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# Salesforce Release Notes

Salesforce, Spring '24

Future-proof your business with Data + AI + CRM + Trust

'24





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# SALESFORCE SPRING '24 RELEASE NOTES

See how the Spring '24 release helps teams work smarter with new product innovations built on Data + AI + CRM + Trust.

## [What's New for the Salesforce Release Notes?](#)

Learn about new features that make the Salesforce release notes easier to use. Think of this page as the release notes for the release notes and check back each seasonal release to see what's new and improved. We also welcome your feedback.

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

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

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

Reading the release notes is a great step in preparing for the release. These other resources help get you 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 Notes for Features Released Monthly](#)

Salesforce releases features and enhancements more frequently than three times per year for some products. Find out what's new and read more about these features, as often as monthly, right here in the seasonal release notes.

## [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 Spring '24 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.

## [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.

## [Analytics](#)

Analytics enhancements include new and updated features for Lightning reports and dashboards, Data Cloud reports and dashboards, CRM Analytics, Intelligent apps, and Tableau.

## [Commerce](#)

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

## Salesforce Spring '24 Release Notes

### Customization

Give record page users more of what they need where and when they need it with enhancements to Dynamic Forms-enabled Lightning pages. Access invoice, payment, shipment, and return data in Snowflake more easily using Salesforce Connect adapter for SQL.

### Data Cloud

Ingest, harmonize, unify, and analyze streaming and batch data with Data Cloud. Then use that data to unlock meaningful and intelligent experiences across Customer 360 applications and beyond.

### Deployment

Check out what's new in deployment.

### Development

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

### Einstein

Supercharge your workforce efficiency with predictive and generative AI.

### Experience Cloud

Discover a number of upgrades to improve your LWR and Aura sites. See all your site publication changes in Experience Builder with the Change History panel. Use improved URL configuration options to make your URLs SEO friendly and drive more traffic to your LWR sites. Improve site performance, scalability, security, and SEO with Experience Delivery (pilot), a new LWR site infrastructure. And build more personalized sites with Expression-Based Component Variations, now generally available.

### Field Service

See what's new in Field Service to help your team deliver on performance and customer service.

### Hyperforce

Hyperforce is the next-generation Salesforce infrastructure architecture built for the public cloud. It provides Salesforce applications with 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. Streamline delivery and distribution processes and run better promotions with Consumer Goods Cloud. Create and execute financial plans with Financial Services Cloud. Health Cloud optimizes home visit scheduling and offers new ways to view, update, and create care plans. Run better promotions and boost member engagement with Loyalty Management. Net Zero Cloud streamlines disclosure management and reporting. Boost caseworker efficiency and reduce administrative burden with Public Sector Solutions. Manage mentoring programs, learning programs, and learning courses with Learning Wizard in Salesforce for Education. We also have plenty of changes for Automotive Cloud, Manufacturing Cloud, Salesforce for Nonprofits, Industries common features, and many more.

### Marketing Cloud Growth

Marketing Cloud Growth edition uses the power of the Salesforce platform and reimagined core objects to offer a curated experience just for marketers. This experience is generally available in Spring '24. Kick-start campaigns with predefined options, build meaningful audiences from unified data, and create automated messaging using new flow elements. Plus, get a little help from Einstein generative AI along the way. Admins can use the setup assistant in Salesforce Setup and the implementation guide to help prepare and customize your Marketing Cloud Growth.

### Marketing Cloud Engagement

Marketing Cloud Engagement 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.

## Salesforce Spring '24 Release Notes

### [Marketing Cloud Account Engagement](#)

Streamline processes and improve personalization with generative AI, enhanced Data Cloud integration, and a new email editing experience. Update your sending domains to prepare for upcoming changes to the Gmail and Yahoo email platforms in 2024.

### [Mobile](#)

Accomplish tasks faster with Einstein Copilot. Mobile Offline for Salesforce Mobile App Plus gets updates to the Offline App Developer Starter Kit, Offline App Onboarding Wizard, and the new Mobile Builder (beta). Add a biometric ID check to your Mobile Publisher for Experience Cloud app. Easily expand or collapse all rules when you view the details of a briefcase in Briefcase Builder.

