforce Help: Create an Enhanced Bot from Scratch or from a Template \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Route Conversations to and from Your Enhanced Bot \(can be outdated or unavailable during release preview\)](#)

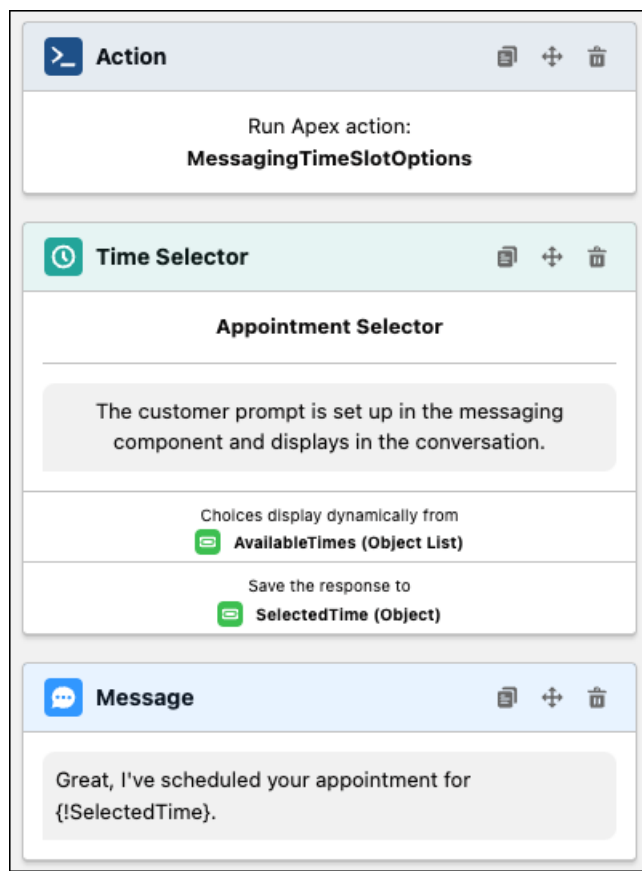
## Schedule Appointments with an Enhanced Bot

Enhanced bots now support the time selector messaging component, so your customers can schedule appointments or deliveries within a bot conversation. The component presents customers with a selectable list of time slots and saves their responses.

**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 time selector messaging components on the Messaging Components page in Setup.

To use a time selector component with an enhanced bot, in the Bot Builder, add a dialog step to reference the Apex class or flow that provides available time slots and any other input parameters. Then add the Time Selector dialog step to reference the associated time selector messaging component, and configure inputs, outputs, and error handling.



SEE ALSO:

[Salesforce Help: Schedule Appointments with an Enhanced Bot \(can be outdated or unavailable during release preview\)](#)

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

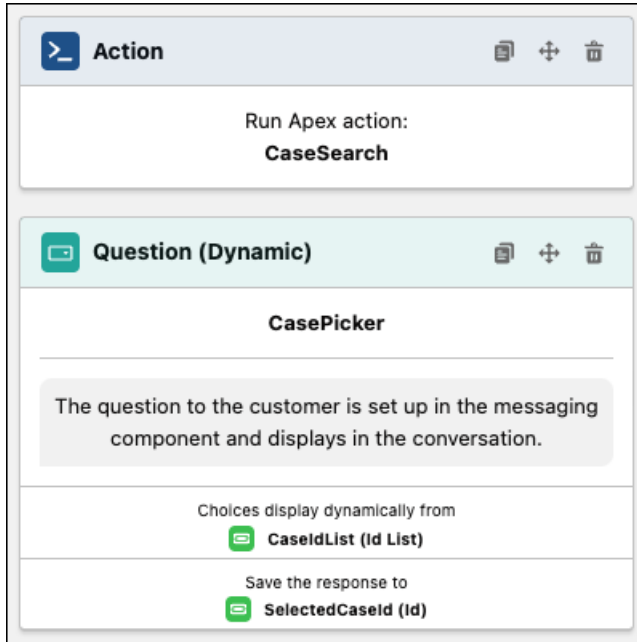
## Ask Questions with Dynamic Options with an Enhanced Bot

Enhanced bots now support the question messaging component with dynamic options, so the bot can identify records specific to the customer and modify them or pass them along to an agent. Create a question with options that are filled dynamically from the object and fields you specify. For example, ask customers to choose from a list of their recent orders or cases. Then present options to your customer in rich messaging formats that can include custom text, images, and buttons. For a plain text experience, you can still use the Dynamic Question dialog step with enhanced and standard bots.

**Where:** This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions. Setup for Einstein Bots is available only in Lightning Experience.

**How:** Create and manage question components on the Messaging Components page in Setup.

To use a question with dynamic options with an enhanced bot, in the Bot Builder, add a dialog step to reference the Apex class or flow that dynamically provides choices and any other input parameters. Then add the Question (Dynamic) dialog step to reference the associated question with dynamic components, and configure inputs, outputs, and error handling.



SEE ALSO:

[Salesforce Help: Ask a Question with Dynamic Options with an Enhanced Bot \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Create Questions with Dynamic Options \(can be outdated or unavailable during release preview\)](#)

## Customize Your Enhanced Bot's Response Delay

Enhanced bots now support a custom response delay, which gives you more control over the pace of your conversations on Messaging for In-App and Web and third-party enhanced channels. Previously, the bot response delay was fixed at 1.2 seconds. Now you can adjust your bot's response delay between 0 and 3 seconds. Choose a shorter delay to maximize your customers' time, or choose a longer delay to give your customers more time to read.

**Where:** This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions. Setup for Einstein Bots is available only in Lightning Experience.

**How:** From the Bot Overview page, in the Settings section, specify a custom bot response delay.

SEE ALSO:

[Salesforce Help: Add a Bot Response Delay \(can be outdated or unavailable during release preview\)](#)

## End Enhanced Bot Conversations Automatically with the Improved End Chat System Dialog

In enhanced bots created from scratch in Summer '23 and later, the End Chat system dialog automatically ends the conversation after thanking the customer for taking the time to chat. Previously, the End Chat dialog prompted the customer to manually end the conversation with the End Chat button. Now customers can get the great customer service they need and get on with their day in one less step.

**Where:** This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions. Setup for Einstein Bots is available only in Lightning Experience.

SEE ALSO:

[Salesforce Help: Understanding System Bot Dialogs \(can be outdated or unavailable during release preview\)](#)

## Add a Bot Options Menu to Your Enhanced Bot

The bot options menu is now supported for enhanced bots on Messaging for In-App and Web. Now you can add a persistent menu to your enhanced bot's chat window so your customers always know their options and can easily navigate the bot conversation. The bot options menu supports up to five dialogs as menu options.

**Where:** This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions. Setup for Einstein Bots is available only in Lightning Experience.

**How:** From the Dialogs page, edit the dialog you want to add to the bot options menu and select **Show in Bot Options Menu**.

SEE ALSO:

[Salesforce Help: Add a Bot Options Menu to the Chat Window \(can be outdated or unavailable during release preview\)](#)

## Automate Sales Outreach with the Buyer Assistant Template (Beta)

Use the new Buyer Assistant enhanced bot template, now in beta, to create bots designed to transform the web-to-lead experience and streamline sales. Plus, spin up a bot quickly from the Einstein Bots guided setup or with custom Sales onboarding.

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



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

**When:** Buyer Assistant is available the week of June 12, 2023.

SEE ALSO:

[Accelerate Sales Cycles with a Buyer Assistant \(Beta\)](#)

## Connect Enhanced Bots to WhatsApp (Generally Available)

Use an enhanced bot with enhanced Messaging for WhatsApp channels, generally available in Messaging as of March 2023. 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.

**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:

[Send Messaging Components in Enhanced WhatsApp Channels](#)

[Salesforce Help: Compare Messaging Channel Capabilities in Service Cloud \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Create a WhatsApp Channel in Service Cloud \(can be outdated or unavailable during release preview\)](#)

## Streamline Your Building Experience with Direct Invocation of Standard Actions

Now, you can directly call standard actions inside your bot and build bots faster. Previously, to use standard actions inside of your bot, you called them using a separate flow or Apex class.

**Where:** This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions. Setup for Einstein Bots is available only in Lightning Experience.

**How:** From the Dialog Component Library, drag the Standard Action step onto the canvas.

SEE ALSO:

[Salesforce Help: Set Up a Dialog Action Step \(can be outdated or unavailable during release preview\)](#)

## Use Conditional AND/OR Statements in Rule Action Dialog Steps to Customize Your Bot

Fine-tune your conversational experiences and create more complex conditionals with conditional AND/OR statements inside every Rule Action dialog step. Now when you add more than one conditional action to your dialog step, you can choose for all conditionals to be true or for any of them to be true.

**Where:** This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions. Setup for Einstein Bots is available only in Lightning Experience.

**How:** To add a conditional, add a Rule Dialog step to your bot dialog. Then, add two or more conditionals to your step.

The screenshot shows the 'Step Properties' dialog box. Under the 'Conditions' section, there is a 'Condition Requirements' dropdown set to 'All Conditions Are Met (AND)'. Below this, there are two conditional rows. The first row has a 'Variable Name' of 'New Customer (Boolean)' and an 'Operator' of 'Is True'. The second row has a 'Variable Name' of '[System] Last Customer Input (Text)', an 'Operator' of 'Equals', and a 'Value' of 'Running shoes'. Each row has a close button (X) in the top right corner.

SEE ALSO:

[Salesforce Help: Set Up a Dialog Rule Step \(can be outdated or unavailable during release preview\)](#)

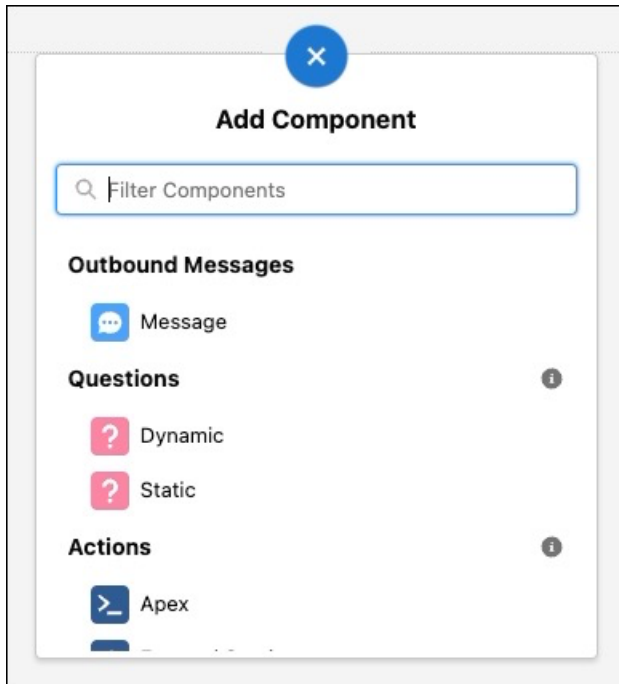
## Build Bots Faster with Dialog Component Library Updates

Now it's easier to find the dialog steps you need in the Bot Builder. To filter dialog steps by name or category, use the new list view in the Dialog Component Library and the plus sign menu on the canvas. The Dialog Component Library is regrouped to find dialogs fast. Enhanced bots have a new dedicated section for messaging components, helping you add rich content to your bot.

**Where:** This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions. Setup for Einstein Bots is available only in Lightning Experience.

**How:** To find a specific dialog step, use the filters in the Dialog Component Library or the plus sign icon in the canvas.





SEE ALSO:

[Salesforce Help: Understand Einstein Bot Dialogs \(can be outdated or unavailable during release preview\)](#)

## Discover Developer Updates with the Einstein Bots API (Generally Available) and API Release Notes

The Einstein Bots API is now generally available and growing by leaps and bounds. Use the Connector Framework and the open-source connector examples for Microsoft Teams, Twitter, and more to launch your own bot and connect it to any conversational platform. Plus, busy developers can now view all the updates in one place. The Einstein Bots API Release Notes page shows all version updates to the Einstein Bots REST API, SDK, and channel connector framework.

SEE ALSO:


[Einstein Bots API Guide: Einstein Bot API Release Notes](#)

## Monitor Bot Sessions More Accurately with Standard Report Improvements

The All Bot Sessions, All and Engaged Sessions, and Sessions Ended by Dialog daily and hourly standard reports have a more accurate data source. Now session-related data is populated from the Session Metrics object (ConversationDefinitionSession). Previously, these reports used aggregation metrics from the Bot Metrics Daily object (ConvDefDialogDailyMetric) and the Bot Metrics Hourly object (ConvDefDialogHourlyMetric). With this change, the All and Engaged Sessions reports were renamed to Engaged vs. Unengaged Sessions because they now show unengaged sessions instead of total sessions. You also see small differences in the labels and columns in the All Bot Sessions and Sessions Ended reports, but the functionality is the same.

**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 App Launcher, find Reports. Under All Folders, select the **Einstein Bot Reports Summer '23** folder, which contains the improved reports in the Session Metrics Summer '23 folder, plus fresh versions of all other reports with no changes to functionality.

 **Note:** We maintain legacy bot reports in their original folders so that we don't overwrite any of your customizations. The All Bot Sessions, All and Engaged Sessions, and Sessions Ended reports in these folders use the previous data sources, and the Engaged vs. Unengaged Session reports aren't available.

SEE ALSO:

[Salesforce Help: Navigate Einstein Bot Standard Reports \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Engaged Sessions, Bot Billing, and Bot Performance \(can be outdated or unavailable during release preview\)](#)

## AnalyticsBotSession Object Was Removed

The AnalyticsBotSession object was used to populate session-related data in API queries. You can no longer access AnalyticsBotSession records. Instead, use the newer Session Metrics object (ConversationDefinitionSession) to retrieve the same data. You can also use the ConversationDefinitionSessionEngagement junction object to link ConversationDefinitionSession records and LiveChatTranscript or MessagingSession 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.

## Run Flows in Bot User Context (Release Update)

With this update enabled, a flow initiated by a bot uses the user profile and permission sets associated with the bot to determine the object permissions and field-level access of the flow. This update is available starting in Summer '23.

**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:** Salesforce enforces this update in Summer '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:** Previously, a flow initiated in a bot ran in system context. A flow that runs in system context has permission to access and modify all data.

With this update, flows initiated by a bot run in user context. When the bot initiates a flow, the user profile and permission sets associated with the bot, as well as any sharing rules, determine the object permissions and field-level access of the flow.

This update improves security in Salesforce by preventing you from unintentionally allowing bots to create or modify records they don't have access to.

**How:** Enabling this update prevents flows that are initiated by a bot from creating, reading, updating, or deleting records that the bot doesn't have permission to access or modify.

Before you enable this update in your production org, we recommend that you test your bots that run flows with this update enabled in a sandbox or developer org. Test that the flows initiated from your bot can perform all flow operations.

If a flow fails, identify the missing permissions and add them to the user profile or permission sets associated with your bot.

SEE ALSO:

[Release Updates](#)

## Einstein Classification

Save agents time with AI-generated case summaries.

## IN THIS SECTION:

[Close Cases Faster with Work Summaries](#)

Save agents time with AI-generated case summaries. Based on a Chat conversation between an agent and customer, Einstein GPT predicts and fills a summary, issue, and resolution. Agents can then review, edit, and save these summaries.

## SEE ALSO:

[Einstein Release Notes](#)

## Close Cases Faster with Work Summaries

Save agents time with AI-generated case summaries. Based on a Chat conversation between an agent and customer, Einstein GPT predicts and fills a summary, issue, and resolution. Agents can then review, edit, and save these summaries.

**Where:** This change applies to Unlimited editions with Service Cloud Einstein and the Einstein GPT for Service add-on. Einstein GPT is available in Lightning Experience. Setup for Einstein GPT is available in Lightning Experience.

To purchase the Einstein GPT for Service add-on, contact your Salesforce Account Executive.

**How:** Work Summaries requires the Chat channel and the Service Console app.

To get started with Work Summaries, from the Einstein GPT for Service: Work Summaries Setup page, enable Work Summaries. In the Map Outputs to Record Fields section, select the fields you want to map to Einstein GPT outputs in the case.

To show agents summaries, in Object Manager, edit or create a quick action to add the mapped summary fields to the Case layout. Then in Lightning App Builder, add the Wrap Up component to the chat transcript page.

## SEE ALSO:

[Salesforce Help: Einstein GPT Work Summaries](#)[Salesforce Help: About Einstein GPT](#)

## Einstein Conversation Mining (beta)

Transform conversation data into service insights and build bot intents with Einstein Conversation Mining (beta). Use email conversations or related transcripts to build reports.

## IN THIS SECTION:

[Build Better Reports with Case Object Segmentation](#)

Select related transcripts to build a Conversation Mining report. Now you can segment based on fields on a case record or related to Live Chat Transcript such as case reason, country, and service team. Previously, you could segment a report based only on fields in the Live Chat Transcript object.

[Include Email Conversations When You Build Your Conversation Mining Reports \(Pilot\)](#)

Now you can use email conversations to build reports with Einstein Conversation Mining. These reports help you better understand and identify common cases or customer issues. Previously, Einstein Conversation Mining looked only at your live chat transcripts.

### [Get Service Insights and Build Bot Intents with Einstein Conversation Mining \(beta\)](#)

Replace time-consuming transcript analysis with Einstein Conversation Mining (beta). Transform conversation data into service insights and build bot intents.

SEE ALSO:

[Einstein Release Notes](#)

## Build Better Reports with Case Object Segmentation

Select related transcripts to build a Conversation Mining report. Now you can segment based on fields on a case record or related to Live Chat Transcript such as case reason, country, and service team. Previously, you could segment a report based only on fields in the Live Chat Transcript object.

**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.

**How:** Select **Case** as an object to segment on during the report building process, and then add record filters.

The screenshot shows the 'Create a Conversation Mining Report' wizard. In the 'Define Your Report' step, the 'Select from Available Record Types' dropdown is set to 'Case'. A note indicates 'Chat Transcripts linked to Case Records'. Below this, there are input fields for 'Field', 'Operator', 'Type', and 'Value' to define a filter. A 'Back' button is at the bottom left, and a 'Build Report' button is at the bottom right. A progress bar at the bottom shows four steps, with the first three completed.


SEE ALSO:

[Salesforce Help: Build an Einstein Conversation Mining Report](#)

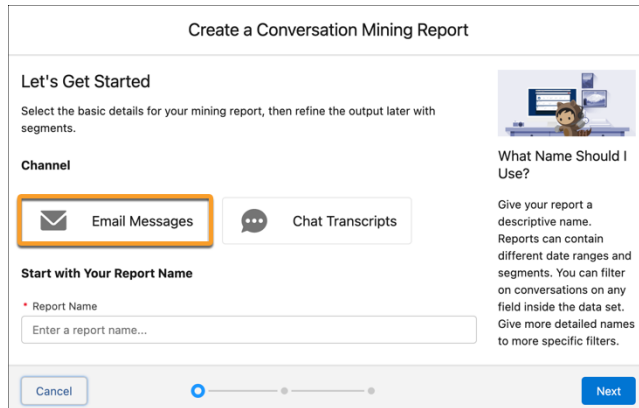
## Include Email Conversations When You Build Your Conversation Mining Reports (Pilot)

Now you can use email conversations to build reports with Einstein Conversation Mining. These reports help you better understand and identify common cases or customer issues. Previously, Einstein Conversation Mining looked only at your live chat transcripts.

**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 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:** Go to Einstein Conversation Mining in Setup and turn on the email channel pilot. Then, when you create a report, select **Email Messages** for the channel.



**Create a Conversation Mining Report**

**Let's Get Started**  
Select the basic details for your mining report, then refine the output later with segments.

**Channel**

☒ Email Messages ☐ Chat Transcripts

**Start with Your Report Name**

\* Report Name  
Enter a report name...

**What Name Should I Use?**  
Give your report a descriptive name. Reports can contain different date ranges and segments. You can filter on conversations on any field inside the data set. Give more detailed names to more specific filters.

Cancel Progress indicator Next

SEE ALSO:

[Salesforce Help: Build an Einstein Conversation Mining Report](#)

## Get Service Insights and Build Bot Intents with Einstein Conversation Mining (beta)

Replace time-consuming transcript analysis with Einstein Conversation Mining (beta). Transform conversation data into service insights and build bot intents.

**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:** Create reports based on specific audience details, using any field on your live chat transcript or associated case record. The ability to create multiple reports based on filters of the same dataset helps you customize bots for different customers' needs. Einstein then groups and ranks the requests, identifying the contact reasons that are most frequent and easiest to automate.

**Top Recommendations**

**have, premier league soccer question**

**Summary**  
english premier league soccer

**Excerpts**  
Hello. I need to know what place the English Premie...  
How is Brighton doing?  
Are they playing now?

<b>5.00 min</b> Average Duration	<b>12.72</b> Average Turns	<b>10.19%</b> of Chats	<b>793</b> Chats
----------------------------------------	----------------------------------	------------------------------	---------------------

[View Details](#)

**look, place**

**Summary**  
takeout food

**Excerpts**  
Hi. I'd like to order takeout.  
Hello. I'd like to order takeout burritos for one perso...  
Yeah, I'd like to order some takeout for two people.

<b>5.00 min</b> Average Duration	<b>12.74</b> Average Turns	<b>5.81%</b> of Chats	<b>452</b> Chats
----------------------------------------	----------------------------------	-----------------------------	---------------------

[View Details](#)

**music, hear**

**Summary**  
hear some music by taylor swift,hear some music  
by michael buble,hear some music by billy joel

**Excerpts**  
Hi, can I hear a song by J Cole?  
Hi, can I hear a song by Kendrick Lamar?  
I would like to listen some music by George Jones.

<b>5.00 min</b> Average Duration	<b>12.8</b> Average Turns	<b>5.43%</b> of Chats	<b>423</b> Chats
----------------------------------------	---------------------------------	-----------------------------	---------------------

[View Details](#)

**Topics**

7 Topics containing 51 Contact Reasons from Chat Transcripts. Sorted by significance.

[Download](#)

**hotel, find**

<b>21.27%</b> of Chats	<b>1,656</b> Chats	<b>5 min</b> Average Duration	<b>23.05</b> Average Turns
---------------------------	-----------------------	----------------------------------	-------------------------------

> 18 Contact Reasons

Then, send the chat data from the contact reason over to Einstein Bots or create an intent set.