### [OmniStudio](#)

In the Spring '24 release, OmniStudio Standard (when the Managed Package Runtime setting is disabled) supports features from OmniStudio for Vlocity, including specifying XML publish options for FlexCards, tracking use of OmniStudio components, updating addresses with Google Maps, sending documents on behalf of others, and migrating all versions of OmniStudio components.

### [Revenue](#)

Automate and scale your revenue operations with a robust portfolio of Revenue Cloud products. Introducing Revenue Lifecycle Management—meticulously crafted through customer collaboration to enable product-to-cash automation on one trusted platform. Salesforce CPQ offers improved security with an integration user. Salesforce Billing provides enhanced error logs and a batch invoice run cleanup process so that it's easier and faster to generate correct invoices. And Subscription Management includes security and usability improvements so that you can manage recurring revenue operations with ease.

### [Sales](#)

Boost your sales teams' results with new Einstein features, detailed metrics, and simplified setup experiences. Einstein for Sales users can harness the power of generative AI to draft sales emails, answer questions about sales calls, and find similar past won deals. Your sales teams can use Seller Home to see an overview of metrics, goals, suggestions, and activities. Sales reps can use Salesforce Maps Lite to plan in-person and virtual visits in key geographic areas. Revenue Insights has a simplified setup experience, and sales reps can use Stage Conversion analysis to dive into their pipeline details. Pipeline Inspection has a more responsive UI. And in Partner Relationship Management, your channel managers can use the Channel Management Console as a command center for your teams' indirect sales.

### [Salesforce CMS](#)

Create content publication schedules and preview content in Salesforce CMS.

### [Salesforce Flow](#)

Compose intelligent workflows with Flow Builder and Flow Orchestration. Integrate across any system with Flow Integration.

### [Salesforce for Slack Integrations](#)

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

### [Security, Identity, and Privacy](#)

View anomalous guest user activity right from the Threat Detection app in Security Center. Update your trusted URLs for an upcoming change. Reduce your reliance on redirections for your legacy Salesforce domains. Access External Key Management in all commercial zones. Use the OAuth 2.0 token exchange flow, enable the OAuth 2.0 refresh token rotation, or set up any of a handful of external client app OAuth 2.0 flows.

### [Service](#)

Check out new features that enable customer service agents to work faster and more productively across customer service channels.

### [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.

### [Legal Documentation](#)

We made seasonal updates to Salesforce Legal Documents.

## What's New for the Salesforce Release Notes?

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Learn about new features that make the Salesforce release notes easier to use. Think of this page as the release notes for the release notes and check back each seasonal release to see what's new and improved. We also welcome your feedback.

### Get Release Update Information More Easily

Thanks to valuable user feedback on how customers find and use this timely content, we moved the Release Updates section closer to the top of the Release Notes table of contents. Find it just after the Salesforce Overall section.

### Discover Einstein Features All in One Place

We consolidated the Einstein and Einstein Generative AI sections of the release notes into a single Einstein section. This change makes it easier to find our smartest features and platform improvements, whether they're powered by predictive AI, generative AI, or both. Einstein features and platform changes are released as often as monthly.

### Follow Salesforce Customer Success on X for Updates on Documentation

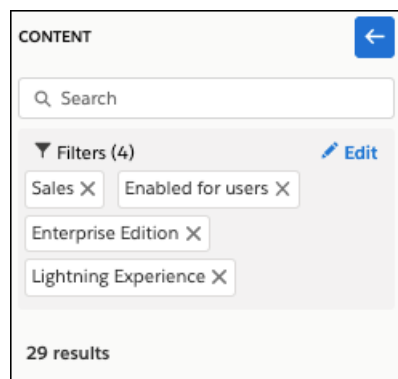
We're retiring the @salesforcedocs X handle and joining forces with Salesforce Customer Success at [@asksalesforce](#). Follow us there for select documentation updates and highlights.

## How to Use the Release Notes

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


- 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.



- The IdeaExchange icon  in the title of a release note indicates that we delivered (or partially delivered) this feature thanks to your ideas. Submit, view, and vote on ideas on [IdeaExchange](#).

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 #Spring24Feedback.
- **Feedback forms**—As you're working with our documentation in Salesforce Help, release notes, or developer guides, look for the feedback buttons and vote up or down. Add comments if you have them.
- **Salesforce Customer Success on X**—Follow Salesforce Customer Success at [@asksalesforce](#) for select documentation updates and highlights.