**How:** Go to Einstein Conversation Mining in Setup. 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.

SEE ALSO:

[Salesforce Help: Einstein Conversation Mining](#)

[Salesforce Help: Create a Bot from Your Data](#)

## Einstein Reply Recommendations

Optimize agent productivity and response quality with AI-generated replies. Update replies with on demand template creation, get reply recommendations in enhanced messaging channels, and the model that recommends replies to agents during chats is automatically retrained each month.

IN THIS SECTION:

[Optimize Agent Productivity and Response Quality with Service Replies](#)

Service Replies drafts AI-generated responses for your agent while a chat unfolds, without separate model training. Einstein GPT uses customer conversations to ensure responses that are fluent, courteous, and relevant.

[Refresh Your Replies with On-Demand Template Creation](#)

Keep your recommendations fresh by checking for new reply templates. Previously, you could train your model and get new replies only at build time. Now you can update your replies on-demand to include data from your agents' most recent closed chats.

### [Offer Agents Reply Recommendations in Enhanced Messaging Channels](#)

Now available on Messaging for In-App and Web and enhanced messaging channels, Einstein Reply Recommendations suggests the best quick text responses to a user's messages. Agents can send a recommended reply in a messaging session with just one click.

### [Enhance Your Reply Recommendations Model](#)

Keep your recommendations fresh with enhanced learning and automatic model retraining. Now, the model that recommends replies to agents as a chat unfolds is automatically retrained each month, so they get more accurate, useful replies that evolve alongside your service setup. Before, your reply recommendation model was built entirely during setup, with a single refresh.

SEE ALSO:

[Einstein Release Notes](#)

## Optimize Agent Productivity and Response Quality with Service Replies

Service Replies drafts AI-generated responses for your agent while a chat unfolds, without separate model training. Einstein GPT uses customer conversations to ensure responses that are fluent, courteous, and relevant.

**Where:** This change applies to Unlimited editions with Service Cloud Einstein and the Einstein GPT for Service add-on. Einstein GPT is available in Lightning Experience. Setup for Einstein GPT is available in Lightning Experience.

To purchase the Einstein GPT for Service add-on, contact your Salesforce Account Executive.

**How:** Turn on Service Replies from the Einstein Reply Recommendations page in Setup. Service Replies uses a generic model that doesn't require separate model training.

To give agents access to Service Replies in the Einstein Reply Recommendations Component, assign them a permission set.

SEE ALSO:

[Salesforce Help: Einstein GPT Service Replies](#)

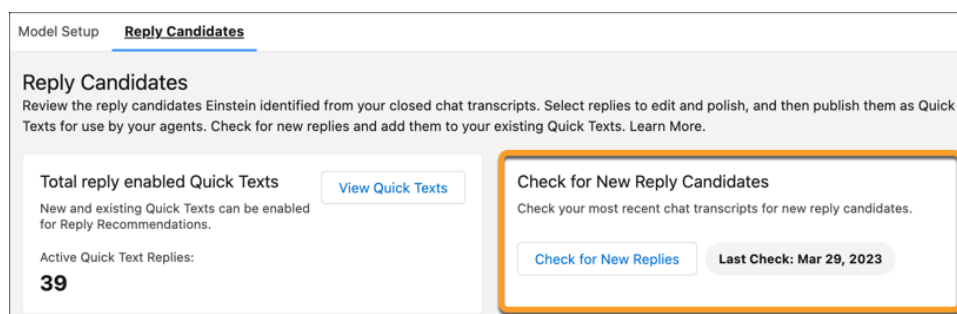
[Salesforce Help: About Einstein GPT](#)

## Refresh Your Replies with On-Demand Template Creation

Keep your recommendations fresh by checking for new reply templates. Previously, you could train your model and get new replies only at build time. Now you can update your replies on-demand to include data from your agents' most recent closed chats.

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

**How:** Go to Reply Recommendations in Setup. On your model's Settings page, select the **Reply Candidates** tab. To update your replies, select **Check for New Replies**.



After a major change in support conversations or when you've accumulated at least 10,000 new transcripts, check for new replies. Or check on a regular schedule, such as quarterly, every 6 months, or in a new product cycle.

SEE ALSO:

[Salesforce Help: Review and Publish Replies](#)

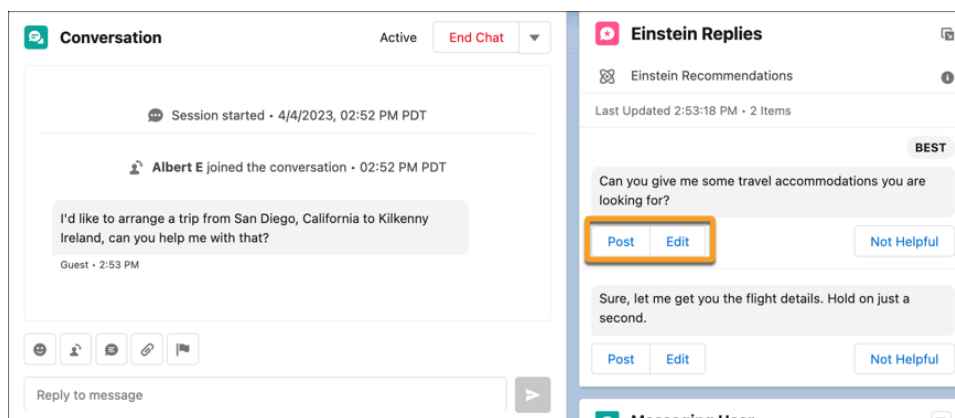
## Offer Agents Reply Recommendations in Enhanced Messaging Channels

Now available on Messaging for In-App and Web and enhanced messaging channels, Einstein Reply Recommendations suggests the best quick text responses to a user's messages. Agents can send a recommended reply in a messaging session with just one click.

**Where:** This change applies to Messaging for In-App and Web, and Enhanced Messaging Channels in Lightning Experience and Salesforce Classic in Enterprise, Performance, and Unlimited editions. [View required editions.](#)

**Who:** Salesforce admins with the Customize Application permission can turn on Einstein Reply Recommendations. Agents with the Einstein Reply Recommendations User permission set can use Reply Recommendations.

**How:** Enable this feature on the Einstein Reply Recommendations from Setup. Build a model, and then review and publish replies for agents to use in the Einstein Replies component.



Agents click **Post** to insert a recommended reply into a messaging conversation.

SEE ALSO:

[Salesforce Help: Add Flexibility and Power with Messaging for In-App and Web](#)

## Enhance Your Reply Recommendations Model

Keep your recommendations fresh with enhanced learning and automatic model retraining. Now, the model that recommends replies to agents as a chat unfolds is automatically retrained each month, so they get more accurate, useful replies that evolve alongside your service setup. Before, your reply recommendation model was built entirely during setup, with a single refresh.

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

**How:** Go to Reply Recommendations in Setup. To see the latest build date, on your model's Settings page, select the **Model Setup** tab.



Model Setup Reply Candidates			
<b>Languages</b> Use Reply Recommendations for multiple languages. Einstein detects languages from chat transcripts, then determines if you can build a model based on the number of transcripts.			
Last Build February 6, 2023			
Language	Number of Transcripts	Readiness	Status
English	Good; 1,000-9,999	Active	✓ Enabled
French	Too Low; < 1,000	⊘ Excluded	⏻ Disabled
Spanish	Too Low; < 1,000	⊘ Excluded	⏻ Disabled

SEE ALSO:

[Salesforce Help: Build Your Recommendation Model](#)

## Service Catalog

Service Catalog helps you turn requests for your company's products and services into approved and documented orders through self-service automation.

IN THIS SECTION:

[Deliver Products and Services with Service Catalog \(Generally Available July 18, 2023\)](#)

Use Service Catalog, now generally available, to turn your customers' requests for products and services into approved and documented orders. For example, automate frequent requests like resetting a password. Previously, Service Catalog was available only as part of Work.com.

[Open Your Service Catalog to Customers and Partners](#)

Create a Service Catalog site that provides your customer and partners a self-service portal for the seamless browsing and requesting of items from your Service Catalog. Build, style, and launch your site effortlessly with point-and-click Aura components built for Service Catalog and with prebuilt Aura site templates from Experience Cloud.

[Expanded Access to Uploaded Images](#)

Images uploaded in Service Catalog are created in isVisibleByExternalUsers mode so file assets are available to unauthenticated users by default. Previously, image uploads in Service Catalog weren't available to unauthenticated users by default.

## Deliver Products and Services with Service Catalog (Generally Available July 18, 2023)

Use Service Catalog, now generally available, to turn your customers' requests for products and services into approved and documented orders. For example, automate frequent requests like resetting a password. Previously, Service Catalog was available only as part of Work.com.

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

**Who:** To access Service Catalog, assign the Service Catalog Access permission set license.

**How:** From Setup, in the Quick Find box, enter *Service Catalog*, and under Process Automation, select **Service Catalog**.

## Open Your Service Catalog to Customers and Partners

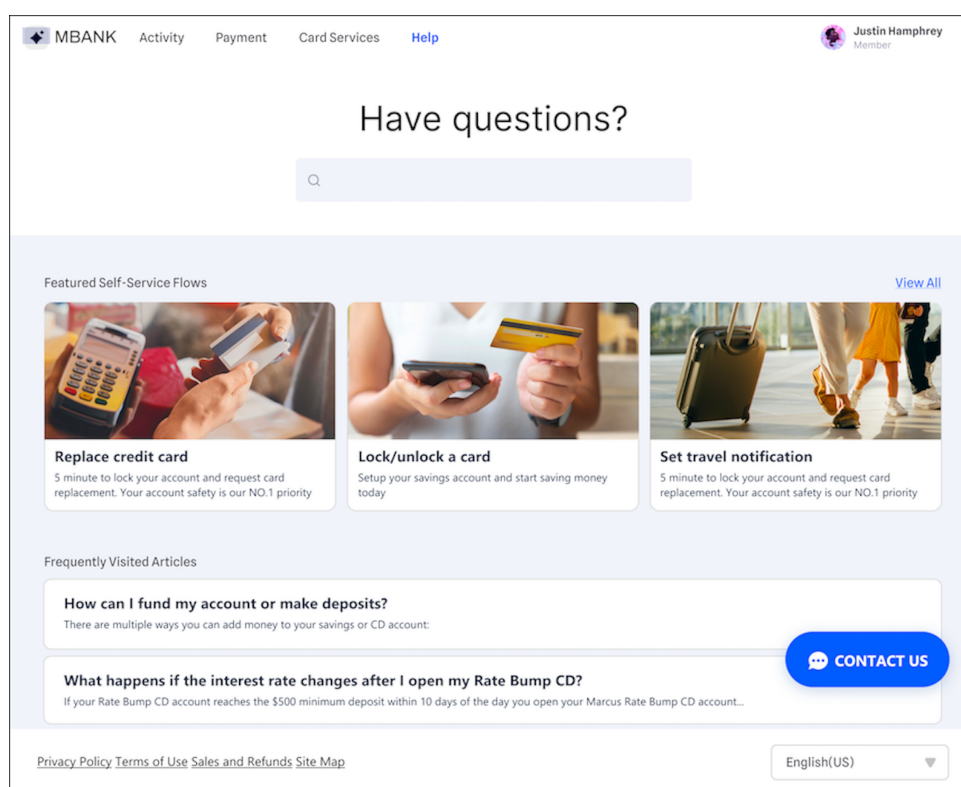
Create a Service Catalog site that provides your customer and partners a self-service portal for the seamless browsing and requesting of items from your Service Catalog. Build, style, and launch your site effortlessly with point-and-click Aura components built for Service Catalog and with prebuilt Aura site templates from Experience Cloud.

**Where:** This change applies to Lightning Experience in Unlimited edition with Service Cloud.

**Who:** You must have a Customer Community, Customer Community Plus, Partner Community, External Apps, or Channel Community license to use this feature.

**Why:** The Service Catalog site uses several custom, no-code Aura components that provide you with an easy setup experience to quickly open your Service Catalog to your customers and partners. Just drag the components onto the customizable site pages from Experience Cloud, and then style each component to match your branding preferences.

Here's an example of a Service Catalog site that uses the custom Aura components.



**How:** Head to Salesforce Setup to prep your Service Catalog to become a customer or partner-facing site. Then, use Experience Builder to quickly build the pages and configure the components that comprise your Service Catalog site.

## Expanded Access to Uploaded Images

Images uploaded in Service Catalog are created in `isVisibleByExternalUsers` mode so file assets are available to unauthenticated users by default. Previously, image uploads in Service Catalog weren't available to unauthenticated users by default.

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

## Service Cloud Channels

Take advantage of new features in Messaging and Service Cloud Voice, and explore new tools available in multiple Service Cloud channels.

### IN THIS SECTION:

#### [Messaging](#)

Explore a range of new agent and supervisor capabilities in Messaging. Send voice messages and messaging components in both enhanced WhatsApp and enhanced Facebook Messenger channels. Add dropdown fields to your pre-chat form, hide your website or app messaging window outside of business hours, and add Messaging for Web to your Channel Menu. Trigger an action, such as raising the agent's flag, when a keyword is sent in a messaging session. Automatically search, link, or screen pop records about the customer in messaging sessions with Individual-Object Linking, the reimagined, flow-based version of Channel-Object Linking. And, enjoy more control over how and when messaging sessions are marked inactive or ended.

#### [Voice](#)

Make more calls faster with agent-to-agent calls. Evaluate Service Cloud Voice setup, agent workstation setup, Voice channel performance, and agent connections with on-demand checks and metrics. Access Service Cloud Voice with the Microsoft Edge (Chromium) browser.

#### [Channel Tools](#)

Link contacts, employees, leads, and customers to other records with Individual-Object Linking. Modernize your customers' communication experience by adding Messaging for Web to your Channel Menu. And export your conversation transcripts for Voice or Messaging before letting your Salesforce org expire.

## Messaging

Explore a range of new agent and supervisor capabilities in Messaging. Send voice messages and messaging components in both enhanced WhatsApp and enhanced Facebook Messenger channels. Add dropdown fields to your pre-chat form, hide your website or app messaging window outside of business hours, and add Messaging for Web to your Channel Menu. Trigger an action, such as raising the agent's flag, when a keyword is sent in a messaging session. Automatically search, link, or screen pop records about the customer in messaging sessions with Individual-Object Linking, the reimagined, flow-based version of Channel-Object Linking. And, enjoy more control over how and when messaging sessions are marked inactive or ended.

### IN THIS SECTION:

#### [Send Voice Messages in Enhanced Messaging Channels](#)

Voice is the new text, so make sure your agents don't miss out. Agents can now easily record and send voice messages up to one minute long to customers in enhanced WhatsApp and enhanced Facebook Messenger channels. Previously, agents had to use a separate app to record messages and then send the audio files as attachments.

#### [Send Messaging Components in Enhanced WhatsApp Channels](#)

Add some flair and efficiency to your enhanced WhatsApp messaging sessions. Agents and bots can now use messaging components to send links, questions with options, and time selectors to customers. You can use a messaging component in any enhanced Messaging channel or Messaging for In-App and Web. There's no need to create a separate component for each channel type.

#### [Let Messaging for In-App and Web Conversations Continue Across Multiple Channels](#)

Let customers begin a conversation on your website and continue it on your mobile app. Additionally, let them continue a conversation across multiple websites (on the same domain or subdomain) or converse across multiple mobile apps.

### [Hide the Messaging for In-App or Web Button Outside of Your Business Hours](#)

Don't leave your customers waiting. Prevent customers from starting new messaging sessions outside of your business hours. After setting business hours, the Messaging for Web button disappears when you're not working. The Messaging for In-App button displays by default, but customers see a banner letting them know that your business hours are over. Use the API to prevent incoming Messaging for In-App conversations outside of business hours.

### [Control the Messaging for Web Button's Visibility Programmatically on Your Website](#)

Choose to hide or display the chat button with a new dropdown field (for Experience Builder or Commerce Cloud users) or a new API (for third-party website users). By default, the chat button is always visible, unless it's outside of business hours. This dropdown field or API lets you override the default rule and the business hours rule. For example, you can hide the chat button on certain pages where you don't want a conversation to be initiated, or implement your own chat button in a different part of your website.

### [Identify the Messaging Customer with Individual-Object Linking](#)

Equip agents with more information while they're messaging with customers. Individual-Object Linking, formerly Channel-Object Linking, uses flows to automatically search, link, or screen pop records about the customer in a messaging session.

### [Create Real-Time Keyword Alerts for Supervisors in Messaging Channels](#)

If a customer or agent sends a high-stakes keyword or phrase, automatically raise the agent's flag so their supervisor can help if needed.

### [Automatically Mark Messaging Sessions Inactive in Messaging for In-App and Web](#)

Set a time limit on idle messaging sessions so that agents can focus on active conversations. If a customer stops responding, the session is automatically marked as inactive and the customer can be notified with an auto-response.

### [Mark Messaging Sessions Inactive in the Conversation Window](#)

Help your active customers faster. The new Inactive Customer option gives agents another way to leave idle conversations so that they can accept incoming messaging sessions. Agents are still prompted to end or inactivate a session when they close the session tab in the Service Console.

### [Message Customers More Intuitively with the Redesigned Agent Conversation Window](#)

You asked, we listened. The Send and End Chat buttons are now separated in the agent conversation window. Additionally, the toolbar now lives above the message field. These subtle changes help agents click the correct button and find the tools they need during messaging sessions.

### [Add Dropdown Fields to Your Pre-Chat Form in Messaging for In-App and Web](#)

To gather more contextual information from customers and improve routing, let them select from a list of prewritten values in your pre-chat form. For example, add a dropdown called Support Reason and ask the customer to select their issue. Then route the conversation to the agent best suited to support that issue.

### [Choose When to Show a Pre-Chat Form in Messaging for In-App and Web](#)

Collect valuable information from your customer by presenting a pre-chat form every time they begin a new messaging session or conversation. Use this pre-chat data to route the conversation to the agent who is best equipped to help. Previously, the pre-chat form could only be shown to the customer the first time they message you.

### [Modernize Your Channel Menu with Messaging for Web](#)

To offer your customers an asynchronous, persistent digital experience, add Messaging for Web to your Channel Menu.

### [Let Agents Accept Omni-Routed Messaging Sessions in Messaging for In-App and Web](#)

To expand Messaging for In-App and Web beyond Service Cloud, we created a permission set license for Messaging for In-App and Web agents. Previously, agents needed the Service Cloud User license to do this.

### [Fine-Tune Messaging Session Expiration to Accommodate Your Security Requirements](#)

Control when a messaging session gets renewed by your website or mobile app to continue the conversation. The new authorization token expiration fields give you the flexibility to balance security versus convenience.

### [Let Customers Navigate Your Website While Maintaining a Messaging for Web Conversation](#)

Your customers can navigate from your parent domain (www.example.com) to your subdomains (help.example.com) and maintain a seamless Messaging for Web conversation without interruption. Previously, customers would have to begin a new conversation if they navigated between your parent domain and subdomains.

### [Say Goodbye to the Messaging for In-App and Web SKU](#)

To expand Messaging for In-App and Web to Sales Cloud and Starter Edition, Salesforce customers who are setting up Messaging for In-App and Web for the first time after the Summer '23 release can accept terms and conditions when activating their first messaging channel. The Activate button now appears when you click on the name of your channel in Messaging Settings. This new user experience replaces the need to purchase a Messaging for In-App and Web \$0 SKU.

### [Align Your Business with New Certifications in Messaging](#)

Messaging for In-App and Web makes it easy to comply with HIPAA, NEN 7510, C5 (ISAE 3000), ASP/SaaS, and ASIP Santé HDS certifications. Enhanced Messaging channels make it easy to comply with C5 (ISAE 3000) and ASP/SaaS certifications.

### [End Conversations and Engage Bots with the Enhanced Bot Options Menu](#)

The icon to end a messaging conversation has changed from an X to a menu icon. Your customers can click the menu icon to end a conversation or navigate a chat with an enhanced bot.

### [Add User Verification to Messaging for Web in Aura Sites](#)

You can now add User Verification to Messaging for Web deployments on Aura sites created with the Build Your Own Aura, Help Center, and Customer Service templates in Experience Builder. Previously, User Verification in Messaging for Web could be added only to an external website.

### [Find the Right Answer to a Customer's Question with Reply Recommendations in Messaging](#)

Now available in Messaging for In-App and Web and enhanced messaging channels, Einstein Reply Recommendations suggests the best quick text response to a customer's question. Agents can send a recommended reply in a messaging session with just one click.

### [Improve the Enhanced Messaging Console Experience Using the Lightning Conversation Toolkit API](#)

More methods and events now handle enhanced Messaging channels so that you can send commands and listen for events directly from your Lightning console app.

### [Other Improvements to Messaging for In-App and Web](#)

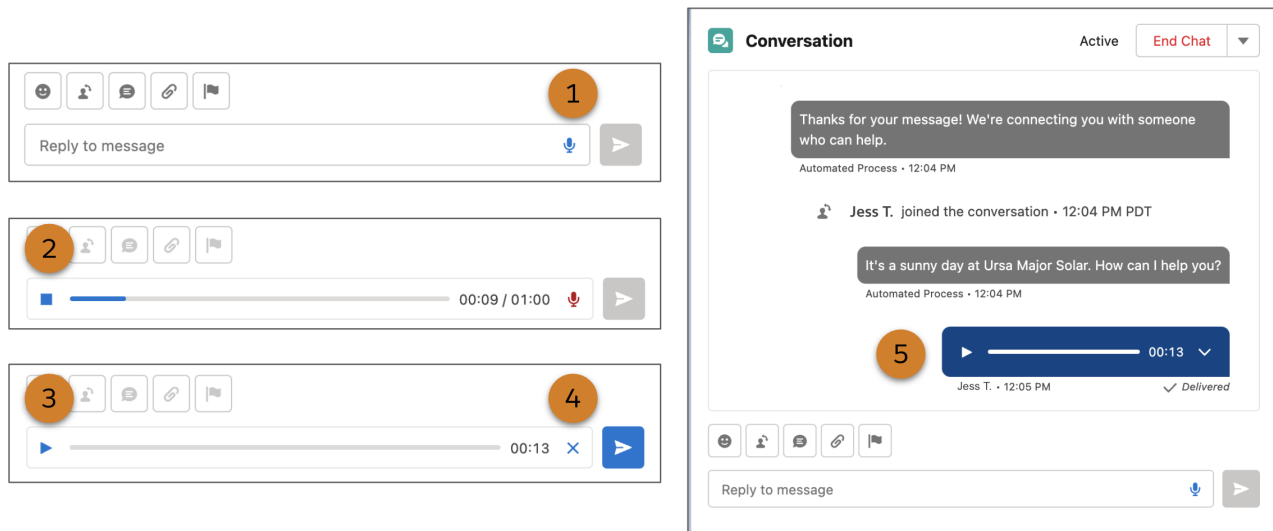
Learn about additional improvements we've made to the admin and agent experience in Messaging for In-App and Web.