 **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

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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.

## Spring '24 Highlights for Admins

Check out this video for a preview of key features for admins in Spring '24. This video is live the week of January 8, 2024.

 [Watch a video](#)

## 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.
- [Spring '24 Pre-release Signup](#). Sign up for a pre-release org to get early access to the new features.
- [Release Readiness Live](#). Register and make the most of the new features.
- [Release Demos](#). Get quick video overviews of what's coming this release.
- [Spring '24 Release Website](#). Check out the new features.
- [Spring 24 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.
- [Admin Release Resources](#). Prepare for Spring '24 with blog posts, videos, and more resources for Salesforce Admins.
- [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 Guide](#). 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 Notes for Features Released Monthly

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Salesforce releases features and enhancements more frequently than three times per year for some products. Find out what's new and read more about these features, as often as monthly, right here in the seasonal release notes.

As you explore this content, keep these considerations in mind.

- Monthly release notes aren't the same as release notes for delayed features. Sometimes, a feature released seasonally is subject to a slight delay. When that happens, the timing is explained in the "When" section of that feature's release note.
- New monthly release notes aren't the same as changes to previously published release notes. Sometimes, we need to update previously published release notes for the current seasonal or monthly release. When we make those updates, we list the specific change in the "Release Notes Changes" topic.
- Sometimes, monthly releases coincide with seasonal releases. When that happens, we identify related release notes by the first full month of the seasonal release. These features are available when Salesforce rolls out the Spring '24 release to your instance.

For example, the Spring '24 release begins rolling out to customer instances in mid-January of 2024. Release notes for features released in January or February are linked to from a topic called "February '24 Release." Release notes for features released in March 2024 are linked to from a topic called "March '24 Release."

### [May '24 Release](#)

Learn about features released in May '24.

### [April '24 Release](#)

Learn about features released in April '24.

### [March '24 Release](#)

Learn about features released in March '24.

### [February '24 Release](#)

Learn about features released in February '24.

### [January '24 Release](#)

Learn about features released in January '24. Features included in the January '24 monthly release become available when Spring '24 rolls out to your instance.

## May '24 Release

Learn about features released in May '24.

[Einstein Features](#)

[Einstein Platform](#)

## April '24 Release

Learn about features released in April '24.

[Einstein Features](#)

## March '24 Release

Learn about features released in March '24.

[Einstein Features](#)

[Einstein Platform](#)

## February '24 Release

Learn about features released in February '24.

[Einstein Features](#)

[Einstein Platform](#)

## January '24 Release

Learn about features released in January '24. Features included in the January '24 monthly release become available when Spring '24 rolls out to your instance.

[Einstein Features](#)

[Einstein Platform](#)

## Release Note Changes

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

### May 6, 2024

#### **Refine Access with Data Spaces Feature Permissions**

Added a release note about enhanced security data space permission sets.

#### **Update Organization-Wide Defaults Faster**

Updated the timeline for the feature's rollout.

#### **Temporarily Opt Out of Google Chrome Storage Partitioning**

Added a release note to announce a setting that disables Google Chrome storage partitioning until September 2024.

#### **Streamline Everyday Activities with Einstein Copilot on the Field Service Mobile App**

Update the timeline for general availability.

#### **Expand Date Ranges in Batch Data Transforms**

Added a release note on the availability of explode and sequence functions for formulas.

#### **Removed: Fix Your Prompt Builder Errors More Easily**

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

**Removed: Ground Your Prompts Automatically with Record Snapshot**

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

**Removed: Research Companies and Individuals with One Click**

The update to this feature isn't quite ready, so we're removing it while we make improvements.

**Removed: Data Streams Connect APIs**

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

**Bring PostgreSQL Database Data into Data Cloud with the Heroku PostgreSQL Connector**

Added a release note about the Heroku PostgreSQL connector for Data Cloud.

## April 29, 2024

**New Connect REST API Resources in Health Cloud**

Updated a release note to announce a new Digital Verification API in Health Cloud.

**New Connect REST API Resource**

Added a release note to announce the new resource available with Product Configurator.

**Select Who Has Access To a Sandbox**

Increase security of your sandboxes by providing access to only a subset of users using a public group.