## Send Voice Messages in Enhanced Messaging Channels

Voice is the new text, so make sure your agents don't miss out. Agents can now easily record and send voice messages up to one minute long to customers in enhanced WhatsApp and enhanced Facebook Messenger channels. Previously, agents had to use a separate app to record messages and then send the audio files as attachments.

**Where:** This change applies to enhanced WhatsApp and enhanced Facebook Messenger channels. [View required editions.](#)

**How:** To record a message during an enhanced messaging session, make sure your web browser has access to your microphone. Then, click the microphone icon in the message field (1) and start talking. Click the stop icon (2) when you're done. Optionally, play back your message (3) or delete it (4). When you're ready, send it to the customer (5).



After a voice message is sent, the customer can access it for 30 days. Voice messages are included in the conversation transcript just like any other message.

SEE ALSO:

[Salesforce Help: Send Voice Messages in Messaging Sessions \(can be outdated or unavailable during release preview\)](#)

## Send Messaging Components in Enhanced WhatsApp Channels

Add some flair and efficiency to your enhanced WhatsApp messaging sessions. Agents and bots can now use messaging components to send links, questions with options, and time selectors to customers. You can use a messaging component in any enhanced Messaging channel or Messaging for In-App and Web. There's no need to create a separate component for each channel type.

**Where:** This change applies to enhanced WhatsApp channels. [View required editions.](#)

**How:** Create messaging components on the Messaging Components page in Setup. Then, add messaging components to the Service Console using the Messaging Components and Flow page components.

Images don't appear with list options in enhanced WhatsApp channels. Even if you add images to your component, customers see only the accompanying text.

When you add formats to your time selector or question with options messaging component, keep these limits in mind: In WhatsApp, the Buttons format supports up to 3 list options and the List Selector format supports up to 10. If your component contains more than the maximum number of options, the component's next available format is used.

SEE ALSO:

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

[Salesforce Help: Send Messaging Components in Messaging Sessions \(can be outdated or unavailable during release preview\)](#)

## Let Messaging for In-App and Web Conversations Continue Across Multiple Channels

Let customers begin a conversation on your website and continue it on your mobile app. Additionally, let them continue a conversation across multiple websites (on the same domain or subdomain) or converse across multiple mobile apps.

**Where:** This change applies to Messaging for In-App and Web. [View required editions.](#)

**How:** Follow the setup steps to add user verification to each channel that you want to sync. Ensure that the Configuration Name field has the same value across all synced channels. When the Configuration Name field has the same value across messaging channels, a customer's conversation can persist across them.

## Add User Verification Configuration

Add a user verification configuration for this messaging channel.

\* Keyset ⓘ  
Select a keyset... ▼

\* Configuration Name ⓘ  
Enter a configuration name...

☒ Active

Cancel Save

SEE ALSO:

[Salesforce Help: Set Up User Verification \(can be outdated or unavailable during release preview\)](#)

## Hide the Messaging for In-App or Web Button Outside of Your Business Hours

Don't leave your customers waiting. Prevent customers from starting new messaging sessions outside of your business hours. After setting business hours, the Messaging for Web button disappears when you're not working. The Messaging for In-App button displays by default, but customers see a banner letting them know that your business hours are over. Use the API to prevent incoming Messaging for In-App conversations outside of business hours.

**Where:** This change applies to Messaging for In-App and Web. [View required editions.](#)

**Who:** To create business hours, you need the Manage Business Hours Holidays permission. To add business hours to your deployment, you need the Customize Application and Modify Metadata Through Metadata API Functions permissions.

**How:** Create a business hours record in Setup. Then click **Edit Settings** on your deployment's settings page, and add the business hours record. These steps prevent the chat button from displaying outside of business hours in Messaging for Web. To prevent incoming chats outside of business hours in Messaging for In-App, use our API.

**Customer User Interface**

☐ Show delivery receipts  
Provide a notice to customers when their message is sent to an agent.

☐ Show read receipts  
Alert customers that their message was read by the agent.

☐ Show typing indicators  
Activate the agent is typing animation in the chat window.

☐ Show emoji keyboard  
Let customers send emojis.

☐ Press Enter/Return to start a new line of text  
If this option isn't selected, pressing Enter/Return sends a message by default and Option + Enter/Return starts a new line

**Business Hours**

Set business hours to receive messages when your agents are working. The messaging window is hidden outside of business hours. [Create Business Hours](#)

Business Hours ⓘ

Select business hours... 🔍

Cancel Save

SEE ALSO:

[Salesforce Developer Guide: Messaging for Web](#) (can be outdated or unavailable during release preview)

[Salesforce Developer Guide: Messaging for In-App](#) (can be outdated or unavailable during release preview)

[Salesforce Help: Set Business Hours](#) (can be outdated or unavailable during release preview)

[Salesforce Help: Set Business Hours in Messaging for In-App and Web](#) (can be outdated or unavailable during release preview)

## Control the Messaging for Web Button's Visibility Programmatically on Your Website

Choose to hide or display the chat button with a new dropdown field (for Experience Builder or Commerce Cloud users) or a new API (for third-party website users). By default, the chat button is always visible, unless it's outside of business hours. This dropdown field or API lets you override the default rule and the business hours rule. For example, you can hide the chat button on certain pages where you don't want a conversation to be initiated, or implement your own chat button in a different part of your website.



**Where:** This change applies to Messaging for Web. [View required editions.](#)

SEE ALSO:

[Salesforce Help: Configure a Messaging for Web Deployment in an Experience Builder or Commerce Cloud site \(can be outdated or unavailable during release preview\)](#)

[Salesforce Developer Guide: Messaging for Web \(can be outdated or unavailable during release preview\)](#)

## Identify the Messaging Customer with Individual-Object Linking

Equip agents with more information while they're messaging with customers. Individual-Object Linking, formerly Channel-Object Linking, uses flows to automatically search, link, or screen pop records about the customer in a messaging session.

**Where:** This change applies to standard and enhanced Messaging channels and Messaging for In-App and Web. [View required editions.](#)

SEE ALSO:

[Salesforce Release Notes: Identify the Human Behind the Interaction with Individual-Object Linking \(can be outdated or unavailable during release preview\)](#)

## Create Real-Time Keyword Alerts for Supervisors in Messaging Channels

If a customer or agent sends a high-stakes keyword or phrase, automatically raise the agent's flag so their supervisor can help if needed.

**Where:** This change applies to enhanced Messaging channels and Messaging for In-App and Web. [View required editions.](#)

**How:** On the Conversation Intelligence Rules page in Setup, create a rule. Select an action to take when a keyword is sent: Update a Next Best Action, run an auto-launched flow, alert the supervisor, or alert the supervisor and agent. Select your Messaging service channel, choose whose messages to scan for keywords, and add one or more keywords.

**Create Rule**

Create a rule for conversations that occur in the selected service channel instance. For the rule, select the action to perform when a Conversation Intelligence signal from the specified intelligence source is detected.

☒ Active ⓘ

\* Rule Label ⓘ  
Beeping Solar Panel

\* Developer Name ⓘ  
Beeping\_Solar\_Panel

\* Action ⓘ  
Alert the Supervisor

\* Service Channel Instance ⓘ  
MIAW\_Messaging

\* Trigger Type  
☒ Matching keyword

\* Detect keywords mentioned by: ⓘ  
Either

Enter a keyword... Add

1	beeping	×
2	beeps	×
3	beep	×

Save

SEE ALSO:

[Salesforce Help: Automatically Trigger an Action Based on Detected Keywords \(can be outdated or unavailable during release preview\)](#)

## Automatically Mark Messaging Sessions Inactive in Messaging for In-App and Web

Set a time limit on idle messaging sessions so that agents can focus on active conversations. If a customer stops responding, the session is automatically marked as inactive and the customer can be notified with an auto-response.

**Where:** This change applies to Messaging for In-App and Web. [View required editions.](#)

**How:** Create an auto-response messaging component that explains why the conversation ended. On your messaging channel's settings page in Setup, select the messaging components in the Inactive Conversation field and set the length of time that a conversation can be idle before the auto-response is sent.

To automatically set a session to inactive, go to Messaging Settings in Setup and click to edit your channel. Select **Automatically mark conversations inactive after a period of customer inactivity**, then indicate how many minutes until the session times out.

To send a confirmation message after a session becomes inactive, first create an auto-response component. Then add it to the Inactive Conversation box in the Edit page for your messaging channel.

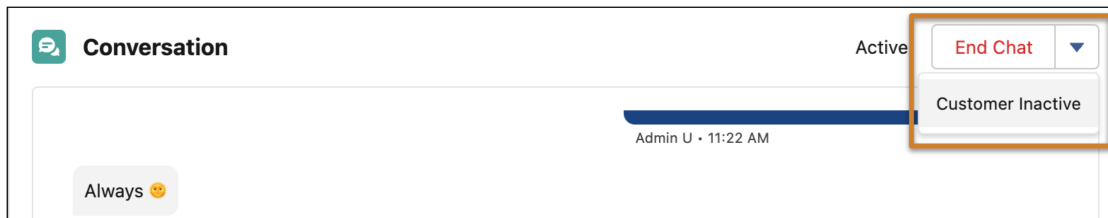
If the customer sends a response after the session is marked inactive, they're routed to an agent. Inactive sessions are automatically ended after approximately 30 hours.

## Mark Messaging Sessions Inactive in the Conversation Window

Help your active customers faster. The new Inactive Customer option gives agents another way to leave idle conversations so that they can accept incoming messaging sessions. Agents are still prompted to end or inactivate a session when they close the session tab in the Service Console.

**Where:** This change applies to enhanced Messaging channels and Messaging for In-App and Web. [View required editions.](#)

**How:** Click the dropdown next to End Chat, and select **Customer Inactive**.



If the customer sends a response after the session is marked inactive, they're routed to an available agent. Inactive sessions are automatically ended after approximately 30 hours.

SEE ALSO:

[Salesforce Help: Lifecycle of a Messaging Session \(can be outdated or unavailable during release preview\)](#)

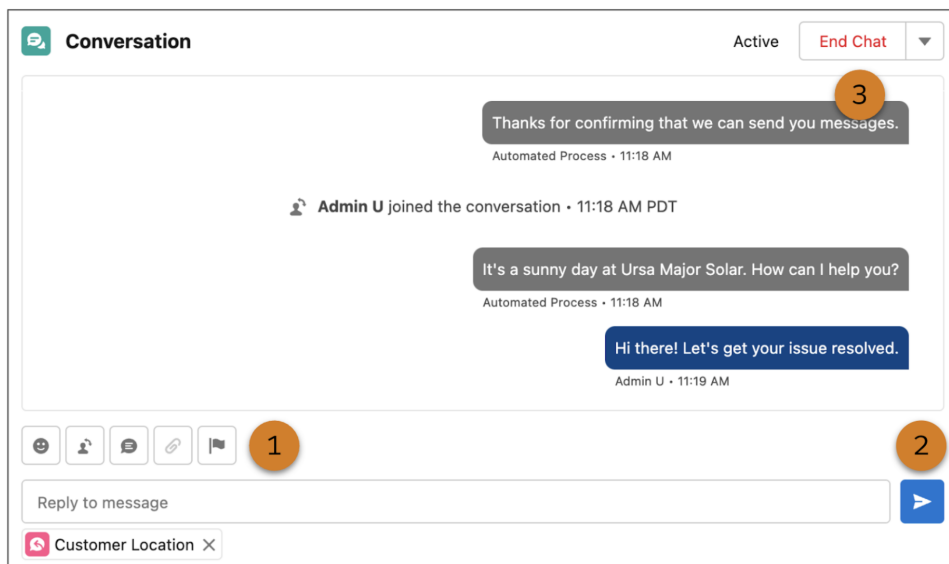
[Salesforce Help: End or Transfer a Messaging Session \(can be outdated or unavailable during release preview\)](#)

## Message Customers More Intuitively with the Redesigned Agent Conversation Window

You asked, we listened. The Send and End Chat buttons are now separated in the agent conversation window. Additionally, the toolbar now lives above the message field. These subtle changes help agents click the correct button and find the tools they need during messaging sessions.

**Where:** This change applies to enhanced Messaging channels and Messaging for In-App and Web. [View required editions.](#)

**How:** Locate the toolbar above the message field (1). Click **Send** next to the message field (2). End the chat above the conversation window (3).



## Add Dropdown Fields to Your Pre-Chat Form in Messaging for In-App and Web

To gather more contextual information from customers and improve routing, let them select from a list of prewritten values in your pre-chat form. For example, add a dropdown called Support Reason and ask the customer to select their issue. Then route the conversation to the agent best suited to support that issue.

**Where:** This change applies to Messaging for In-App and Web. [View required editions.](#)

**Who:** To create a dropdown field and add it to your pre-chat form, you need the Customize Application permission.

**How:** In your deployment's settings page, click to edit the pre-chat form. Select Custom to add a new field, and fill in the details to make it a dropdown. You have the option to select a default field value, re-order the field values, or create custom labels for the field values.

SEE ALSO:

[Salesforce Help: Customize Pre-Chat for Messaging for In-App and Web \(can be outdated or unavailable during release preview\)](#)

## Choose When to Show a Pre-Chat Form in Messaging for In-App and Web

Collect valuable information from your customer by presenting a pre-chat form every time they begin a new messaging session or conversation. Use this pre-chat data to route the conversation to the agent who is best equipped to help. Previously, the pre-chat form could only be shown to the customer the first time they message you.

**Where:** This change applies to Messaging for In-App and Web. [View required editions.](#)

**Who:** To choose when to show the pre-chat form for a Messaging for In-App or Messaging for Web deployment, you need the Customize Application permission.

**How:** Click **Edit Pre-Chat** in your deployment settings page, and select **Every Conversation** or **Every Session** from the Pre-Chat Display Frequency dropdown.

If you select **Every Conversation**, the display frequency of the pre-chat form depends on whether you add user verification to your messaging channel. If you add user verification, a Messaging for In-App and Web conversation has no end. Your customer sees the pre-chat form only when messaging you for the first time. If you don't add user verification, a customer can click **End Chat** to end a conversation. They see the pre-chat form the first time that they message, and each subsequent time that they end a conversation and start a new one.

If you select **Every Session**, the display frequency of the pre-chat form also depends on whether you add user verification to your messaging channel:

- In Messaging for In-App without user verification, the messaging session ends when the agent clicks **End Chat**. Your customer sees the pre-chat form the first time that they message you, and each time they begin a new session after an agent ended the previous one.
- In Messaging for Web without user verification, the messaging session ends when the customer or agent clicks **End Chat**. Your customer sees the pre-chat form the first time that they message you, and each time they begin a new session after a previous session is ended.
- In Messaging for In-App with user verification, the messaging session ends when the agent clicks **End Chat**. Your customer must be logged in to see the messaging conversation, including the pre-chat form. Your customer sees the pre-chat form the first time that they message you, and the next time they log in and begin a new session after a previous session was ended by an agent.
- In Messaging for Web with User Verification, the messaging session ends when the agent clicks **End Chat**. Your customer sees the pre-chat form the first time that they message you, and the next time they begin a new session after the previous session was ended by an agent.

... > URSA\_MAJOR\_SOLAR\_CUSTOMER\_SUPPORT > PRE-CHAT

## Pre-Chat Form

Connect messaging conversations to Salesforce records using pre-chat fields. Ask customers to fill in fields on the pre-chat form. You can also collect data behind the scenes with hidden pre-chat fields. [Connect your custom fields to parameters](#), or [learn about pre-chat fields in Salesforce Help](#)

☐ Activate the pre-chat feature

Pre-Chat Display Frequency

Every Session ▼

Every Conversation

✓ Every Session

at least one field.

SEE ALSO:

[Salesforce Help: Customize Pre-Chat for Messaging for In-App and Web](#) (can be outdated or unavailable during release preview)

## Modernize Your Channel Menu with Messaging for Web

To offer your customers an asynchronous, persistent digital experience, add Messaging for Web to your Channel Menu.

**Where:** This change applies to Messaging for Web. [View required editions](#).

SEE ALSO:

[Salesforce Release Notes: Add Messaging for Web to Your Channel Menu](#) (can be outdated or unavailable during release preview)

## Let Agents Accept Omni-Routed Messaging Sessions in Messaging for In-App and Web

To expand Messaging for In-App and Web beyond Service Cloud, we created a permission set license for Messaging for In-App and Web agents. Previously, agents needed the Service Cloud User license to do this.

**Where:** This change applies to Messaging for In-App and Web. [View required editions](#).

**How:** When you create a permission set for your agents, select the **Messaging for In-App and Web Agent** permission in App Permissions. New and existing Salesforce customers are encouraged to add this permission to their Agents' Messaging for In-App and Web permission sets.

SEE ALSO:

[Salesforce Help: Give Users Access to Messaging for In-App and Web](#) (can be outdated or unavailable during release preview)

## Fine-Tune Messaging Session Expiration to Accommodate Your Security Requirements

Control when a messaging session gets renewed by your website or mobile app to continue the conversation. The new authorization token expiration fields give you the flexibility to balance security versus convenience.

**Where:** This change applies to Messaging for In-App and Web. [View required editions.](#)

**Who:** To set the authorization token expiration time values, you need the Customize Application AND Modify Metadata Through Metadata API Functions permissions.

**How:** Use the two new Messaging channel expiration fields in Setup (Authorization Token Expiration Time for Verified Users and Authorization Token Expiration Time for Unverified Users) to control the expiration time for verified and unverified users. Previously, Messaging for Web sessions expired after six hours for unverified users; now customers can increase that expiration time to 72 hours.

## Let Customers Navigate Your Website While Maintaining a Messaging for Web Conversation

Your customers can navigate from your parent domain (www.example.com) to your subdomains (help.example.com) and maintain a seamless Messaging for Web conversation without interruption. Previously, customers would have to begin a new conversation if they navigated between your parent domain and subdomains.

**Where:** This change applies to Messaging for In-App and Web. [View required editions.](#)

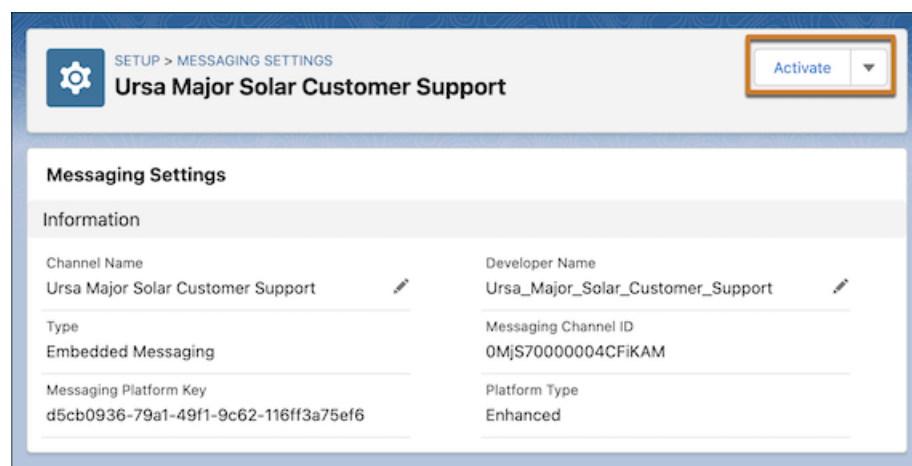
## Say Goodbye to the Messaging for In-App and Web SKU

To expand Messaging for In-App and Web to Sales Cloud and Starter Edition, Salesforce customers who are setting up Messaging for In-App and Web for the first time after the Summer '23 release can accept terms and conditions when activating their first messaging channel. The Activate button now appears when you click on the name of your channel in Messaging Settings. This new user experience replaces the need to purchase a Messaging for In-App and Web \$0 SKU.

**Where:** This change applies to Messaging for In-App and Web. [View required editions.](#)

**Why:** Current Messaging for In-App and Web customers are prompted to accept terms and conditions when they activate their next new channel. All customers have to accept the terms and conditions only once.

**How:** In the Messaging Settings related list, click the name of your channel under Channel Name. On the home page for that channel, click **Activate**. Read the Terms and Conditions, select the checkbox to acknowledge that you read it, and click **Accept**. The Activate button shows the word Active.



## SEE ALSO:

[Salesforce Help: Prepare a Salesforce Org for Messaging for In-App and Web \(can be outdated or unavailable during release preview\)](#)

## Align Your Business with New Certifications in Messaging

Messaging for In-App and Web makes it easy to comply with HIPAA, NEN 7510, C5 (ISAE 3000), ASP/SaaS, and ASIP Santé HDS certifications. Enhanced Messaging channels make it easy to comply with C5 (ISAE 3000) and ASP/SaaS certifications.

**Where:** This change applies to Messaging for In-App and Web. The C5 (ISAE 3000) and ASP/SaaS certifications also apply to Enhanced Messaging channels. [View required editions.](#)

## SEE ALSO:

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

[NEN 7510 \(can be outdated or unavailable during release preview\)](#)

[C5 \(ISAE 3000\) \(can be outdated or unavailable during release preview\)](#)

[ASP/SaaS \(can be outdated or unavailable during release preview\)](#)

[ASIP Santé HDS \(can be outdated or unavailable during release preview\)](#)

## End Conversations and Engage Bots with the Enhanced Bot Options Menu

The icon to end a messaging conversation has changed from an X to a menu icon. Your customers can click the menu icon to end a conversation or navigate a chat with an enhanced bot.