**Service Account OAuth 2.0 Authentication to Microsoft Office 365 Is Being Retired**

Announced changes to Service Account OAuth 2.0 authentication for Einstein Activity Capture connections to Microsoft Office 365.

## April 22, 2024

**Changed Connect REST API Response Bodies**

Added a release note to announce a new property—`contextTagMessages`—on the existing Simulation Step Explainability Message Output response body.

**Get 10 Einstein Conversation Insights Licenses with Enterprise Edition**

Updated the release note to highlight a later release date for some orgs.

**New and Changed Objects in Salesforce Quote and Order Capture**

Added a release note to announce a new object in quote order capture.

**Permission Requirements for the Consent Event Stream Are Enforced**

Added a release note to announce that the documented permission requirements for the Consent Event Stream are enforced.

**Access and Download Event Log File Data with the Event Log File Browser (Beta)**

Updated the availability statement. Event Log File Browser (Beta) is available in Lightning experience only.

## April 15, 2024

**PlaceQuote Namespace**

Added a release note to announce the `PlaceQuote` Apex namespace.

**Migrate Managed Packages to Education Cloud**

Added a release note announcing Education Cloud Data Migration Kit.

**Associate AppExchange Leads with Marketing Campaigns, Promotions, and Other Traffic Sources**

Added a release note announcing enhancements to AppExchange lead descriptions.



**See Password Resets in the Login History and New and Changed Objects**

Added release notes to announce that you can now track password resets in the Login History and the API updates that support this feature.

## April 8, 2024

**Activate Audiences to Google DV360**

Updated the release note to change the release date from April to May.

**Metadata API**

Added release notes announcing changes to the Skills and EmbeddedServiceMenuSettings metadata types.

**Metadata API**

Added release notes to announce new fields on the existing Bot type, BotStep subtype, and BotVariableOperation subtype.

**Use the Null Coalescing Operator**

Updated the code sample.

**Removed: Troubleshoot Invoice Processing Issues Accurately and Efficiently (Salesforce Billing)**

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

**Salesforce for Outlook (Retiring)**

The retirement date is now December 2027.

**Automate Business Processes with the Get Record Details Action**

Added a release note to announce the introduction of the Get Record Details action.

**Experience Streamlined Navigation in KPI Bar**

Added a release note about the new feature that allows list creators to show or hide KPI Bar.

**Optimize Business Performance by Using Custom Key Performance Indicators**

Added a release note regarding the maximum number of custom key performance indicators (KPIs) that list creators can add to KPI Bar.

**Import Data with CSV Data Management for Industries**

Added a release note announcing CSV Data Management's use in Nonprofit Cloud.

**Ingest Data from Kinesis Data Streams into Data Cloud with the Amazon Kinesis Connector (Generally Available)**

This feature is generally available. Updated the content to remove the beta tag.

**Control Your Data Model By Changing DMO Category**

Added release note about the ability to change the category of a DMO in Data Cloud.

**UI Text and Functionality Improvements in Privacy Center**

Updated this release note to reflect new UI text and functionality changes in Privacy Center.

## April 1, 2024

**Build Data Cloud Apps Using Second-Generation Managed Packaging**

Added a release note announcing Data Cloud support for second-generation packaging (2GP).

**Removed: Encrypt Search Index Keys With Manageable Root Keys**

This feature isn't ready, so we're removing it for now. Look for it in a future release.

**New and Changed Objects**

Announced new UnifiedActivity objects.

**New Connect REST API Resource in Scheduled Reminders**

Added a release note announcing a new resource that's available with Scheduled Reminders.

**Save a Transcript of Your Messaging for Web Conversation**

Added a release note announcing the ability for users to download transcriptions of Messaging for Web conversations.

**Add New Connectors to Ingest Data Into Data Cloud (Beta)**

Added a release note announcing connectors to ingest data into Data Cloud.

**Tooling API New and Changed Objects**

Added a release note announcing changes to the EmbeddedServiceConfig Tooling object.

## March 25, 2024

**New and Changed Objects**

Added to the LargeLanguageModel and IsGenerateByLLM fields to the KnowledgeArticleVersion and KnowledgeArticle api objects release note.

**Explore AppExchange Solutions Based on Your Interests**

Added a release note announcing AppExchange Explore.

**Navigate AppExchange More Efficiently**

Added a release note announcing updates to the AppExchange navigation experience.

**Get More Insights About Your Customer's Discovery Journey in the Updated AppExchange Marketplace Analytics Dashboard**

Added a release note announcing updates to AppExchange Marketplace Analytics.

**Update OmniStudio Designer Settings**

Added a release note announcing changes to OmniStudio settings in Education Cloud.

**Wrap Up Call and Enhanced Messaging Sessions Faster with Einstein Work Summaries**

Added information about additional language support for Work Summaries for Enhanced Messaging and Voice.

**Receive Additional Status Information During Headless Forgot Password Flow**

Added a release note describing the `status` parameter that Salesforce returns to the client during the Headless Forgot Password flow.

**Say Goodbye to Standard WhatsApp Channels**

Added a release note announcing changes to the availability of standard WhatsApp channels.

**New and Changed Objects**

Added information about the new `Name` field on the existing VoiceCall object.

**Resolve and Deflect Issues with Einstein Search Answers (Generally Available)**

Removed details about pilot program deadlines because pilot customers are being given more time to move to GA.

**UI Text and Functionality Improvements in Privacy Center**

Announced several updates to the user interface text in Privacy Center.

## March 18, 2024

**Query Data Graphs for Metadata and Data Using the Data Graphs APIs**

Added a release note on querying data graphs.

**Get Your Mobile Workers Up to Speed with Pre-Work Brief**

Updated the instructions for setting up this feature.

**Get Started with Einstein Features for the Field Service Mobile App**

Announced the new permission set for Einstein for Field Service mobile features.

**Connect a Data Space to an Activation Target**

Updated the release note with information about the auto-assignment of existing activations to a data space and added a link to a relevant Knowledge Article.

**Preview Your Messaging for Web Branding and Configurations**

Wrote a new release note about the Test Messaging feature for Messaging for Web customers.

**New and Changed Objects**

Updated the release note for the `AUTHENTICATION_SERVICE_ID` field on the Login event type to clarify that it stores IDs for SAML single sign-on providers in addition to token exchange handlers.

**Changed Invocable Actions**

Added a release note to announce a new property that's available with Intelligent Document Reader's `initiateTextExtraction` invocable action.

**Changed Invocable Actions**

Added a release note to announce a new property that's available with Intelligent Form Reader's `initiateTextExtraction` invocable action.

**CommerceOrders Namespace**

Added a release note to announce the `CommerceOrders` Apex namespace.

**Save Assessments as Drafts to Complete Later in Health Cloud**

Clarified that this feature is available only if Health Cloud is enabled.

**Save Assessments as Drafts to Complete Later**

Added information about the `HCUsageType` seed data JSON.

**Stay on Top of Push Notifications for Salesforce Authenticator**

Added a release note for Salesforce Authenticator updates.

**Embed Tableau Pulse Data in Lightning Pages**

Added a release note to announce that Tableau Pulse Lightning web component is available.

**Recover Transcripts After Service Downtime and Errors**

Announced that Service Cloud Voice can recover transcripts in certain scenarios.

## March 11, 2024

**Get Fewer User Connection Notifications**

Announced new frequency of Einstein Activity Capture user connection notifications.

**Fine-Tune Your Segment with New Boolean Expressions**

Added a release note about fine-tuning segments with new boolean expressions.

**Use Partitioned Domains in More Orgs**

Updated the feature availability. Partitioned domains are now available in scratch orgs on Salesforce Edge Network

**Unify Your Organizational Knowledge Across Sources in Salesforce (Beta)**

Updated the date that Unified Knowledge is available in production orgs to March 8, 2024.

**Resolve and Deflect Issues with Einstein Search Answers (Generally Available)**

Updated the Service Cloud SKU names and supported editions.

**Provide Service and Marketing Together with Unified Messaging for WhatsApp**

Added a release note about the new Unified Messaging feature.

**Marketing Cloud Growth**

Removed a disclaimer about a delay in web tracking functionality for Marketing Cloud Growth.

**Changed Connect in Apex Input Classes**

Added a release note to announce the new properties available with the `ConnectApi.ServiceAppointmentInput` class.

**Experience Improvements to Sandbox Cloning and Org Migrations for Named Credentials**

Updated the release note to include a link to a relevant topic in Salesforce Help.