**Where:** These changes apply to Messaging for In-App and Web. [View required editions](#)

## SEE ALSO:

[Add a Bot Options Menu to Your Enhanced Bot](#)

## Add User Verification to Messaging for Web in Aura Sites

You can now add User Verification to Messaging for Web deployments on Aura sites created with the Build Your Own Aura, Help Center, and Customer Service templates in Experience Builder. Previously, User Verification in Messaging for Web could be added only to an external website.

**Where:** This change applies to Messaging for Web in Aura Sites. [View required editions.](#)

**How:** Follow the instructions for adding user verification to your messaging for web deployment. Next, in Experience Builder Settings, go to Security & Privacy for your site. Under Content Security Policy, select **Relaxed CSP: Permit Access to Inline Scripts and Allowed Hosts**. Then, on the Advanced panel, select Edit Head Markup and set your identity token just as you do in a non-Experience Cloud site.

## Find the Right Answer to a Customer's Question with Reply Recommendations in Messaging

Now available in Messaging for In-App and Web and enhanced messaging channels, Einstein Reply Recommendations suggests the best quick text response to a customer's question. Agents can send a recommended reply in a messaging session with just one click.

**Where:** This change applies to Messaging for In-App and Web, and Enhanced Messaging Channels. [View required editions](#).

SEE ALSO:

[Salesforce Release Notes: Offer Agents Reply Recommendations in Enhanced Messaging Channels \(can be outdated or unavailable during release preview\)](#)

## Improve the Enhanced Messaging Console Experience Using the Lightning Conversation Toolkit API

More methods and events now handle enhanced Messaging channels so that you can send commands and listen for events directly from your Lightning console app.

**Where:** This change applies to enhanced Messaging channels and Messaging for In-App and Web. [View required editions](#)

**How:** Methods allow you to send commands and events allow you to listen for activity. The following methods and events have been updated so that you can control the behavior from the Lightning console.

- These Aura methods support enhanced messaging: `endChat`, `getChatLog`, `sendMessage`, and `setAgentInput`.
- These Aura events support enhanced messaging: `lightning:conversationAgentSend`, `lightning:conversationNewMessage`, and `lightning:conversationChatEnded`.
- These Lightning web component events support enhanced messaging: `lightning__conversationAgentSend`, `lightning__conversationEndUserMessage`, and `lightning__conversationEnded`.

SEE ALSO:

[Salesforce Developer Guide: Lightning Console API \(can be outdated or unavailable during release preview\)](#)

## Other Improvements to Messaging for In-App and Web

Learn about additional improvements we've made to the admin and agent experience in Messaging for In-App and Web.

**Where:** These changes apply to Messaging for In-App and Web. [View required editions](#)

**Why:**

- A new Key ID column appears in the Messaging for In-App and Web User Verification Setup page's related list for JSON Web Keys. A new JSON Web Key Issuer column appears on the same page in the JSON Web Keysets related list. If JWT validation isn't working, make sure that the Key ID and JSON Web Key Issuer in the header matches what's in the corresponding fields in the setup page.
- To ensure that subdomain session continuity works, deployments created during or after the Summer '23 release automatically set the domain (example.com) and all subdomains (\*.example.com) to Trusted Domains for Inline Frames. Domains created before 244 take this action the next time that the deployment is republished.
- As a result of offering subdomain session continuity, deployments created during or after the Summer '23 release don't display a Domain field when you click to edit the deployment. Deployments created before the Summer '23 release display a Domain field on the edit page, but it's read-only.
- Messaging for Web customers can send up to 5 file attachments, each up to 5 MB, in one conversation update. Previously, they could send only one attachment at a time.
- Messaging for Web customers can view a preview of a PDF in its thumbnail and see a larger preview image by clicking it.



- Messaging for In-App agents and customers can now send and receive animated GIFs.

**SEE ALSO:**

[Salesforce Help: Persist Secure Messaging History Across Multiple Devices with User Verification \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Considerations and Limitations for Messaging for In-App and Web \(can be outdated or unavailable during release preview\)](#)

## Voice

Make more calls faster with agent-to-agent calls. Evaluate Service Cloud Voice setup, agent workstation setup, Voice channel performance, and agent connections with on-demand checks and metrics. Access Service Cloud Voice with the Microsoft Edge (Chromium) browser.

**IN THIS SECTION:**

### [Add More AWS Services to Service Cloud Voice with Amazon Connect](#)

Easily add more AWS services to your contact center. The Service Cloud Voice Additional AWS Services add-on license offers more services, such as Amazon Pinpoint, Amazon Connect Voice ID, and Amazon Kinesis Data Firehose. The license also provides full capabilities and access to some of the services you already have, such as Amazon CloudWatch, Amazon Dynamo DB, and Amazon EventBridge. Similar to how Salesforce handles telephony charges, the cost of additional services is passed through a monthly invoice. You can review monthly charges on the Service Cloud Voice Usage and Cost Report.

### [Get Agents Online Faster with the Voice Status Utility](#)

To help agents check whether their workspace is ready for Service Cloud Voice, add the Voice Status utility to console apps or Voice extensions. When agents click Run Test, their browser and microphone statuses are verified. Additionally, agents using Service Cloud Voice with Amazon Connect run the Amazon Connect Endpoint Test Utility to verify their connection. If verification fails, messages instruct agents how to debug their Voice setup to connect successfully.

### [Make More Calls Faster with Agent-to-Agent Calls](#)

Telephony partners can add a phone book to the Omni-Channel utility to let agents work off speed dial lists and make agent-to-agent or agent-to-queues calls without a Direct Inward Dialing (DID) number.

### [Automate Softphone Call Control Events](#)

Replace your manual call actions with automated ones, and even build your own softphone UI using Lightning Web Component or Aura component telephony actions. For example, programmatically send softphone call control events, such as accepting, declining, muting, and merging calls; enabling and disabling call recordings; and sending dual tone multi-frequency (DTMF) digits.

### [Access Service Cloud Voice with Microsoft Edge \(Chromium\)](#)

To give you more choices, you can use Service Cloud Voice with the latest stable version of Microsoft Edge (Chromium) browser. Now Voice supports Microsoft Edge (Chromium), Google Chrome, and Mozilla Firefox. To allow single sign-on (SSO), you must enable cookies.

### [Scale Amazon Connect Queue Management with Your Contact Center](#)

When importing Amazon Connect queues into your Salesforce contact center, your import no longer fails due to an Amazon API service limit. We added robust tests to ensure queue imports from Amazon. If you experienced issues importing Amazon Connect queues, try again.

### [Show Voice Extensions for Pre- and Post-Call Work](#)

Voice extensions let you build custom user interfaces and agent actions in the Omni-Channel utility. Previously, agents could access Voice extensions only during calls. Now agents can use extensions before, during, and after calls to accomplish more tasks.

### [Pass Custom Field Data During Transfers and Callbacks](#)

To support custom processes, partners and developers can pass custom field data into Transfer and Callback VoiceCall records. For example, when agents transfer calls to other agents, you can pass attributes like Positive or Neutral for a Customer Sentiment field. Previously, this functionality was available for inbound calls, now it's available for transfers and callbacks too.

### [Create Amazon Connect Instances for Service Cloud Voice with Confidence](#)

Say hello to a smoother setup experience when creating contact centers with Amazon Connect instances. Previously, if an AWS resource failed during the provisioning process, the contact center setup could end up in an inconsistent state, sometimes requiring you to manually revert all changes. Now, the provisioning process is transactional and organized using nested CloudFormation stacks. The process is successful only if all steps succeed. If an AWS resource fails at any point in the process, to avoid inconsistent states, all steps are automatically rolled back, allowing you to restart the process.

### [Fine-Tune After Conversation Work Times for Efficiency](#)

Adjust the amount of time you give agents to wrap up their work after a customer call or messaging session before they start a new one. You can shorten the minimum duration to 10 seconds from 30 seconds. You can also shorten the minimum extension duration to 10 seconds from 15 seconds.

### [Set Up Voice Faster Using an Existing Amazon Connect Instance](#)

To use an existing Amazon Connect instance to create your contact center, you no longer have to perform manual, error-prone steps such as creating and importing the contact center definition XML file. Now, specify a few instance details and you're ready to go.

### [Get the Latest Enhancements for Your Amazon Connect Contact Center](#)

Take advantage of the Service Cloud Voice enhancements and bug fixes for your contact center. Starting with Summer '23, each Salesforce release includes a major contact center update. For example, Summer '23 includes Contact Center version 12.0. These contact center updates are now available in sandbox on a preview instance. To test the updates before they're applied to production, deploy them to your sandbox.

### [Resolve Setup Issues More Quickly with Self-Service Checks \(Beta\)](#)

Get your contact center users up and running more quickly with on-demand diagnostics. No need to troubleshoot or contact Salesforce Customer Support. Run the Single Sign-On service checks to verify that Service Cloud Voice can authenticate all agents and supervisors in your contact center. Run the Contact Center User service checks to verify that every contact center agent and supervisor is assigned the right permission set license and permission set. Without them, the user can't use Service Cloud Voice.

### [Check Voice Channel Performance with More Metrics \(Pilot\)](#)

Evaluate the performance of your voice channel by adding two new Voice objects to your custom report types. Spot trends on disconnected calls, missed calls by agents, call error rates, and other call actions. Some metrics are only available for Service Cloud Voice with Amazon Connect. All data for the new Voice objects are deleted after 30 days.

## Add More AWS Services to Service Cloud Voice with Amazon Connect

Easily add more AWS services to your contact center. The Service Cloud Voice Additional AWS Services add-on license offers more services, such as Amazon Pinpoint, Amazon Connect Voice ID, and Amazon Kinesis Data Firehose. The license also provides full capabilities and access to some of the services you already have, such as Amazon CloudWatch, Amazon Dynamo DB, and Amazon EventBridge. Similar to how Salesforce handles telephony charges, the cost of additional services is passed through a monthly invoice. You can review monthly charges on the Service Cloud Voice Usage and Cost Report.

**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

All models of Service Cloud Voice are available as an add-on license in Service and Sales Clouds.

**How:** Contact your Salesforce account executive to learn about purchasing the Service Cloud Voice Additional AWS Services Add-on license.

SEE ALSO:

[Salesforce Help: Service Cloud Voice Additional AWS Services Add-on License \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Set Up Voice ID \(can be outdated or unavailable during release preview\)](#)

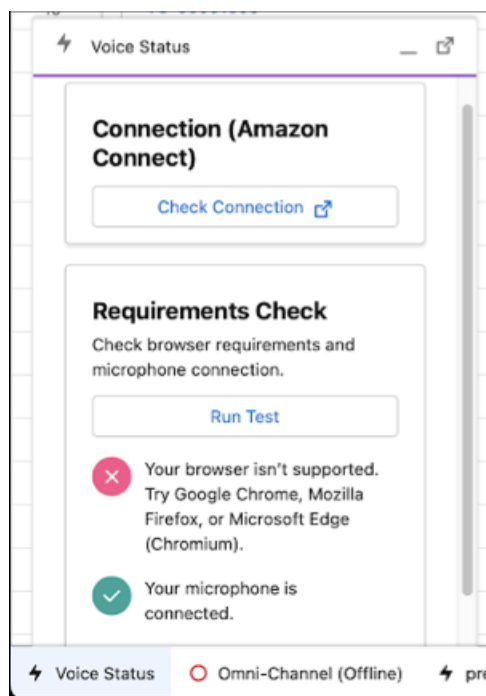
## Get Agents Online Faster with the Voice Status Utility

To help agents check whether their workspace is ready for Service Cloud Voice, add the Voice Status utility to console apps or Voice extensions. When agents click Run Test, their browser and microphone statuses are verified. Additionally, agents using Service Cloud Voice with Amazon Connect run the Amazon Connect Endpoint Test Utility to verify their connection. If verification fails, messages instruct agents how to debug their Voice setup to connect successfully.

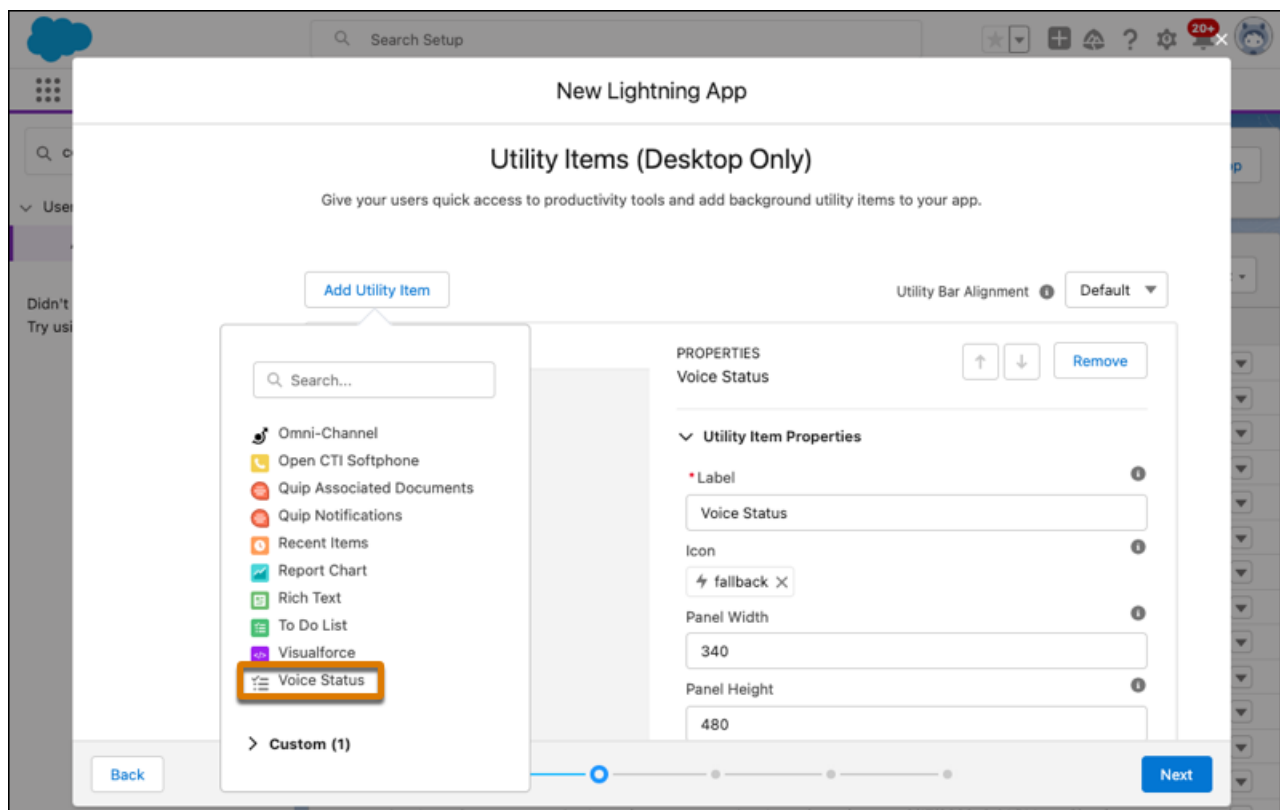
**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions. Available in Salesforce orgs with these [telephony models](#):

- 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.



**How:** To add the Voice Status utility to a Voice extension, use Lightning App Builder to drag Voice Status to your custom Lightning page. To add the Voice Status utility to a console app, from Setup, enter *App* in the Quick Find box, and then select **App Manager**. Edit a utility bar and add Voice Status to the bar from the Utility Items app setting.



SEE ALSO:

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

[Salesforce Help: Set Up the Voice Status Utility for Agents \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Customize Call Controls and Voice Extensions \(can be outdated or unavailable during release preview\)](#)

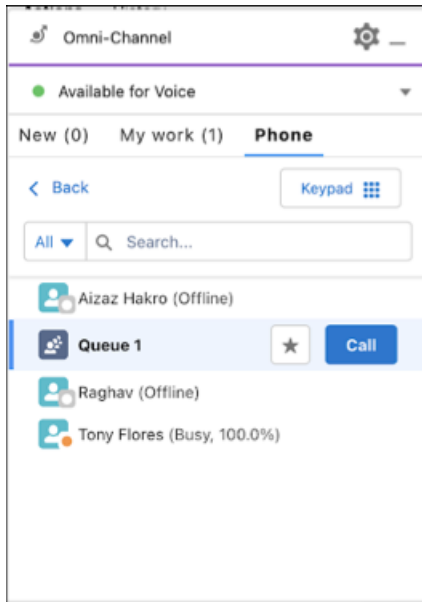
## Make More Calls Faster with Agent-to-Agent Calls

Telephony partners can add a phone book to the Omni-Channel utility to let agents work off speed dial lists and make agent-to-agent or agent-to-queues calls without a Direct Inward Dialing (DID) number.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions. Available in Salesforce orgs with these [telephony models](#):

- Service Cloud Voice with Partner Telephony

All models of Service Cloud Voice are available as an add-on license in Service and Sales Clouds.



SEE ALSO:

[Salesforce Help: Add Callers or Transfer Calls \(can be outdated or unavailable during release preview\)](#)

## Automate Softphone Call Control Events

Replace your manual call actions with automated ones, and even build your own softphone UI using Lightning Web Component or Aura component telephony actions. For example, programmatically send softphone call control events, such as accepting, declining, muting, and merging calls; enabling and disabling call recordings; and sending dual tone multi-frequency (DTMF) digits.

**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.

SEE ALSO:

[Service Cloud Voice Implementation Guide: Service Cloud Voice Aura Toolkit API Telephony Actions \(can be outdated or unavailable during release preview\)](#)

[Service Cloud Voice Implementation Guide: Service Cloud Voice LWC Toolkit API Telephony Actions \(can be outdated or unavailable during release preview\)](#)

## Access Service Cloud Voice with Microsoft Edge (Chromium)

To give you more choices, you can use Service Cloud Voice with the latest stable version of Microsoft Edge (Chromium) browser. Now Voice supports Microsoft Edge (Chromium), Google Chrome, and Mozilla Firefox. To allow single sign-on (SSO), you must enable cookies.

**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.

#### SEE ALSO:

[Salesforce Help: Service Cloud Voice Limits and Limitations \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Supported Browsers and Devices \(can be outdated or unavailable during release preview\)](#)

## Scale Amazon Connect Queue Management with Your Contact Center

When importing Amazon Connect queues into your Salesforce contact center, your import no longer fails due to an Amazon API service limit. We added robust tests to ensure queue imports from Amazon. If you experienced issues importing Amazon Connect queues, try again.

**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.

**Setup** Home Object Manager

Search: amazon contact centers

Feature Settings

- Service
- Voice
- Amazon Contact Centers**

Didn't find what you're looking for? Try using Global Search.

### Import Amazon Connect Routing Configuration

Import Amazon Connect queues, routing profiles, and queue memberships to this Service Cloud Voice contact center. [More Information](#)

**Import**

#### Contact Center Users

Search...

Add Remove Assign to Group

<input type="checkbox"/>	Full Name	Email	Permission Sets	User Profile	Contact Center Group
<input type="checkbox"/>	Dena Ma		Contact Center Agent	System Administrator	Team A
<input type="checkbox"/>	Jonas Brown		Contact Center Admin	System Administrator	Team A

#### Contact Center Queues

Add Remove

<input type="checkbox"/>	Salesforce Queue	Amazon Connect Queue	Created Date	Last Modified By	Last Modified Date
<input type="checkbox"/>	BasicQueue	BasicQueue	7/12/2022, 5:19 PM	Jonas Brown	7/12/2022, 5:19 PM
<input type="checkbox"/>	q1	Queue1	7/12/2022, 5:25 PM	Automated Process	8/1/2022, 9:01 PM

#### Contact Center Groups

Add

<input type="checkbox"/>	Salesforce Group	Salesforce Queues	Last Modified By	Last Modified Date
<input type="checkbox"/>	Team A	q1, hrqueue, BasicQueue	Jonas Brown	7/12/2022, 10:25 PM
<input type="checkbox"/>	Team Green	hrqueue	Jonas Brown	4/20/2022, 9:16 PM
<input type="checkbox"/>	Team Orange		Jonas Brown	4/20/2022, 5:28 AM

#### SEE ALSO:

[Salesforce Help: Import Amazon Connect Queues and Memberships into Your Contact Center \(can be outdated or unavailable during release preview\)](#)

## Show Voice Extensions for Pre- and Post-Call Work

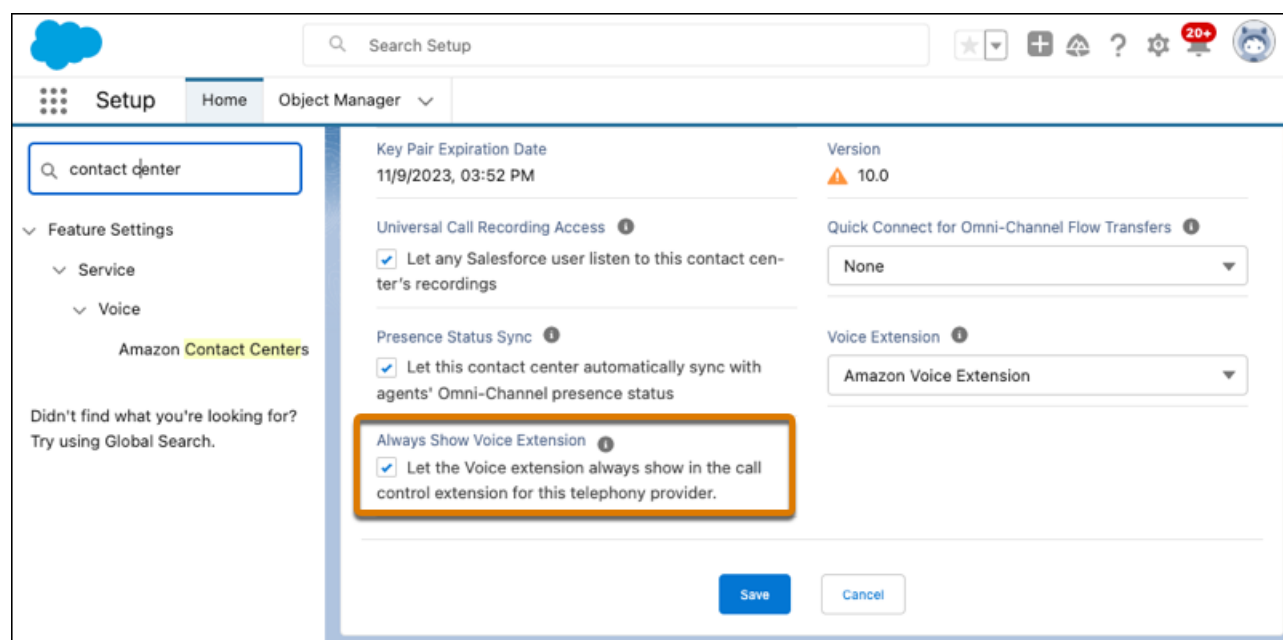
Voice extensions let you build custom user interfaces and agent actions in the Omni-Channel utility. Previously, agents could access Voice extensions only during calls. Now agents can use extensions before, during, and after calls to accomplish more tasks.

**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.

**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, and click Always Show Voice Extension. By default, Always Show Voice Extension is turned off. If your Voice extension isn't updated to support pre- or post-call work, it can show errors or show as empty. Disable your extension until you update it to show properly.



SEE ALSO:

[Salesforce Help: Customize Call Controls and Voice Extensions](#) (can be outdated or unavailable during release preview)

[Developer Guide: Service Cloud Voice Toolkit API](#) (can be outdated or unavailable during release preview)

[Salesforce Help: Lightning App Builder](#) (can be outdated or unavailable during release preview)

## Pass Custom Field Data During Transfers and Callbacks

To support custom processes, partners and developers can pass custom field data into Transfer and Callback VoiceCall records. For example, when agents transfer calls to other agents, you can pass attributes like Positive or Neutral for a Customer Sentiment field. Previously, this functionality was available for inbound calls, now it's available for transfers and callbacks too.

**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.

**How:** From the Object Manager, add custom fields to the Voice Call object. Then copy the name of the generated field, which is automatically prefixed with your Salesforce namespace.

SEE ALSO:

[Service Cloud Voice for Partner Telephony Developer Guide: Use the Demo Connector \(can be outdated or unavailable during release preview\)](#)

[Service Cloud Voice Implementation Guide: Update a Voice Call Record \(can be outdated or unavailable during release preview\)](#)

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

## Create Amazon Connect Instances for Service Cloud Voice with Confidence

Say hello to a smoother setup experience when creating contact centers with Amazon Connect instances. Previously, if an AWS resource failed during the provisioning process, the contact center setup could end up in an inconsistent state, sometimes requiring you to manually revert all changes. Now, the provisioning process is transactional and organized using nested CloudFormation stacks. The process is successful only if all steps succeed. If an AWS resource fails at any point in the process, to avoid inconsistent states, all steps are automatically rolled back, allowing you to restart the process.

**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.

## Fine-Tune After Conversation Work Times for Efficiency

Adjust the amount of time you give agents to wrap up their work after a customer call or messaging session before they start a new one. You can shorten the minimum duration to 10 seconds from 30 seconds. You can also shorten the minimum extension duration to 10 seconds from 15 seconds.

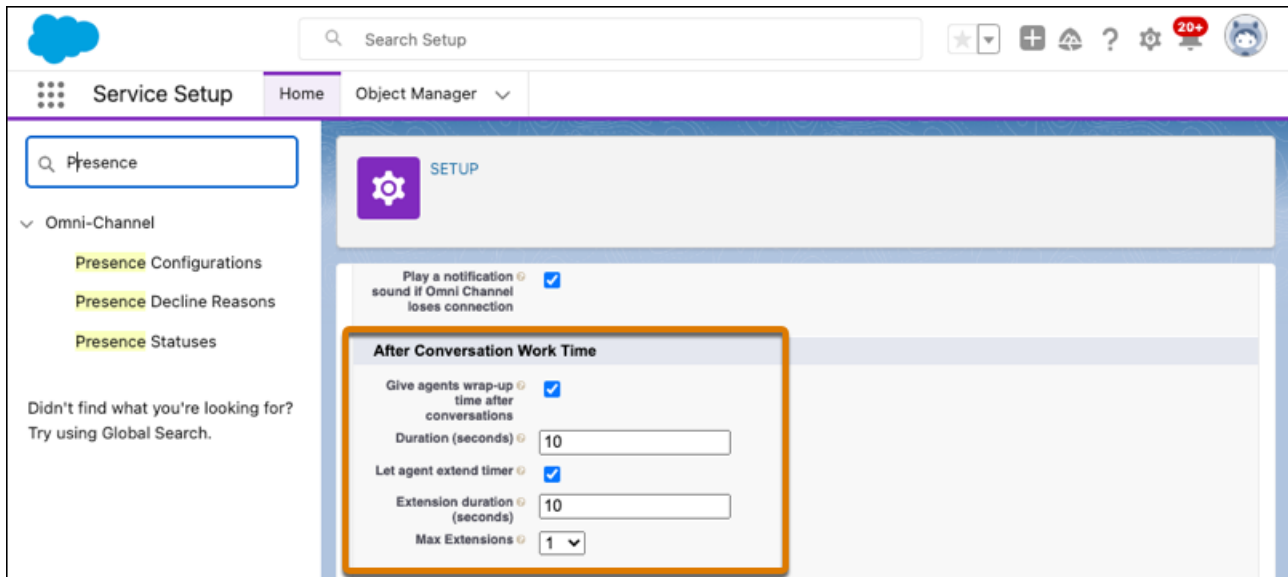
**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions. Available in Salesforce orgs with these [telephony models](#):

- 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.

**How:** You can set up After Conversation Work (ACW) in the presence configuration for a group of agents or in a service channel. ACW at the service channel level overrides the setting at the presence configuration level.





SEE ALSO:

[Salesforce Help: Configure After Conversation Work Time \(can be outdated or unavailable during release preview\)](#)

## Set Up Voice Faster Using an Existing Amazon Connect Instance

To use an existing Amazon Connect instance to create your contact center, you no longer have to perform manual, error-prone steps such as creating and importing the contact center definition XML file. Now, specify a few instance details and you're ready to go.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions. Available in Salesforce orgs with this [telephony model](#):

- Service Cloud Voice with Partner Telephony from Amazon Connect

All models of Service Cloud Voice are available as an add-on license in Service and Sales Clouds.

**How:** When you create the contact center, select **Use an existing Amazon Connect instance by entering the instance details**. After Service Cloud Voice creates a contact center in the existing Amazon Connect instance, import your contact flows to get your contact center up and running.

## New Contact Center

### Let's set up your contact center

☐ (Recommended) Create an Amazon Connect instance  
☒ Use an existing Amazon Connect instance by entering the instance details  
☐ Use an existing Amazon Connect instance by uploading the contact center definition

\* Display Name

\* Internal Name ⓘ

\* Region ⓘ

Region
🔍

\* AWS Instance ID ⓘ

⋮

\* IAM Role ARN ⓘ

AWS Permissions Boundary ARN ⓘ

Next

## SEE ALSO:

[Salesforce Help: Create a Partner Amazon Contact Center \(can be outdated or unavailable during release preview\)](#)

## Get the Latest Enhancements for Your Amazon Connect Contact Center

Take advantage of the Service Cloud Voice enhancements and bug fixes for your contact center. Starting with Summer '23, each Salesforce release includes a major contact center update. For example, Summer '23 includes Contact Center version 12.0. These contact center updates are now available in sandbox on a preview instance. To test the updates before they're applied to production, deploy them to your sandbox.

**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.

## SEE ALSO:

[Knowledge Article: Service Cloud Voice Contact Center Updates \(can be outdated or unavailable during release preview\)](#)

[Knowledge Article: Salesforce Sandbox Preview Instructions \(can be outdated or unavailable during release preview\)](#)


## Resolve Setup Issues More Quickly with Self-Service Checks (Beta)

Get your contact center users up and running more quickly with on-demand diagnostics. No need to troubleshoot or contact Salesforce Customer Support. Run the Single Sign-On service checks to verify that Service Cloud Voice can authenticate all agents and supervisors in your contact center. Run the Contact Center User service checks to verify that every contact center agent and supervisor is assigned the right permission set license and permission set. Without them, the user can't use Service Cloud Voice.

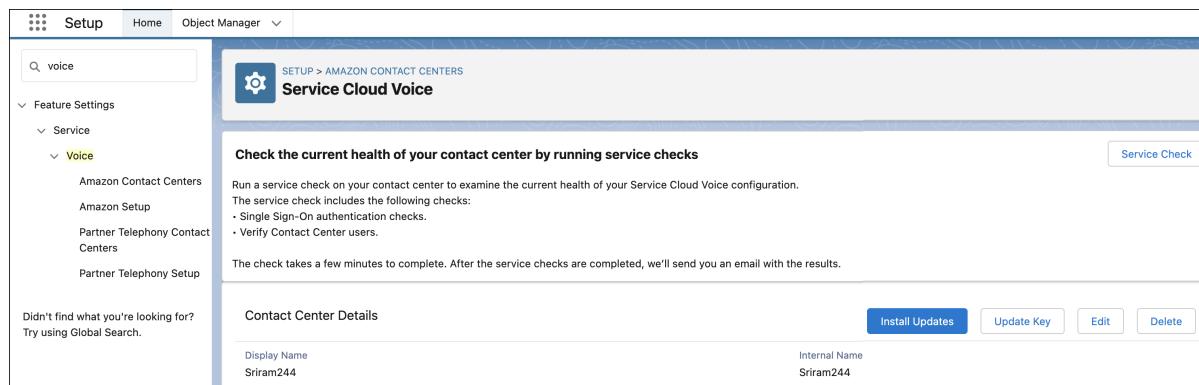
**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions. Available in Salesforce orgs with these [telephony models](#):

- 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.

 **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 run the service checks, click **Service Check** on the contact center details page.



SEE ALSO:

[Salesforce Help: Resolve Setup Issues with Self-Service Checks \(can be outdated or unavailable during release preview\)](#)


## Check Voice Channel Performance with More Metrics (Pilot)

Evaluate the performance of your voice channel by adding two new Voice objects to your custom report types. Spot trends on disconnected calls, missed calls by agents, call error rates, and other call actions. Some metrics are only available for Service Cloud Voice with Amazon Connect. All data for the new Voice objects are deleted after 30 days.

**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.

 **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:** Create a report and select a custom report type that includes the new Voice objects, `VoiceChnlInteractionEvent` and `VoiceChnlInteractionDtlEvent`. Filter Voice fields to see any trends.

Report: SCV Metrics Report  
**Voice Metrics Report**

Total Records  
**37**

	DetailType ↓	Name	Message	Value
1	statusSyncReason	VCIE-000000070	-	Vendor status was offline but
2	error	VCIE-000000049	Could not upsert VoiceCall after several retries, bad value for restricted picklist field: testdemo	UpdateVoiceCallMQHandlerF
3	error	VCIE-000000045	Could not upsert VoiceCall after several retries, bad value for restricted picklist field: testdemo	UpdateVoiceCallMQHandlerF
4	error	VCIE-000000051	Could not upsert VoiceCall after several retries, bad value for restricted picklist field: testdemo	UpdateVoiceCallMQHandlerF
5	error	VCIE-000000063	Could not upsert VoiceCall after several retries, bad value for restricted picklist field: Agriculture	UpdateVoiceCallMQHandlerF
6	error	VCIE-000000055	Could not upsert VoiceCall after several retries, bad value for restricted picklist field: Agriculture	UpdateVoiceCallMQHandlerF
7	error	VCIE-000000059	Could not upsert VoiceCall after several retries, bad value for restricted picklist field: Agriculture	UpdateVoiceCallMQHandlerF
8	error	VCIE-000000060	Could not upsert VoiceCall after several retries, bad value for restricted picklist field: Agriculture	UpdateVoiceCallMQHandlerF
9	disconnectReason	VCIE-000000072	-	CONTACT_FLOW_DISCONNE
10	disconnectReason	VCIE-000000071	-	CONTACT_FLOW_DISCONNE

⚡ previewDialer   ⌚ History   ⚫ Omni-Channel (Offline)

SEE ALSO:

[Salesforce Help: Create a Custom Report Type \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Monitor Your Service Cloud Voice Contact Center \(can be outdated or unavailable during release preview\)](#)

## Channel Tools

Link contacts, employees, leads, and customers to other records with Individual-Object Linking. Modernize your customers' communication experience by adding Messaging for Web to your Channel Menu. And export your conversation transcripts for Voice or Messaging before letting your Salesforce org expire.

IN THIS SECTION:

[Identify the Human Behind the Interaction with Individual-Object Linking \(Beta\)](#)

You asked for more flexibility from the original version of channel-object linking. The feature formerly known as Channel-Object Linking gets a makeover with flows. Individual-Object Linking automatically searches, links, or screen pops records about the person behind an active conversation. This gives agents more insight into who they're messaging with.

### Add Messaging for Web to Your Channel Menu

Upgrade your customer's digital experience by adding a new option to your channel menu. Instead of offering the older Salesforce chat product, let customers choose to engage with you via the more modern Messaging for Web experience.

### Export Messaging and Voice Conversation Transcripts Before You Leave Salesforce

To help you comply with data protection and privacy regulations, you can now export conversation transcripts for Voice, Messaging for In-App and Web, Enhanced Facebook Messenger, and Enhanced WhatsApp after your Salesforce subscription expires.

### Increase Agent Productivity with Automated Actions Using Keyword Detection

Set up no-code automation to trigger real-time actions based on keywords mentioned by customers or agents. For example, if an agent says, "Cancel your subscription," the Service Console automatically shows an Einstein Next Best Action recommendation for the agent to offer a discount. This feature is available with these channels: Voice, Messaging for In-App and Web, Facebook Messenger (enhanced only), and WhatsApp (enhanced only).

### Alert Supervisors and Agents Based on Conversation Intelligence Signals and Keywords

Increase agent efficiency with automated notifications. Set up a rule to trigger real-time supervisor and agent notifications when a condition is met. Previously, agents manually raised a flag to request help from their supervisor. Now you can also set up a rule to automatically get the supervisors' and agents' attention. For example, set up a rule to alert the supervisor when a customer mentions "complaint" or "talk to a supervisor." This feature is available with these channels: Voice, Messaging for In-App and Web, Facebook Messenger (enhanced only), and WhatsApp (enhanced only).

## Identify the Human Behind the Interaction with Individual-Object Linking (Beta)

You asked for more flexibility from the original version of channel-object linking. The feature formerly known as Channel-Object Linking gets a makeover with flows. Individual-Object Linking automatically searches, links, or screen pops records about the person behind an active conversation. This gives agents more insight into who they're messaging with.

**Where:** This change applies to Lightning Experience in:

- Standard Messaging channels, enhanced Messaging channels, and Messaging for In-App and Web. [View required editions.](#)
- Service Cloud Voice channels in Enterprise and Unlimited editions.
- Email-to-Case in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

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

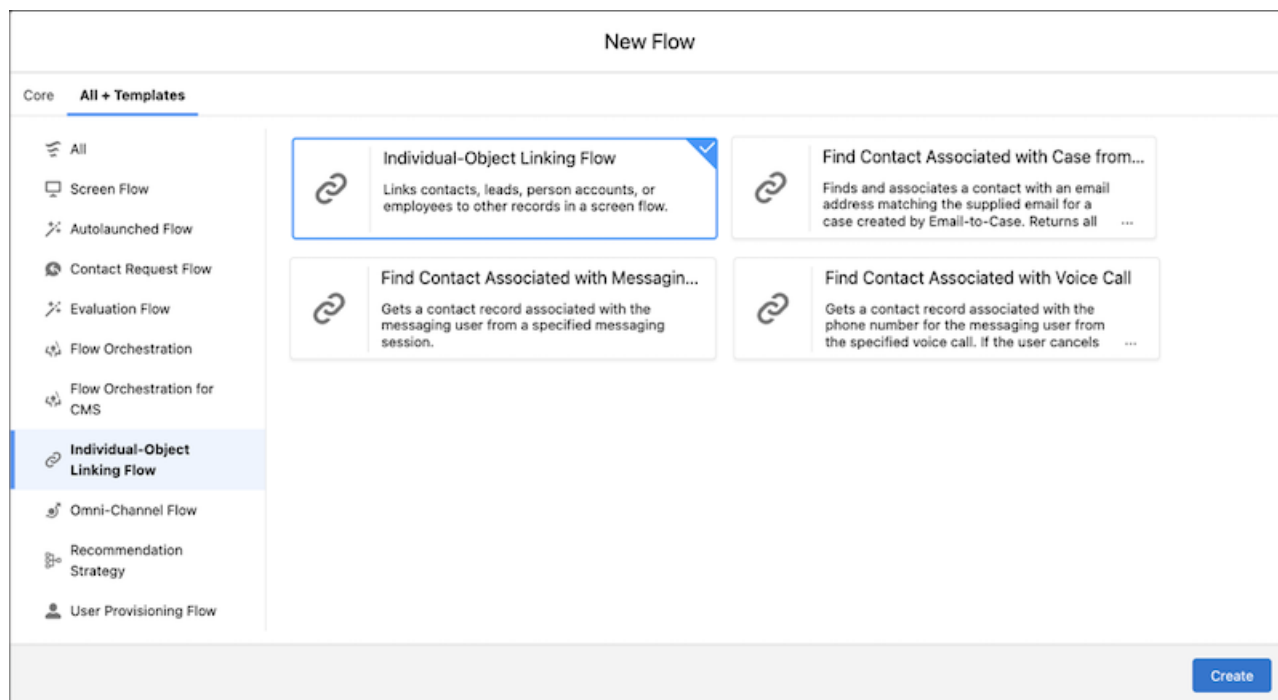
**Who:** To run flows, you need the Run Flows or Manage Flow permissions.

**Why:** We built Individual-Object Linking in Flows so you can:

- Search for an individual (contact, person account, lead, or employee). Channel-Object Linking let you link contacts only.
- Link that individual to any channel or other object. Channel-Object linking let you link to web chat, voice, or standard messaging channel interactions only.
- Run the search automatically or manually from the Actions & Recommendations sidebar.
- Customize your search criteria.
- Manage the scenarios when no, one, or many results are found.
- Search Data Cloud.
- Connect to external data sources to find the required data.

You're welcome to build your own flow based off of the new Search Individual (Beta) flow action that links contacts, leads, employees or person accounts to the interaction record. To make things easier, you can get set up in just a few clicks with three flow templates. The Find Contact Associated with Voice Call template went live in Winter '23. This release, you get the Find Contact Associated with Messaging Session flow template and the Find Contact Associated with Email-to-Case flow template.

**How:** Choose a flow template from the Individual-Object Linking section of All + Templates in Flow Builder. Customize the template to suit your business needs before you activate it.



SEE ALSO:

[Salesforce Help: Individual-Object Linking \(Beta\) \(can be outdated or unavailable during release preview\)](#)

## Add Messaging for Web to Your Channel Menu

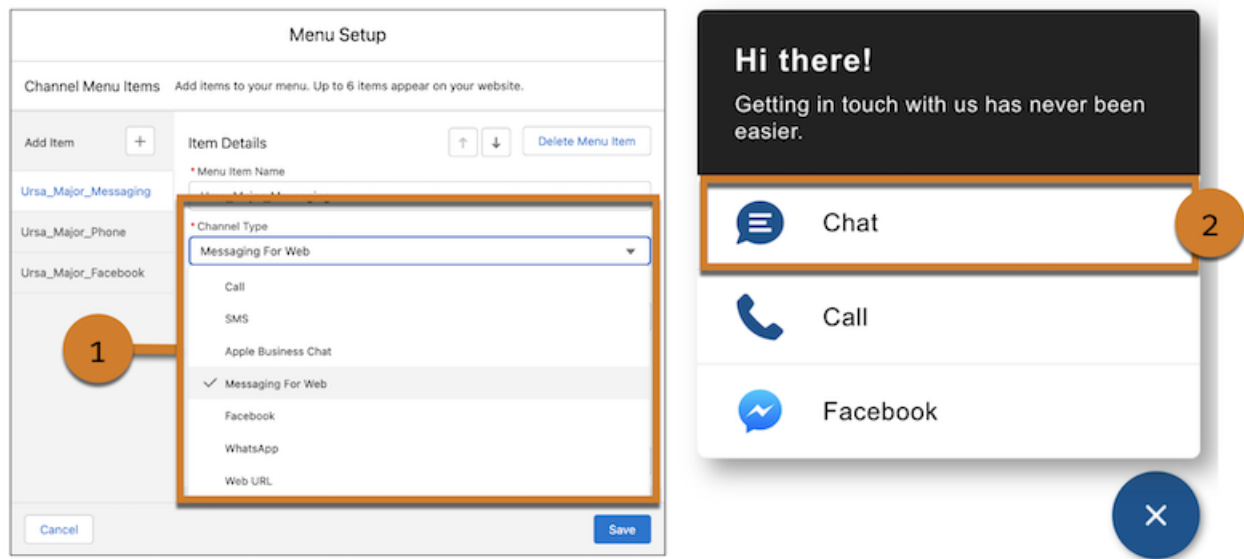
Upgrade your customer's digital experience by adding a new option to your channel menu. Instead of offering the older Salesforce chat product, let customers choose to engage with you via the more modern Messaging for Web experience.

**Where:** This change applies to Messaging for Web. [View required editions.](#)

**Who:** To add Messaging for Web to your Channel Menu, you need the Customize Application permission.

**Why:** Whereas chat conversations are session-based, Messaging for Web conversations can persist across browser tabs or messaging channels (switching between in-app and web), and the conversation history appears beyond one interaction.

**How:** Follow the standard instructions to add a channel to your Channel Menu, and (1) select **Messaging for Web** as the Channel Type. (2) It appears to your customers as Chat.



SEE ALSO:

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

## Export Messaging and Voice Conversation Transcripts Before You Leave Salesforce

To help you comply with data protection and privacy regulations, you can now export conversation transcripts for Voice, Messaging for In-App and Web, Enhanced Facebook Messenger, and Enhanced WhatsApp after your Salesforce subscription expires.

**Where:** This feature is available in:

- Enhanced Voice in Enterprise and Unlimited editions.
- Messaging for In-App and Web, Enhanced WhatsApp Messenger, and Enhanced Facebook Messenger. [View required editions.](#)

**Why:** After you let your Salesforce subscription expire, or after you contact Salesforce Customer Support to cancel it, your org enters a locked status. Now you can contact Salesforce Customer Support to temporarily relieve the locked status in order to export your conversation transcripts. After your org has been locked for 120 days, we delete your data.