**Removed: Improve Bot Conversations with Disambiguation (Beta)**

This feature isn't quite ready for showtime, so we're removing it for now while we make improvements. We'll let you know once it's back up.

**Protect Your Agents' Identities with Agent Aliases**

Removed the requirement that Enhanced Omni-Channel must be enabled to use the agent alias feature.

**Save Time by Creating Call Scripts and Email Templates with Quick Cadences**

Added a release note about creating call scripts and email templates while adding a quick cadence.

**New Invocable Actions**

Added a release note to announce the new invocable actions in Salesforce Pricing.

**New Metadata Types**

Added a release note to announce the new metadata types in Salesforce Pricing.

**Deploy and Retrieve More Metadata via REST and SOAP Metadata API**

Added a release note about the increase in the Metadata API SOAP retrieve and REST deploy maximum from 400 MB to 600 MB.

**Create a Data Kit with More Connection Options**

Added a release note about new connections supported in a data kit.

**New Connect REST API Resources**

Added a release note to announce the new Fundraising APIs in Nonprofit cloud.

**Metadata API**

Added a release note to announce the new parameters `dataSpaceApiName` and `isPrimaryKeyfields` on the existing `BatchCalcJobDefinition` metadata type.

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

Added a release note for a re-launched release update.

**Make Flows Respect Access Modifiers for Legacy Apex Actions (Release Update)**

Added a release note for a re-launched release update.

**Disable Access to Session IDs in Flows (Release Update)**

Added a release note for a re-launched release update.

**Enable Partial Save for Invocable Actions (Release Update)**

Added a release note for a re-launched release update.

**Salesforce Relaunches Four Previously Enforced Release Updates**

Added an overview release note for re-launched release updates.

## March 4, 2024

**Close Cases More Efficiently with Work Summaries in Einstein Copilot (Beta)**

Removed a the requirement to turn on Work Summaries for Copilot in Setup.

**Integrate with Data Cloud to Harness Site Data (Beta) on page 328**

Added a release note announcing the ability to integrate Experience Cloud with Data Cloud.

**Block Sensitive Data in Enhanced Messaging, Messaging for In-App and Web, and Voice Transcripts**

Removed a release note because sensitive data rules are temporarily not supported in these channel types due to a known issue. Sensitive data rules are still supported in standard messaging channels.

**New and Changed Objects**

Added information about the FileSearchActivity object.

Added information about the SearchActivity object.

Added information about the MsgChannelUsageExternalOrg object.

Added information about the MessagingChannelUsage object.

**New and Changed Connect REST API Resources**

Added release notes for five new Data Cloud Data Graphs Connect API resources.

**Allow the New Setup Domain to Ensure Access to Salesforce Setup Pages**

Updated the release note to align with the program timeline.

**Metadata API**

Added information about the `enableInAppLearning` field on the existing LightningExperienceSettings metadata type.

**CommerceTax Namespace**

Added release notes for the `commercetax` Apex namespace.

**Streamline Dispute-Related Communications with Prebuilt Email Prompt Templates**

Added a release note about generating dispute-related customer responses with prebuilt email prompt templates.

**Tooling API New and Changed Objects**

Added a release note to announce the new `ActivationUserGroupId` field on the existing `SandboxInfo` and `SandboxProcess` objects.

**Enjoy a Richer Email Composer Experience (Generally Available)**

Removed a release note because it duplicated information in another release note.

## February 26, 2024

**Speed Identity Resolution with More Frequent Ruleset Processing**

Added a release note about ruleset processing frequency.

**Improve Identity Resolution Match Rules with Fuzzy Matching**

Added a release note about expanded fuzzy matching.

**Match on OTT Contact Points in Identity Resolution**

Added a release note about OTT contact point matching.

**Identify Speakers on Mono Calls**

Added a release note about improved speaker identification on mono calls for Einstein Conversation Insights.

**Use Einstein Conversation Insights with Microsoft Teams and Google Meet**

Updated information about the availability date for Google Meet.

**Get 10 Einstein Conversation Insights Licenses with Enterprise Edition**

Updated information about the availability date for the feature.

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

Added information about five new object permissions.

**Simplify Daily Tasks with Prompt Builder (Generally Available)**

Added a release note for Prompt Builder (generally available).

**Enterprise Edition Support and New Name for Service Cloud Einstein Add-On License**

Added a release note about changes to the Service Cloud Einstein add-on license.