**How:** After Salesforce Customer Support changes your org's status, click **Export Now** in the Conversation Transcript Export setup page.

SEE ALSO:

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

## Increase Agent Productivity with Automated Actions Using Keyword Detection

Set up no-code automation to trigger real-time actions based on keywords mentioned by customers or agents. For example, if an agent says, "Cancel your subscription," the Service Console automatically shows an Einstein Next Best Action recommendation for the agent to offer a discount. This feature is available with these channels: Voice, Messaging for In-App and Web, Facebook Messenger (enhanced only), and WhatsApp (enhanced only).

**Where:** This change applies to Lightning Experience in:

- Enterprise, Unlimited, and Developer editions with enhanced Facebook Messenger and enhanced WhatsApp Messaging channels.

- Enterprise, Unlimited, and Performance Editions with Messaging for In-App and Web.
- Enterprise and Unlimited editions with Service Cloud Voice for 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:** Create the rule and specify the exact keyword to match in each utterance. You can enter up to 25 keywords, where each keyword has a 255-character limit. Punctuation isn't supported in keywords.

### Create Rule

Create a rule for conversations that occur in the selected service channel instance. For the rule, select the action to perform when a Conversation Intelligence signal from the specified intelligence source is detected.

☒ Active ⓘ

\* Rule Label ⓘ  
Show NBA if Customer Wants to Cancel Subscription

\* Developer Name ⓘ  
Show\_NBA\_if\_Customer\_Wants\_to\_Cancel\_Subscription

\* Action ⓘ  
Update Next Best Action ▼

\* Service Channel Instance ⓘ  
AmazonResellOregon ▼

\* Trigger Type  
☒ Matching keyword  
☐ Signals from an intelligence source

\* Detect keywords mentioned by: ⓘ  
Agent ▼

1	Cancel your subscription	<input type="button" value="X"/>
---	--------------------------	----------------------------------

Save



During the conversation between a caller and an agent, Conversation Intelligence detects each keyword in real time, using exact matching, not pattern matching. The matching algorithm ignores punctuation in utterances.

SEE ALSO:

[Salesforce Help: Create a Conversation Intelligence Rule to Trigger an Action \(can be outdated or unavailable during release preview\)](#)

## Alert Supervisors and Agents Based on Conversation Intelligence Signals and Keywords

Increase agent efficiency with automated notifications. Set up a rule to trigger real-time supervisor and agent notifications when a condition is met. Previously, agents manually raised a flag to request help from their supervisor. Now you can also set up a rule to automatically get the supervisors' and agents' attention. For example, set up a rule to alert the supervisor when a customer mentions "complaint" or "talk to a supervisor." This feature is available with these channels: Voice, Messaging for In-App and Web, Facebook Messenger (enhanced only), and WhatsApp (enhanced only).

**Where:** This change applies to Lightning Experience in:

- Enterprise, Unlimited, and Developer editions with enhanced Facebook Messenger and enhanced WhatsApp Messaging channels.
- Enterprise, Unlimited, and Performance Editions with Messaging for In-App and Web.
- Enterprise and Unlimited editions with Service Cloud Voice for these [telephony models](#):
  - Service Cloud Voice with Amazon Connect
  - Service Cloud Voice with Partner Telephony
  - Service Cloud Voice with Partner Telephony from Amazon Connect

**How:** When you create a rule, select the **Alert Supervisor** action to notify only the supervisor or **Alert Agent and Supervisor** to notify both of them.

### Create Rule

Create a rule for conversations that occur in the selected service channel instance. For the rule, select the action to perform when a Conversation Intelligence signal from the specified intelligence source is detected.

☒ Active ⓘ

\* Rule Label ⓘ  
Alert Supervisor and Agent

\* Developer Name ⓘ  
Alert\_Supervisor\_and\_Agent

\* Action ⓘ  
Alert the Supervisor and the Agent ▼

\* Service Channel Instance ⓘ  
AmazonResellOregon ▼

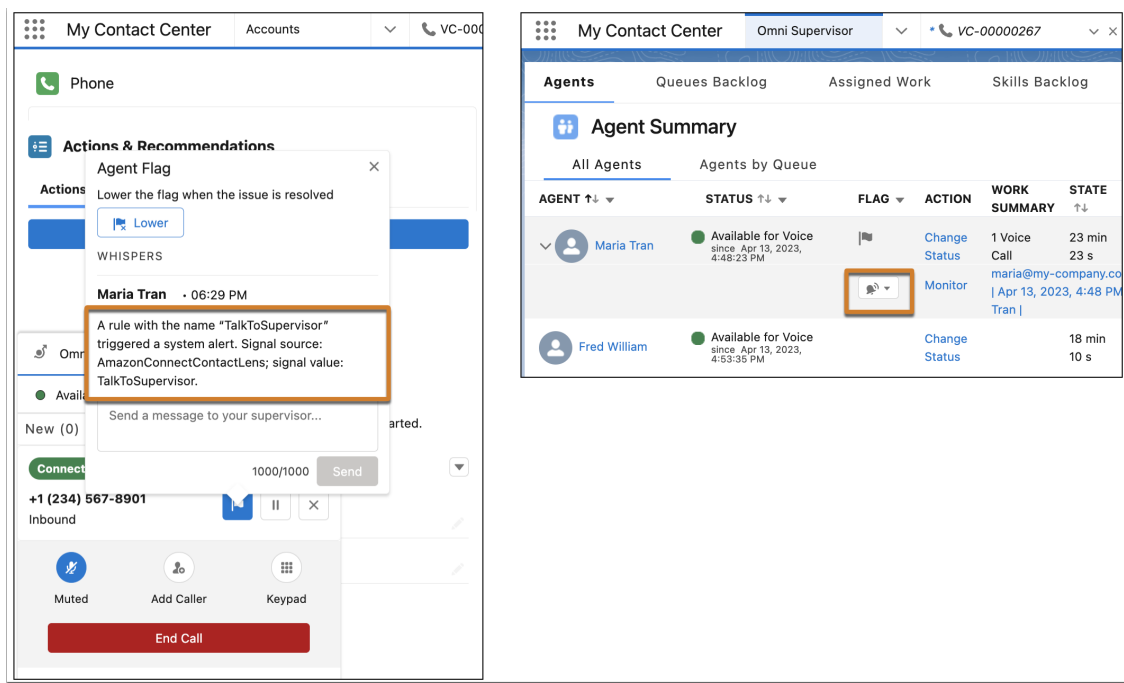
\* Trigger Type  
☒ Matching keyword  
☐ Signals from an intelligence source

\* Detect keywords mentioned by: ⓘ  
Customer ▼

1	talk to a supervisor	×
2	complaint	×

Save

When the rule triggers, a flag raises in the Omni widget for the agent and Omni Supervisor for the supervisor. To view the alert message, they can click the flag.



SEE ALSO:  
[Salesforce Help: Create a Conversation Intelligence Rule to Trigger an Action \(can be outdated or unavailable during release preview\)](#)

## 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 reduce swivel chair pains. Collaborate in Salesforce with the look, feel, and fun of Slack. Apply the power of swarming and cross-functional experts in Field Service. And start swarming faster with other enhancements.

### IN THIS SECTION:

[Get the Enhanced Slack Conversations Experience](#)

Collaborate on a Slack swarm from Lightning Experience with the enhanced Slack Conversations component that looks and feels more like Slack. To keep the experience consistent between Slack and Salesforce, Slack profile pictures now appear alongside the message, messages are left-aligned and timestamped, and users can see and send custom Slack emojis. Slack Conversations users can also view advanced Slack formats such as code and code blocks, easily identify attachments by a file emoji, send messages through Slack Connect, and even use the component on the go from a tablet.

[Extend Swarming to Field Service Workers](#)

Bring the power of Swarming and Expert Finder to Field Service with Service Appointments, now supported for Swarming. Field service workers can bring together cross-functional experts to quickly resolve tricky customer issues, even when onsite with a customer, helping reduce your cost to serve.

[See Slack Channel Names in Swarming Reports](#)

To help users more easily identify swarm channels and their purposes in a report or list view, Slack channel names associated with a swarm are now shown in the Collaboration Room field. This change applies to all new swarm records created after Summer '23 and is enabled by default. Previously, the Collaboration Room field showed a Collaboration Room ID.

### Start a Swarm Faster with Searchable Slack Channels

Speed up your time to close and make it easier for agents to find the right swarm channel with searchable Slack channel names. Now when an agent starts a swarm in a channel, they can easily search for keywords. Previously, agents scrolled through a picklist of available channels to find the one they needed.

### Catch Up on Service Cloud for Slack App Features

Use the Service Cloud for Slack app to attach knowledge article drafts to Salesforce records, more easily create Salesforce records from Slack, and more.

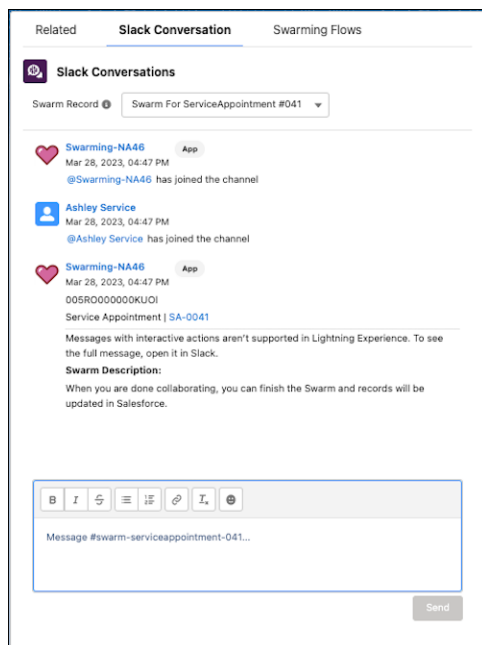
## Get the Enhanced Slack Conversations Experience

Collaborate on a Slack swarm from Lightning Experience with the enhanced Slack Conversations component that looks and feels more like Slack. To keep the experience consistent between Slack and Salesforce, Slack profile pictures now appear alongside the message, messages are left-aligned and timestamped, and users can see and send custom Slack emojis. Slack Conversations users can also view advanced Slack formats such as code and code blocks, easily identify attachments by a file emoji, send messages through Slack Connect, and even use the component on the go from a tablet.

**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.

**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.

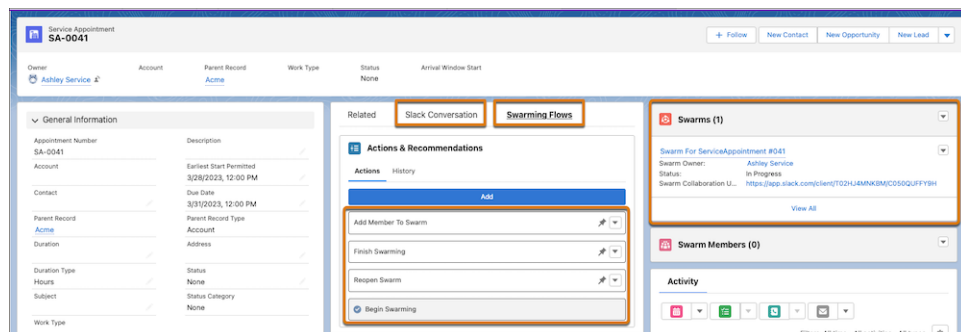


## Extend Swarming to Field Service Workers

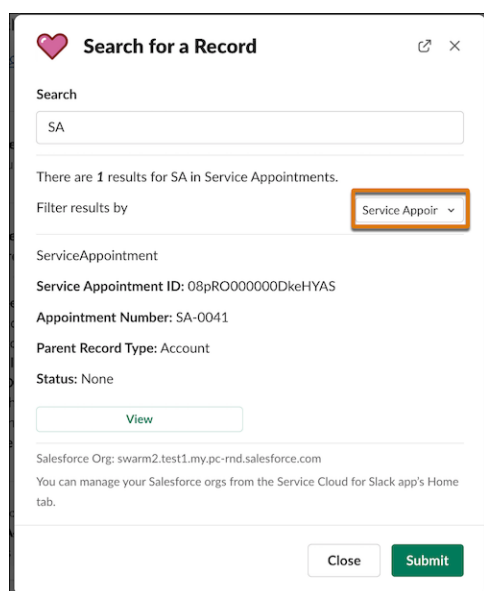
Bring the power of Swarming and Expert Finder to Field Service with Service Appointments, now supported for Swarming. Field service workers can bring together cross-functional experts to quickly resolve tricky customer issues, even when onsite with a customer, helping reduce your cost to serve.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions with the Field Service managed package installed.

**How:** Field service workers can start a swarm from a service appointment in Lightning Experience or from a Slack channel with the /service-swarm-start slash command.



Field service workers can also easily search for a service appointment record in a Slack channel to get the full context of the appointment with the /service-search slash command and Service Appointments filter.

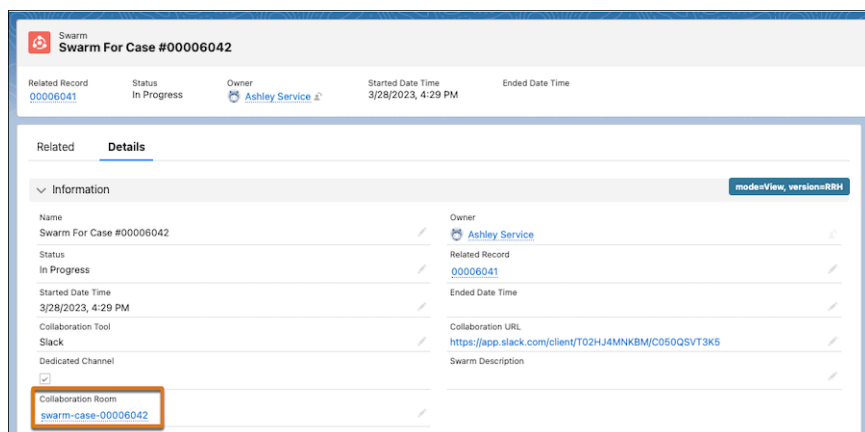


## See Slack Channel Names in Swarming Reports

To help users more easily identify swarm channels and their purposes in a report or list view, Slack channel names associated with a swarm are now shown in the Collaboration Room field. This change applies to all new swarm records created after Summer '23 and is enabled by default. Previously, the Collaboration Room field showed a Collaboration Room ID.

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

**How:** Users with access to a swarm record can see the swarm's Slack channel name from the Collaboration Room field. If the Slack channel name contains sensitive information, consider changing the name in Slack or updating the Collaboration Room field after the swarm record is created.

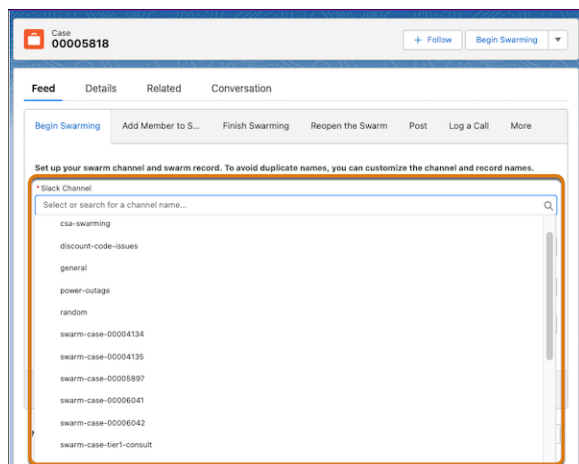


## Start a Swarm Faster with Searchable Slack Channels

Speed up your time to close and make it easier for agents to find the right swarm channel with searchable Slack channel names. Now when an agent starts a swarm in a channel, they can easily search for keywords. Previously, agents scrolled through a picklist of available channels to find the one they needed.

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

**How:** From the Begin Swarming flow in Lightning Experience, search for a Slack channel name.



## Catch Up on Service Cloud for Slack App Features

Use the Service Cloud for Slack app to attach knowledge article drafts to Salesforce records, more easily create Salesforce records from Slack, and more.

See the release notes for the latest updates: [Service Cloud for Slack App Release Notes](#).

## Customer Service Incident Management

Communicate with internal stakeholders more effectively with enhanced broadcast alerts and broadcast Slack messages. Keep your incidents centralized and easily accessible to incident teams with the new Incident Alerts All tab. And with custom templates for broadcast Slack messages, your teams can remain efficient while delivering proactive incident updates that are tailored to your business.

### IN THIS SECTION:

#### [Stay on Top of Incidents with the Enhanced Incident Alerts Utility](#)

Increase incident visibility from anywhere in Salesforce with the new All tab in the Incident Alerts utility. Now incident teams see all incidents from one place, including the newest incidents, while keeping the context of the Salesforce record. And, to reduce context switching, incident teams can use the default list view to edit, delete, or attach the incident to a case without leaving the Incident Alerts utility.

#### [Send Custom Incident Updates with Broadcast Slack Message Templates](#)

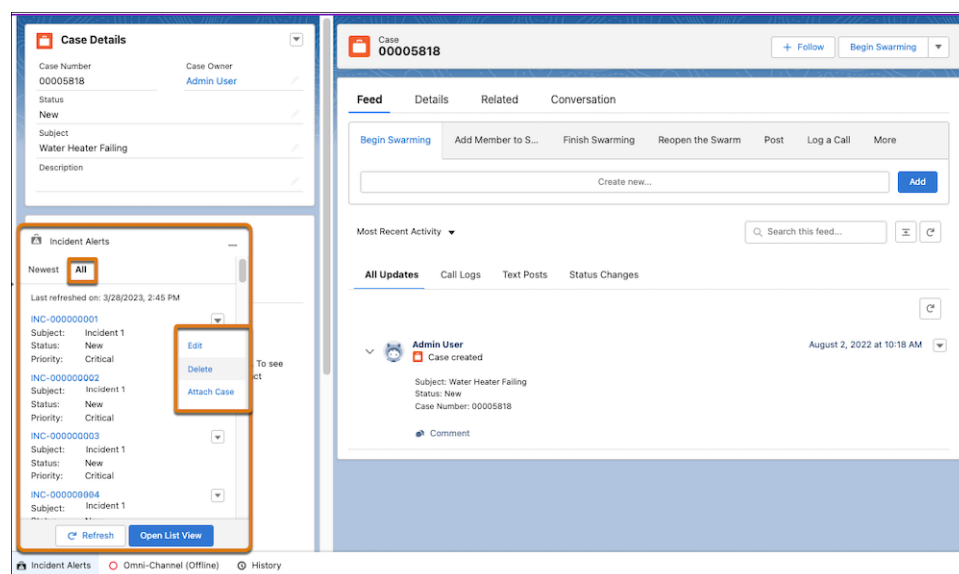
Send mass communications that are customized to your business needs to internal stakeholders and relevant teams in Slack. Incident managers can configure custom templates complete with merge fields so that broadcast Slack messages are tailored to the audience and save incident teams time. For example, use broadcast templates to send different broadcast Slack messages for hardware and software incidents.

## Stay on Top of Incidents with the Enhanced Incident Alerts Utility

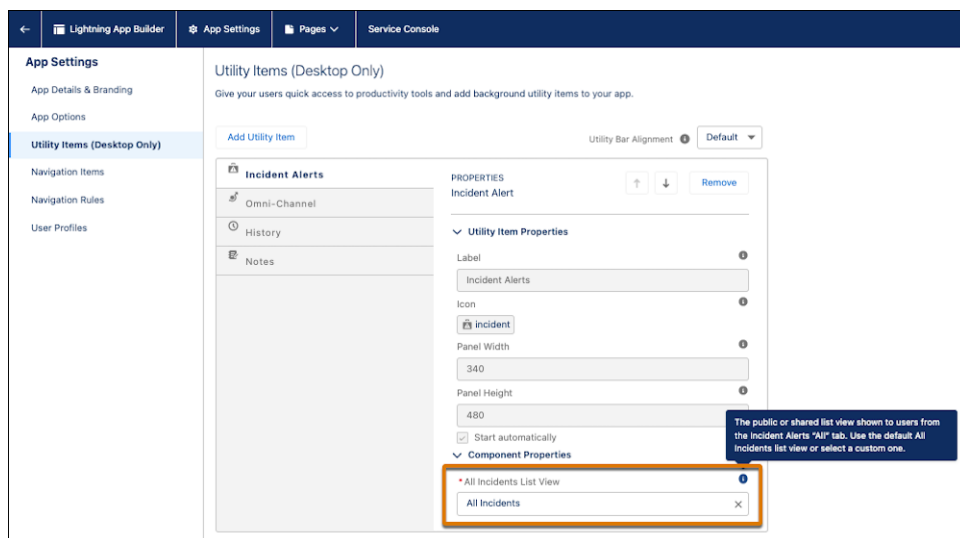
Increase incident visibility from anywhere in Salesforce with the new All tab in the Incident Alerts utility. Now incident teams see all incidents from one place, including the newest incidents, while keeping the context of the Salesforce record. And, to reduce context switching, incident teams can use the default list view to edit, delete, or attach the incident to a case without leaving the Incident Alerts utility.

**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 alerts.



By default, the All Incidents list view is shown in the All tab. To show a different list view, edit the All Incidents list view filters or add a custom list view from the Incident Alerts utility settings in Lightning App Builder.



SEE ALSO:

[Salesforce Help: Customize the Incident Alerts All Tab \(can be outdated or unavailable during release preview\)](#)

## Send Custom Incident Updates with Broadcast Slack Message Templates

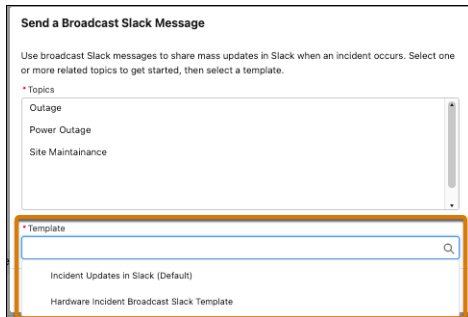
Send mass communications that are customized to your business needs to internal stakeholders and relevant teams in Slack. Incident managers can configure custom templates complete with merge fields so that broadcast Slack messages are tailored to the audience and save incident teams time. For example, use broadcast templates to send different broadcast Slack messages for hardware and software incidents.

**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. Then, to create a broadcast Slack message template, create a custom Slack notification for the Incident object and set the distribution app to Service Cloud for Slack.

An incident team member can select which template to use when they create a broadcast Slack message. By default, the template is set to Incident Updates in Slack (Default).





SEE ALSO:

[Salesforce Help: Create a Custom Broadcast Slack Message Template \(can be outdated or unavailable during release preview\)](#)

## Routing

Join the ongoing Omni-Channel pilot programs. The Omni Supervisor wallboard (pilot) shows more metrics and supervisors can focus on metrics for a queue.

### IN THIS SECTION:

#### [Monitor Contact Center Health in the Omni Supervisor Wallboard \(Pilot\)](#)

Show supervisors real-time metrics to help them identify and resolve issues quickly. In this continuing pilot, the wallboard includes more charts. On the Omni Supervisor tab, supervisors can select a queue of interest to filter the metrics shown.

#### [Route Work Orders to Field Service Workers](#)

Use Omni-Channel routing to direct work orders to the appropriate field service teams and technicians. Apply business routing rules or Omni-Channel flows to identify the best candidates for the work.

#### [Get Supervisors Involved Fast with Conversation Intelligence](#)

When conversation intelligence detects a key phrase in calls or messages, it raises a flag on the Agents tab in Omni Supervisor. Supervisors can then jump in and help agents resolve the issue quickly.

## Monitor Contact Center Health in the Omni Supervisor Wallboard (Pilot)

Show supervisors real-time metrics to help them identify and resolve issues quickly. In this continuing pilot, the wallboard includes more charts. On the Omni Supervisor tab, supervisors can select a queue of interest to filter the metrics shown.

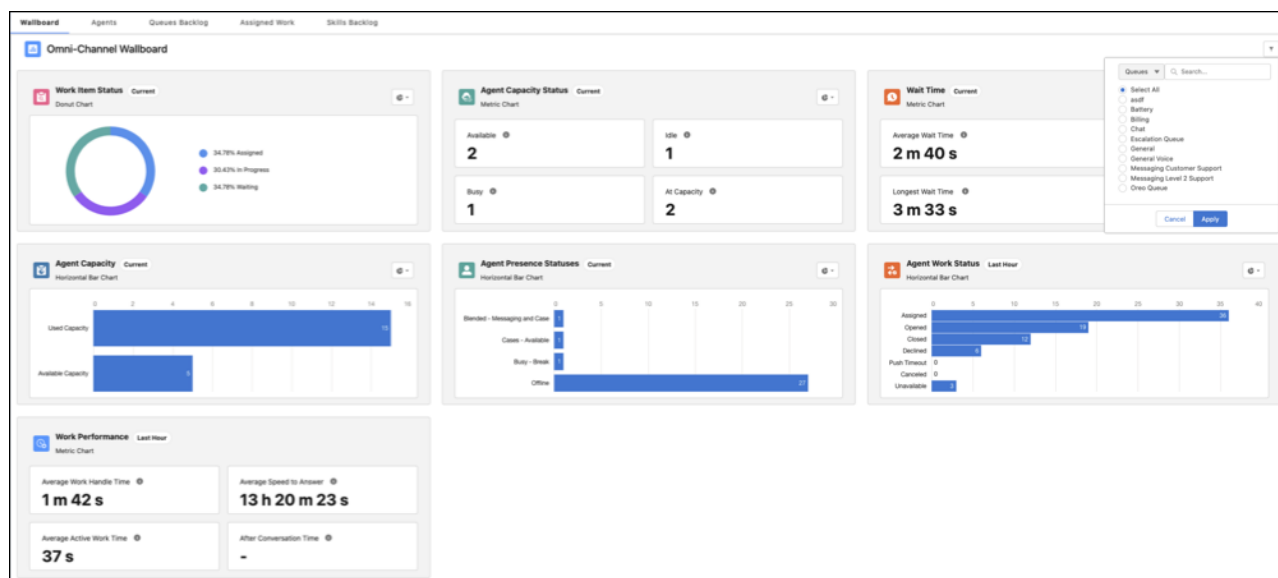
**Where:** This change applies to Lightning Experience in Professional, Enterprise, Performance, Unlimited, and Developer editions.



**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, open the Wallboard tab and optionally select a queue. Wallboard charts show agent work statuses, handle times, average speed to answer time, average active work time, and after conversation work times for the last hour. Supervisors also see metrics about current work item status, maximum wait times, agent capacity statuses, and used and available capacity. The wallboard excludes work that's routed using skills-based routing.



## Route Work Orders to Field Service Workers

Use Omni-Channel routing to direct work orders to the appropriate field service teams and technicians. Apply business routing rules or Omni-Channel flows to identify the best candidates for the work.

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

## Get Supervisors Involved Fast with Conversation Intelligence

When conversation intelligence detects a key phrase in calls or messages, it raises a flag on the Agents tab in Omni Supervisor. Supervisors can then jump in and help agents resolve the issue quickly.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions. Available in Salesforce orgs that use conversation intelligence.

**How:** Set up conversation intelligence rules to raise a flag to engage your supervisors. When the rule triggers a flag raise, the supervisor sees an alert in the flag column in the Agents tab.

Agents

Queues Backlog

Assigned Work

Skills Backlog

Agent Summary

All Agents

Agents by Queue

<input type="checkbox"/>	AGENT <span>↑↓</span>	STATUS <span>↑↓</span>	FLAG <span>▼</span>	ACTION	WORK SUMMARY	STATE <span>↑↓</span>	LOGIN <span>↑↓</span>	ACCEPT <span>↑↓</span>	ACW	WORKLOAD <span>↑↓</span>	CHANNELS <span>▼</span>
<input type="checkbox"/>	Astro Service	Offline since --				--	--	--		0 / 5	
<input type="checkbox"/>	Blaze Service	Offline since --				--	--	--		0 / 5	
<input type="checkbox"/>	Cloudy Service	Offline since --				--	--	--		0 / 5	
<input type="checkbox"/>	Cody Service	Offline since --				--	--	--		0 / 5	
<input type="checkbox"/>	>  Craig Service	Available since Apr 10, 2023 7:42:19 AM		Change Status	6 Cases	24 s	24 s	--		1 / 8	
<input type="checkbox"/>	Einstein Service	Offline since --				--	--	--		0 / 5	

SEE ALSO:

- [Alert Supervisors and Agents Based on Conversation Intelligence Signals and Keywords](#)
- [Salesforce Help: Support and Train Your Agents \(can be outdated or unavailable during release preview\)](#)
- [Salesforce Help: Reduce Agent Handling Time with Conversation Intelligence \(can be outdated or unavailable during release preview\)](#)

Knowledge

Author articles easily and more effectively and optimize agent interaction with knowledge articles by controlling content visibility, create a more granular publishing schedule for knowledge articles, simplify your knowledge article maintenance and review process, grow your knowledge base with confidence, and expose Knowledge records in the Lightning Web Runtime.

IN THIS SECTION:

- [Enable Lightning Article Editor and Article Personalization for Knowledge \(Beta\) \(Release Update\)](#)  
Unlock a richer and more user-friendly experience with the new Lightning Article Editor. And with Article Personalization, your knowledge content is tailored to your business needs and unlocks agent productivity.
- [Run the Lightning Knowledge Migration Tool](#)  
Get the latest Knowledge features when you migrate from Knowledge Classic to Lightning Knowledge, like Einstein Article Recommendations, Einstein Search for Knowledge, Flow support, and bots. The Classic Knowledge data model retirement phase is in progress. To prepare for this retirement and take advantage of updated features, run the Lightning Knowledge Migration Tool. After running the Lightning Knowledge Migration Tool, you can still use Classic Knowledge in the Classic UI. We aren't retiring the Classic UI for Knowledge.
- [Grow Your Knowledge Base and Handle Complex Hierarchies with Confidence](#)  
Get increased default limits for the number of knowledge articles and data categories per data category group. Grow your knowledge base when more support scenarios arise, and categorize and filter articles for products with complex hierarchies or taxonomies.
- [Set Knowledge Article Review Dates with the Next Review Date Field](#)  
Simplify the process for reviewing knowledge articles and ensure article content is up-to-date and relevant with the new Next Review Date field. The field is also usable by out-of-the-box CRM Analytics reporting packs. Previously, Salesforce admins used a custom Next Review Date field and a flow to manage reviews and maintenance of the article.

### [Schedule a Knowledge Article to Publish at a Specific Time](#)

Knowledge article authors and knowledge managers can publish articles in 15-minute intervals to better address the targeted nature of certain types of communications. For example, if you release a new update to your app, you can select a publishing time so that the knowledge article announcing the update gets published as close as possible to the time that the update goes live. Previously, you could schedule article publication only on a certain date.

### [Insert Knowledge Articles Quickly on LWR Sites](#)

Help users self-serve and find solutions quickly with the new Knowledge Article page for LWR sites. Now you can add knowledge articles to your Self-Service portal's Knowledge Article Details page.

## Enable Lightning Article Editor and Article Personalization for Knowledge (Beta) (Release Update)

Unlock a richer and more user-friendly experience with the new Lightning Article Editor. And with Article Personalization, your knowledge content is tailored to your business needs and unlocks agent productivity.

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



**Note:** This feature is a Beta Service. Users may opt to use the Beta Service and are subject to the applicable terms provided at [Agreements and Terms](#).

**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:** With the Lightning Article Editor, you can:


- Boost author productivity with an easily accessible collection of content formatting capabilities and advanced table editing.
- Size the editor to your liking (including full screen mode) to author articles more effectively and to better understand how the articles look to the end user.
- Copy and paste content seamlessly from external sources, such as Google Docs or websites, while maintaining the look and feel of the original source content.
- Ensure your articles follow W3C accessibility standards using the built-in accessibility checker tool.

With Article Personalization, you can create custom visibility rules that hide or show fields based on the user, user permissions, and record. Salesforce admins customize knowledge articles by controlling which parts of an article are shown or hidden from specific audiences. And service agents interacting with the content find answers faster because they see only what they need to see.

**How:** To enable the Lightning Article Editor and Article Personalization for Knowledge, go to Release Updates in Setup, find the update, and get started.

### Enable Lightning Article Editor and Article Personalization for Knowledge (Beta)

 COMPLETE STEPS BY: JAN 10, 2024 


TEST RUN SUPPORTED 

Unlock a richer and more user-friendly experience with the new Lightning Article Editor. And with Article Personalization, your knowledge content is tailored to your business needs and unlocks agent productivity....

USABILITY

0%

0 of 2



Enforcement Scheduled: Spring '24 


[View Details](#)




[Get Started](#)







After you enable the release update, the new Lightning Article Editor replaces the old Knowledge editor.





File Edit Insert View Format Table Tools Help



















Paragraph 





















**B** *I* U   





















 












The shipping vendor either lost the package in transit, or encountered a delay.

p

13 words 

#### SEE ALSO:

[Release Updates](#)

[Salesforce Help: Manage Release Updates](#)

[Salesforce Help: Lightning Article Editor \(Beta\)](#)

[Salesforce Help: Article Personalization for Knowledge \(Beta\)](#)

[Manage Release Updates](#)

## Run the Lightning Knowledge Migration Tool

Get the latest Knowledge features when you migrate from Knowledge Classic to Lightning Knowledge, like Einstein Article Recommendations, Einstein Search for Knowledge, Flow support, and bots. The Classic Knowledge data model retirement phase is in progress. To prepare for this retirement and take advantage of updated features, run the Lightning Knowledge Migration Tool. After running the Lightning Knowledge Migration Tool, you can still use Classic Knowledge in the Classic UI. We aren't retiring the Classic UI for Knowledge.

**When:** Salesforce enforces this update on June 1, 2025.

**Who:** This change applies to all Salesforce customers using Classic Knowledge.

**Why:** The Classic Knowledge data model is no longer available starting with the Summer '25 release. Recent updates and features replace and improve the Classic data model. After you run the Lightning Knowledge Migration Tool, you can take advantage of these Knowledge improvements. You can still use Lightning Knowledge in Salesforce Classic, even after the update.

**How:** Run the Lightning Knowledge Migration Tool before the deadline to migrate to the Lightning Knowledge data model. [Learn How to Migrate in Help](#)

After the migration tool is run, Lightning Knowledge works the following ways in Salesforce Classic:

- Because Lightning Knowledge uses record types instead of article types, you can no longer filter by article type.
- You can't set a default record type in Salesforce Classic.
- Some actions, such as Change Record Type, aren't available from the knowledge article record page in Salesforce Classic.
- Picklist values assigned to one record type in Knowledge aren't visible on records in Salesforce Classic.
- If you have custom solutions for your Classic Knowledge implementation, such as Visualforce components or pages, refactoring them to work with the Lightning Knowledge data model is sometimes required. Especially if your custom solution relies on article types, refactor it to work with record types. Use a sandbox to test your custom solutions before running the migration tool in production.

SEE ALSO:

[Trailhead: Lightning Knowledge Migration](#)

[Salesforce Help: Custom Lightning Page Components](#)

## Grow Your Knowledge Base and Handle Complex Hierarchies with Confidence

Get increased default limits for the number of knowledge articles and data categories per data category group. Grow your knowledge base when more support scenarios arise, and categorize and filter articles for products with complex hierarchies or taxonomies.

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

**How:** To find out whether the increased limits for knowledge articles and data categories meet your business needs, log a case with the Feature Activations & Limit Team to increase the limits.

## Set Knowledge Article Review Dates with the Next Review Date Field

Simplify the process for reviewing knowledge articles and ensure article content is up-to-date and relevant with the new Next Review Date field. The field is also usable by out-of-the-box CRM Analytics reporting packs. Previously, Salesforce admins used a custom Next Review Date field and a flow to manage reviews and maintenance of the article.

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

**How:** The new date field exists on the KnowledgeArticleVersion object and the standard object Knowledge\_\_kav. You can fill in the field manually or through your own flow Apex class.

SEE ALSO:

[Developer Documentation: KnowledgeArticleVersion](#)

[Developer Documentation: Knowledge\\_\\_kav](#)

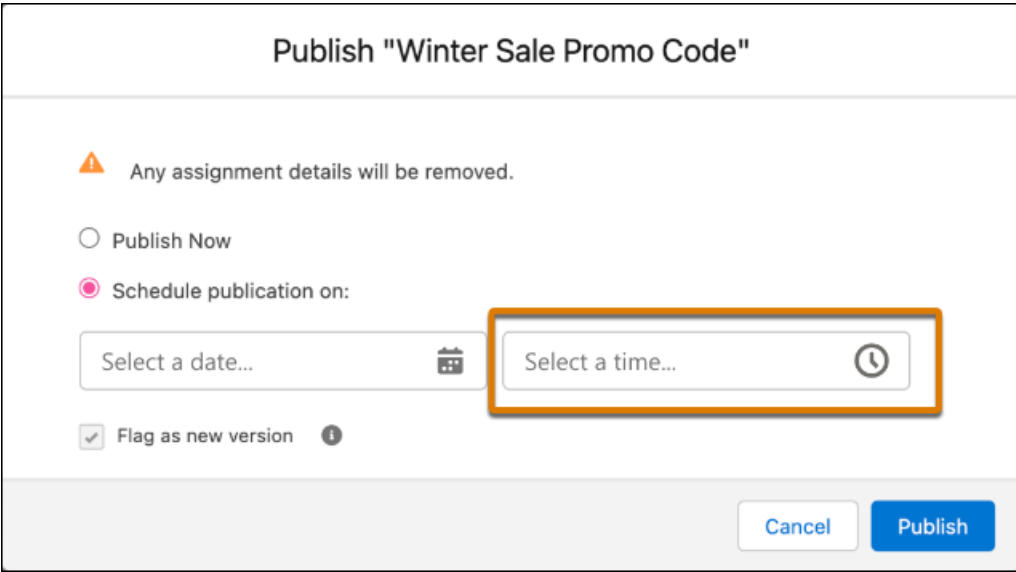
[Salesforce Help: Fields Available on Salesforce Knowledge Reports](#)

## Schedule a Knowledge Article to Publish at a Specific Time

Knowledge article authors and knowledge managers can publish articles in 15-minute intervals to better address the targeted nature of certain types of communications. For example, if you release a new update to your app, you can select a publishing time so that the knowledge article announcing the update gets published as close as possible to the time that the update goes live. Previously, you could schedule article publication only on a certain date.

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

**How:** Select a publication time for a knowledge article.





**Publish "Winter Sale Promo Code"**


⚠ Any assignment details will be removed.

☐ Publish Now

☒ Schedule publication on:

Select a date... 

**Select a time...** 

☒ Flag as new version 

SEE ALSO:

[Salesforce Help: Publish Articles and Translations](#)

[Developer Documentation: Publish the Primary Version of an Article](#)

## Insert Knowledge Articles Quickly on LWR Sites

Help users self-serve and find solutions quickly with the new Knowledge Article page for LWR sites. Now you can add knowledge articles to your Self-Service portal's Knowledge Article Details page.

**Where:** This change applies to LWR sites accessed through Lightning Experience, and Salesforce Classic in Enterprise and Unlimited editions.

SEE ALSO:

[Add Knowledge Pages to Your Enhanced LWR Site](#)

[Salesforce Help: Set Up Knowledge for Enhanced LWR Sites](#)

## Cases

In Email-to-Case, get an updated and feature-rich HTML text editor when you switch to the Lightning editor (beta) in the docked and case feed email composers. Make your agents more productive with a flow template that finds and links contacts to your cases.

IN THIS SECTION:

[Transition to the Lightning Editor for Email Composers in Email-to-Case \(Beta\) \(Release Update\)](#)

When enabled, this release update replaces the email editor in the docked and case feed email composers. Available in Lightning Experience as a beta feature, the Lightning editor provides an updated user interface and other new features: full-screen mode, the ability to print from the menu, undo and redo buttons, and smart copy-paste. It also complies with Salesforce security standards.

[Save Time by Linking Contacts to Cases in Email-to-Case](#)

Add a flow that puts customer information at your agents' fingertips. The flow lets agents link contacts to cases created in Email-to-Case.

[Allow Updates to Email Message Related Records to Meet Business Rules](#)

Modify certain related records on incoming or outgoing email messages. Assign a user permission so that the automated case user for a process, for example, can adjust an address field or add an attachment link. Previously, a process couldn't make updates unless the email message was in the draft state.

[Find Email Messages Faster with Improved Searches](#)

When agents start to type a search string, search results include email messages with matching subjects. Previously, typeahead didn't consider email messages. To define which fields appear in your agents' search results, configure the search layout for Email Message records.

[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.

[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.

[The Ref ID Format for Email-to-Case is Changing](#)

The format for Ref ID threading in emails is changing in the Winter '24 release. If your org has custom code that uses Ref ID, get ready to test the code in sandboxes and update your code as needed when the format changes. Ref ID will still be supported, including backwards compatibility with the previous format, but Lightning Threading is the preferred way to do email threading.



## Transition to the Lightning Editor for Email Composers in Email-to-Case (Beta) (Release Update)

When enabled, this release update replaces the email editor in the docked and case feed email composers. Available in Lightning Experience as a beta feature, the Lightning editor provides an updated user interface and other new features: full-screen mode, the ability to print from the menu, undo and redo buttons, and smart copy-paste. It also complies with Salesforce security standards.

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

**When:** Salesforce enforces this update in Summer '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:** Salesforce is retiring the existing email editor in the docked and case feed email composers. We're switching to a feature-rich HTML text editor that's based on the open-source TinyMCE editor.

The new editor provides similar functionality in the docked and case feed email composers in Lightning Experience. Agents can upload images, attach files, use merge fields, and apply email templates.

**How:** After this release update is enabled, users see similar functionality when they compose and edit emails. For some plugins and complex features such as tables, beta limitations apply.

To get the latest Salesforce features including the new email editor, transition to Lightning Experience. Learn about beta considerations in Salesforce Help. Try out the new editor in a sandbox environment. To revert to the previous editor, disable the release update.

### SEE ALSO:

[Release Updates](#)

[Salesforce Help: Considerations for the Lightning Editor \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: How to Transition to Lightning Experience \(can be outdated or unavailable during release preview\)](#)

## Save Time by Linking Contacts to Cases in Email-to-Case

Add a flow that puts customer information at your agents' fingertips. The flow lets agents link contacts to cases created in Email-to-Case.

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

**How:** Use the individual-object linking flow template called Find Contact for Associated Case from Email-to-Case. Add it to the Actions & Recommendations component. If you customize and save it as a screen flow, for example, you can use it elsewhere.

The flow finds all contacts with email addresses that match the inbound email address that resulted in the case. Your agent then selects the right contact to link to the case.

Matching Contacts

Displaying search results for: ccopek@salesforce.com

Showing 1 of 1 item • 1 item selected

Full Name	Email	Business Phone	Mobile Phone	Home Phone	Asst. Phone	Other Phone
<input checked="" type="radio"/> Chris Copek	ccopek@salesforce.com					

Next

## SEE ALSO:

[Salesforce Help: Create a Flow to Link Contacts to Cases \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Flow Builder for Service and the Actions & Recommendations Component \(can be outdated or unavailable during release preview\)](#)

## Allow Updates to Email Message Related Records to Meet Business Rules

Modify certain related records on incoming or outgoing email messages. Assign a user permission so that the automated case user for a process, for example, can adjust an address field or add an attachment link. Previously, a process couldn't make updates unless the email message was in the draft state.

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

**How:** Assign the Update Email Messages user permission to a user, such as the automated case user for a process. The process can then insert an Email Message Relation object that updates the To, From, Cc, or Bcc address fields or a Content Document Link in the email message.

## Find Email Messages Faster with Improved Searches

When agents start to type a search string, search results include email messages with matching subjects. Previously, typeahead didn't consider email messages. To define which fields appear in your agents' search results, configure the search layout for Email Message records.

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

**How:** To make sure that email messages appear in search results, in Setup under Objects to Always Search, add the Email Message object to agents' profiles. Then configure the search layout in Object Manager so that the results include the right email message fields. Previously, you couldn't set up a search layout for Email Message records.

The screenshot shows the 'Email Message Search Results' configuration page in Salesforce Setup. The left sidebar contains a navigation menu with options: Details, Fields & Relationships, Page Layouts, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Related Lookup Filters, **Search Layouts**, List View Button Layout, Triggers, Flow Triggers, and Validation Rules. The main content area is titled 'Edit Search Layout Email Message Search Results' and includes a help link. Below the title is a note about field selection. The configuration area is divided into 'Available Fields' and 'Selected Fields' lists. The 'Available Fields' list includes Deleted, Created Date, Created By, Last Modified Date, Last Modified By, System Modstamp, Case Number, Text Body, HTML Body, From Address, and CC Address. The 'Selected Fields' list includes From Name, To Address, Subject, and Message Date. Between the lists are 'Add' and 'Remove' buttons. To the right of the 'Selected Fields' list are 'Up' and 'Down' arrow buttons. Below the lists is a checkbox labeled 'Override the search result column customizations for all users'. Further down are sections for 'Standard Buttons' (stating there are none) and 'Custom Buttons' (with a link to create a new custom list button). At the bottom are 'Save' and 'Cancel' buttons.

SEE ALSO:

[Salesforce Help: Personalize Search for User Profiles \(can be outdated or unavailable during release preview\)](#)

## 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:

[Release Updates](#)

## Use a Default No-Reply Address as System Address for Case Email Notifications (Release Update)

Configure a default No-Reply address from the Organization-Wide Addresses page 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.

SEE ALSO:

[Release Updates](#)

## The Ref ID Format for Email-to-Case is Changing

The format for Ref ID threading in emails is changing in the Winter '24 release. If your org has custom code that uses Ref ID, get ready to test the code in sandboxes and update your code as needed when the format changes. Ref ID will still be supported, including backwards compatibility with the previous format, but Lightning Threading is the preferred way to do email threading.

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

**Why:** Salesforce record IDs contain the ID of the server the record was created on. As additional servers come online, the format of compressed record IDs must change to accommodate larger server IDs.

**How:** This table shows the old and new formats.

Old Format	New Format (Winter '24)
ref:_00Dxx1gEW._500xxYkt1:ref	ref:!00Dxx01gEW.!500xx0Ykt1:ref

SEE ALSO:

[Knowledge Article: Disable Ref ID and Switch to Lightning Threading](#)

[Webinar: Email-to-Case: Lightning Threading Webinar](#)

## Feedback Management

Get responses from guest users who can take surveys without authentication. Get custom notifications and alerts for survey responses. View detailed delivery status for survey emails that are sent to a list of recipients.

## IN THIS SECTION:

### [Receive Responses from Unauthenticated Guest Users via APIs](#)

Previously, only authenticated users in your org could respond to surveys sent using Survey Response Connect APIs. Use the SFM unAuth Response APIs so that participants outside your Salesforce org can view basic surveys and respond to them without authentication.

### [Alert Users with Custom Notifications for Survey Responses](#)

Alert users with custom notifications for every survey response or whenever defined conditions are met. Create a data map to define trigger conditions and recipients for notifications.

### [Get a Quick Timeline View of Survey Responses](#)

Use Timeline to monitor survey responses. View information related to responses and understand respondents' interaction. You can enable a Timeline for both standard objects and custom objects.

### [Get Alerts Based on Survey Responses](#)

Use Record Alerts with survey data maps to notify agents when there's a change in records that require attention.

### [Get Granular Details on Survey Emails to Multiple Recipients](#)

View delivery details for survey invitation emails that are sent to a list of recipients. Get information such as the reason the survey didn't reach its intended recipients, the number of records processed, and the number of records that failed.

### [Feedback Management Videos](#)

New videos help you learn about the capabilities of Feedback Management.

## Receive Responses from Unauthenticated Guest Users via APIs

Previously, only authenticated users in your org could respond to surveys sent using Survey Response Connect APIs. Use the SFM unAuth Response APIs so that participants outside your Salesforce org can view basic surveys and respond to them without authentication.

**Where:** This change applies to Lightning Experience and Salesforce Classic in Enterprise, Unlimited, and Developer editions where Feedback Management - Growth is enabled.

**Who:** To send surveys using APIs so that unauthenticated participants can respond to surveys, users need the Salesforce Surveys Advanced Features permission.

**How:** To enable recipients to respond to surveys without providing authentication credentials, enable **Unauthenticated Survey Participation** on the Survey Settings page.

## Alert Users with Custom Notifications for Survey Responses

Alert users with custom notifications for every survey response or whenever defined conditions are met. Create a data map to define trigger conditions and recipients for notifications.

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

**Who:** To create custom notifications in data maps, users need the Salesforce Advanced Features Starter permission or the Salesforce Surveys Advanced Features permission.

**Why:** For example, you can create notifications to alert the customer support team every time a customer provides a particular score for a survey. You can set up notifications on user, opportunity, account, and public group records.

**How:** Open a survey, click **Advanced Settings**, and select **Survey Data Mapping**. Click **New Mapping**. Name the map, and select **Send Custom Notification**. Select a notification type, and add a notification title and a notification body. Select notification recipients

and choose whether notifications are sent every time or based on conditions. Finally, save the data map.

**New Mapping**

\*Name  
Follow-Up Case

Action Type ⓘ  
Send Custom Notification

\*Notification Type  
surveySendNotification

\*Notification Title ⓘ  
CSAT Alert

\*Notification Body ⓘ  
Customer provided a low score

Notification Recipients ⓘ

\*Recipient Type  
Record

\*Recipient  
Admin User

+ Add Recipient

Condition Type ⓘ  
☐ Every time  
☒ Based on conditions

Select Condition  
All conditions are met

Logic Type  
Response to Question

\*Question  
Please share your experience with us.

\*Operator  
is less than

\*Response  
4

+ Add Condition

Cancel Save

SEE ALSO:

[Salesforce Help: Create Data Maps to Send Custom Notifications Based on Survey Responses \(can be outdated or unavailable during release preview\)](#)

## Get a Quick Timeline View of Survey Responses

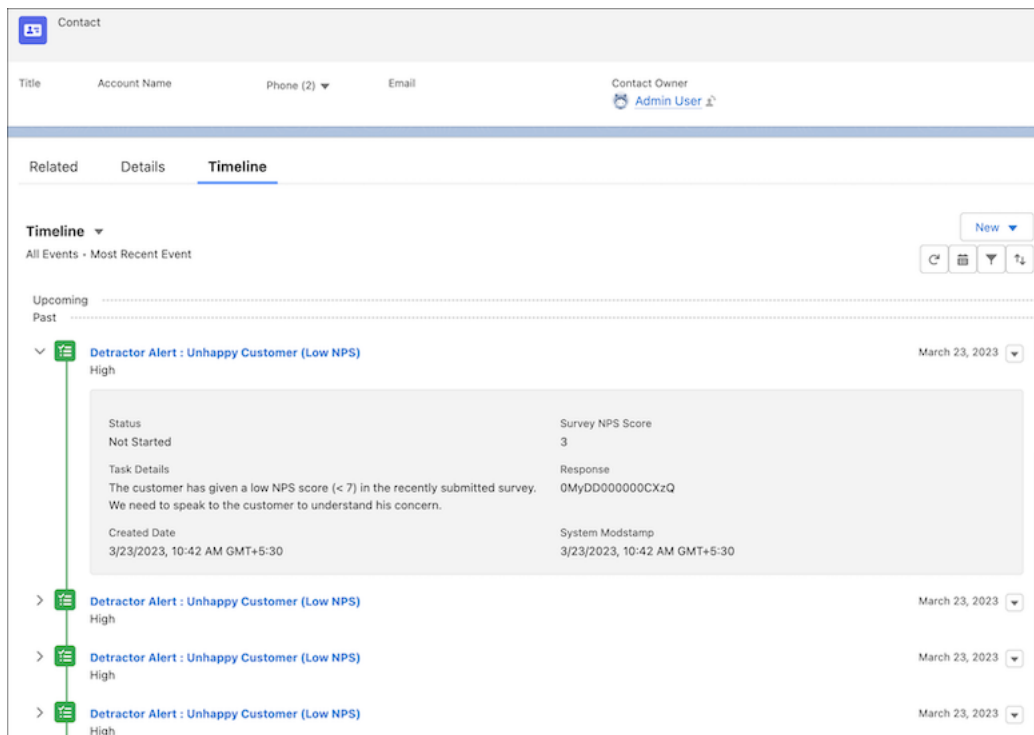
Use Timeline to monitor survey responses. View information related to responses and understand respondents' interaction. You can enable a Timeline for both standard objects and custom objects.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Feedback Management - Starter or Feedback Management - Growth is enabled with IndustriesServiceExcellenceAddOn.

**Who:** This feature is available to users with the Salesforce Advanced Features Starter permission or the Salesforce Surveys Advanced Features permission and the required Timeline permissions.

**Why:** For example, you can create a Timeline view for the contact object to display poor feedback from a user about a recently closed case.

**How:** Open a survey, click **Advanced Settings**, and select **Survey Data Mapping**. Click **New Mapping**. Name the map, choose **Create Record**, and select **Task** as the target object. Map the objects and choose whether records are created every time or based on conditions. Finally, save the map.



SEE ALSO:

[Salesforce Help: View Events Using Timeline in Salesforce \(can be outdated or unavailable during release preview\)](#)

## Get Alerts Based on Survey Responses

Use Record Alerts with survey data maps to notify agents when there's a change in records that require attention.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Feedback Management - Starter or Feedback Management - Growth is enabled with IndustriesServiceExcellenceAddOn and FSCAlertFramework. You can see Record Alerts on the Alerts component in the service console.

**Who:** This feature is available to users with the Salesforce Advanced Features Starter permission or the Salesforce Surveys Advanced Features permission, and the required Record Alerts permissions.

**Why:** For example, you can create alerts to display survey responses in the service console of support agents.

**How:** Open a survey, click **Advanced Settings**, and select **Survey Data Mapping**. Click **New Mapping**. Name the map, choose **Create Record**, and select **Record Alert** as the target object. Map the objects and choose whether records are created every time or based on conditions. Finally, save the map.

SEE ALSO:

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

## Get Granular Details on Survey Emails to Multiple Recipients

View delivery details for survey invitation emails that are sent to a list of recipients. Get information such as the reason the survey didn't reach its intended recipients, the number of records processed, and the number of records that failed.

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


**How:** In Survey Builder, click **Send | Send Email**. Embed either a survey link or a question in the email body, and click **Next**. Select **Send to List**, and define the survey recipients group. Click **Next**, and update or customize the email content. Click **Next** and click **Send**.

SEE ALSO:

[Salesforce Help: Send Survey Invitations by Email \(can be outdated or unavailable during release preview\)](#)

## Feedback Management Videos

New videos help you learn about the capabilities of Feedback Management.

-  [Set Up Salesforce Feedback Management](#) shows how admins can enable Surveys, give colleagues the permissions to create, send, delete, manage, and respond to surveys, and guest users the permissions to respond to surveys.

## Self-Service

Self-Service provides an online support channel for your customers, allowing them to resolve their inquiries without contacting a customer service representative.

IN THIS SECTION:

[Add Knowledge Pages to Your Enhanced LWR Site](#)

Help users self-serve and find solutions quickly with the new Knowledge Article page for LWR sites. Now you can add knowledge articles to your Self-Service portal's Knowledge Article Details page. Previously, the ability to add knowledge articles to pages was available only in Aura, making it inaccessible to LWR users.

[Customize Knowledge Articles with the Knowledge Article Component](#)

Site visitors can now view knowledge articles in LWR. Administrators can toggle between field labels and field sections and adjust the style of the knowledge article title. Mandatory field labels, such as URL Name, that your site visitors don't need are also hidden. And employees can customize knowledge articles in an unauthenticated help center and via an authenticated portal. Previously, the Knowledge Article component was available only in Aura, making it inaccessible to LWR users.

## Add Knowledge Pages to Your Enhanced LWR Site

Help users self-serve and find solutions quickly with the new Knowledge Article page for LWR sites. Now you can add knowledge articles to your Self-Service portal's Knowledge Article Details page. Previously, the ability to add knowledge articles to pages was available only in Aura, making it inaccessible to LWR users.

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

SEE ALSO:

[Salesforce Help: Add Knowledge Pages to Enhanced LWR Sites \(can be outdated or unavailable during release preview\)](#)

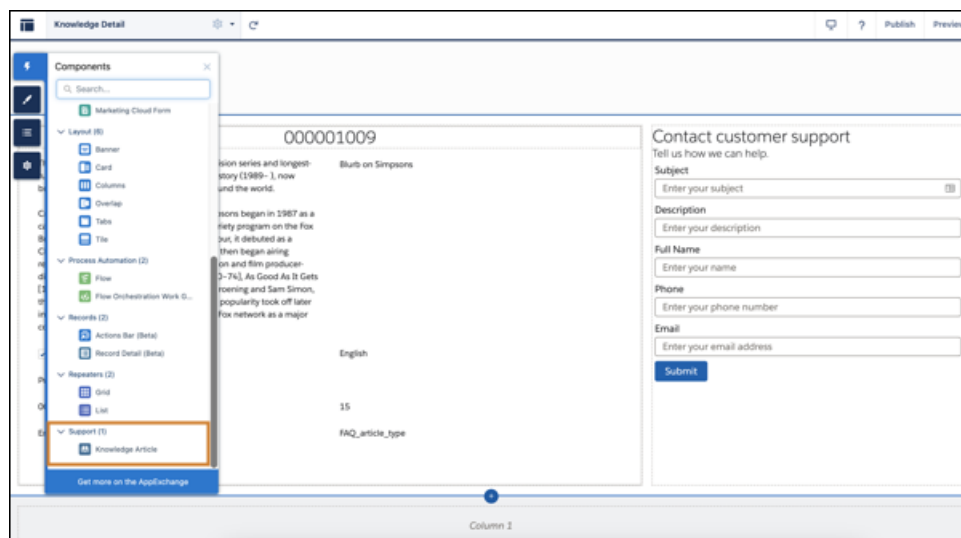
## Customize Knowledge Articles with the Knowledge Article Component

Site visitors can now view knowledge articles in LWR. Administrators can toggle between field labels and field sections and adjust the style of the knowledge article title. Mandatory field labels, such as URL Name, that your site visitors don't need are also hidden. And employees can customize knowledge articles in an unauthenticated help center and via an authenticated portal. Previously, the Knowledge Article component was available only in Aura, making it inaccessible to LWR users.



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

**How:** Add the Knowledge Article Component to your LWR site.



SEE ALSO:

[Salesforce Help: Add the Knowledge Article Component to Enhanced LWR Knowledge Pages](#) (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, and Trailhead GO.

## Customer Success Group

Salesforce Customer Success gives every customer access to resources and expertise from the world's most extensive success ecosystem. From easy-to-use resources to embedded solution experts, we help you create your own path to success. With each release, we introduce new and better ways to help you see results from all your Salesforce products. Highlights for Summer '23 include:

- Premier and Signature Success Plans for MuleSoft
- Signature Success Plan: Customer Success Score, Architecture Guidance
- Premier Success Plan: Expert Coaching Enhancements

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](https://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 you to skill up and connect from anywhere. The newest release adds enhancements to the Trailblazer.me Profile and Trailhead search. The Hire Me button is now available to help indicate your interest in new work opportunities and connect you with potential hiring managers. This release also adds Community Tags, so you can display your communities and personas on your Trailblazer.me Profile. We have also added new Trailhead content filters to help you easily find specific learning modules based on newest release, points available, and estimated time to complete.

Trailhead GO is available on iPhone, iPad, and Android devices.

- Android: [Trailhead GO at Google Play](#)
- iOS: [Trailhead GO at the App Store](#)

## Release Updates

---

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

Every time a release update is created, it gets scheduled to be enforced in a future release. We announce each update and its schedule here as soon as that schedule is known, but occasionally, updates are postponed or canceled. If that happens, we let you know in the section that describes that specific release update.

Often, release updates provide a Test Run 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.

**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 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.

**Enable Sharing for Flow Orchestration Objects (Release Update)**

In Summer '23, Salesforce enables sharing for Flow Orchestration objects. With this change the Manage Flow user permission no longer grants user access to Flow Orchestration objects. To cancel or debug an orchestration or to reassign an orchestration work item, a user needs the Manage Orchestration Runs and Work Items user permission, along with sharing 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 of 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, you must manually update the Google Analytics Tracking ID for each of your Aura sites 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 connected to Google Analytics with a UA-ID. This update was first available in Spring '23 and is enforced in Summer '23.

**Opt in for Event Log File Generation (Release Update)**

With this update, event log files are generated and delivered only to orgs that opt in to receive event log files. Previously, all orgs received event log files automatically. This update automatically disables event log file generation for Developer and Trial editions and for orgs 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 was first available in Spring '23 and is enforced in Summer '23.

**Restrict Emails Sent from Unverified Email Addresses by the Guest User (Release Update)**

To improve security standards, Salesforce is blocking any emails sent from an unverified email address in the guest user record. This update is enforced with the Summer '23 release. When this update is enforced, emails sent from the org using a guest user's unverified email address are blocked.

**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.

## 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 Continues: 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. The first phase of orgs completed MFA auto-enablement in Spring '23. For orgs in the second phase, MFA is auto-enabled with Summer '23. For orgs in the third phase, MFA is auto-enabled with Winter '24. Auto-enablement concludes for any remaining orgs in Spring '24.

#### **Deliver Products and Services with Service Catalog (Generally Available July 18, 2023)**

Use Service Catalog, now generally available, to turn your customers' requests for products and services into approved and documented orders. For example, automate frequent requests like resetting a password. Previously, Service Catalog was available only as part of Work.com.

## **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.

#### **Disable Access to Session IDs in Flows (Release Update)**

To improve security, this update prevents flow interviews from resolving the `$Api.Session_ID` variable at run time. Previously, when a flow screen included the `$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.

#### **Enable Faster Account Sharing Recalculation by Not Storing Case and Contact Implicit Child Shares (Release Update)**

To improve performance, Salesforce is changing the way that automatic account sharing recalculation works behind the scenes for the Case and Contact objects. We no longer store implicit child share records between accounts and their child case and contact records. Instead, the system determines whether users can access child case and contact records when they try to access them. This release update is available starting in Summer '23.

#### **Identity Connect 3.0.1.2 Security Patch Is Being Removed**

Because Identity Connect 3.0.1.2 isn't supported, the Identity Connect 3.0.1.2 Security Patch is no longer available as of Winter '24. The Implementation Guides for Identity Connect versions 3.0.1.2 and 2.1.0 will be removed at the same time.

#### **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 made available in Winter '23, and was scheduled to be enforced in Winter '24. The enforcement date has been postponed to Spring '24.

#### **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 was first available in Spring '23 and was scheduled to be enforced in Summer '23, but we postponed the enforcement date to Winter '24.

#### **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, the current Japanese Industrial Standards (JIS) style will be replaced with the 1991 Cabinet Notification Directive style in Winter '24.

#### **Require Sender Name and Email Address to Send Chatter Email Notifications (Release Update)**

Salesforce enforces this update in Winter '24 to follow the latest security recommendations. Administrators must provide a Chatter email From Name and Email Address for Chatter email notifications to continue being sent.

## **Scheduled to Be Automatically Enabled in Winter '24**

The features related to these updates are scheduled to be automatically enabled, but not enforced, in Winter '24. 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 Continues: 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. The first phase of orgs completed MFA auto-enablement in Spring '23. For orgs in the second phase, MFA is auto-enabled with Summer '23. For orgs in the third phase, MFA is auto-enabled with Winter '24. Auto-enablement concludes for any remaining orgs in Spring '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 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 made available in Winter '23, and was scheduled to be enforced in Winter '24. The enforcement date has been postponed to Spring '24.

#### **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 JDK locale formats in Salesforce. This update was first made available in Winter '20 and is enforced in Spring '24.

#### **Enable Lightning Article Editor and Article Personalization for Knowledge (Beta) (Release Update)**

Unlock a richer and more user-friendly experience with the new Lightning Article Editor. And with Article Personalization, your knowledge content is tailored to your business needs and unlocks agent productivity.

#### **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.

**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. 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 Spring '24.

**Enable EmailSimple Invocable Action to Respect Organization-Wide Profile Settings (Release Update)**

With this update enabled, the EmailSimple invocable action adheres to organization-wide email address profile settings.

**Enforce Rollbacks for Apex Action Exceptions in REST API (Release Update)**

This update preserves data integrity by rolling back transactions that end in an exception. When you execute an Apex action using REST API, the API doesn't change Salesforce data if that exception occurs. This update, originally named Enforce Rollbacks for Custom Invocable Action Exceptions in Connect REST API, was first made available in Spring '23 and was scheduled to be enforced in Winter '24, but we postponed the enforcement date to Spring '24.

## Scheduled to Be Enforced in Summer '24

These updates are scheduled to be enforced in Summer '24. The list can include new, previously announced, and previously postponed release updates.

**Run Flows in Bot User Context (Release Update)**

With this update enabled, a flow initiated by a bot uses the user profile and permission sets associated with the bot to determine the object permissions and field-level access of the flow. This update is available starting in Summer '23.

**Transition to the Lightning Editor for Email Composers in Email-to-Case (Beta) (Release Update)**

When enabled, this release update replaces the email editor in the docked and case feed email composers. Available in Lightning Experience as a beta feature, the Lightning editor provides an updated user interface and other new features: full-screen mode, the ability to print from the menu, undo and redo buttons, and smart copy-paste. It also complies with Salesforce security standards.

## 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. This update was scheduled for enforcement in Summer '20 but was postponed to Summer '25. This update was also previously scheduled for enforcement in Winter '21, Winter '22, and Summer '23..

**Salesforce Platform API Versions 21.0 Through 30.0 Retirement (Release Update)**

The retirement of versions 21.0 through 30.0 of the Salesforce Platform API was first scheduled for Summer '23. The retirement is now postponed to Summer '25. You can continue to use these API versions but they're not supported and won't be available starting in Summer '25. Applications consuming them are then disrupted. Requests fail with an error message indicating that the endpoint is deactivated. Upgrade all applications that use a legacy API version to a current version before this breaking change occurs.

## 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.

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

This release update has been postponed indefinitely.

## 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](#).

### Business Associate Addendum Restrictions

For a complete list of changes to the Business Associate Addendum Restriction documents, see the [Business Associate Addendum Restrictions Change Log](#).

### Acceptable Use Policy

For a complete list of changes to the Acceptable Use Policy documents, see the [Acceptable Use Policy Change Log](#).