**Editions Support for Einstein Generative AI**

Added a release note about additional supported editions.

**Provide Data to Einstein with Template-Triggered Prompt Flows**

Added a release note to announce a new type of flow in Flow Builder.

**Metadata API**

Added release notes to announce a new process type that integrates with Prompt Builder, a new field on the FlowStart subtype for specifying a capability in flows, and a new trigger type value for a capability.

**Provide Data to Einstein with Invocable Actions**

Added a release note to announce a new modifier for Apex methods that use the InvocableMethod annotation.

**New and Changed Objects**

Added release notes to announce a new flow process type that integrates with Prompt Builder, a new field for specifying a capability in flows, and a new flow trigger type value for a capability.

**Tooling API New and Changed Objects**

Added a release note to announce a new process type that integrates with Prompt Builder.

**New Connect REST API Resource in Education Cloud**

Added a release note to announce a new resource that's available with Education Cloud.

**Find Records More Efficiently When Restoring Backups**

Added a release note about new filter options in the Salesforce Backup managed package.

**More Salesforce Orgs Are Eligible for Activity 360 Reporting**

Announced updated prerequisites for Activity 360 Reporting.

**Allow the New Setup Domain to Ensure Access to Salesforce Setup Pages**

Removed the reference to Salesforce Classic because the change applies only to Lightning Experience.

**New Metadata API Types**

Added release notes to announce new metadata types that are available with Prompt Builder.

**New Connect REST API Items**

Added a release note to announce a new Einstein resource that is available with Prompt Builder.

**New ConnectApi (Connect in Apex) Classes**

Added a release note to announce the new `ConnectApi.EinsteinLLM` Apex class that is available with Prompt Builder.

**New Invocable Action**

Added a release note to announce the new `generatePromptResponse` action.

**New and Changed Connect REST API Resources**

Added a release note about the new Save Payment Method Token resource in Commerce.

**Power Generative AI Using Third-Party LLMs**

Updated information about Model Playground and Prompt Builder.

## February 19, 2024

**Get a Full View of Account Health with the Account Intelligence View**

Added information about the release rollout.

**Einstein Classification and Work Summaries**

Change section title to include Work Summaries.

**Use Work Summaries for Chat in More Languages**

Add that the multi-lang Work Summaries applies to LiveChat channels specifically.

**Changed Connect REST API Request Bodies**

Added a release note about the new `isExpress` and `isShippingAvailable` properties that were added to the Payments Intents Input of the Payment Intents API.

**Marketing Cloud**

Added new section of release notes for the generally available Marketing Cloud product.

**Update Your Content Security Policy (CSP) for Upcoming Changes**

The changes to system-defined trusted URLs are delayed from Summer '24 to Winter '25.

**Metadata API**

Added information about the `allowExpandedColumns` field on the existing `ForecastingSettings` metadata type.

**Create From Lookup Changes**

Added information about the release rollout.

**Return to the Record Page with Record Create on Custom Quick Actions**

Added information about the release rollout.

**Make Callouts After Rolling Back DML and Releasing Savepoints**

Added information on limits considerations with setting savepoints.

**Gamification Mobile SDK**

Added a release note for the new Gamification Mobile SDK for Android and iOS.

**Einstein for Feedback Management**

Added release notes about generative AI surveys.

**New Connect REST API Resources in Quote and Order Capture**

Announced the new resources available with Quote and Order Capture.

**Expanded Data Cloud Availability**

Added a release note about Data Cloud availability in some geographical locations.

**New and Changed Connect REST API Resources**

Added a release note about the new Payment Activity Timeline resource in Commerce.

**Changed Connect REST API Request Bodies**

Announced the new `doesConsiderNullValue` property that's added to the Decision Table Definition Input of the Decision Table Definitions API.

**Changed Connect REST API Response Bodies**

Announced the new `doesConsiderNullValue` property that's added to the Decision Table Definition Output of the Decision Table Definitions API.

**Changed Connect REST API Request Bodies**

Added a release note about the new `appointmentMode` and `attendeeLimit` properties that were added to the Service Appointment Input of the Service Appointments API.

**Use Enhanced Omni-Channel in Apps with Standard Navigation**

Added that Messaging isn't supported by Omni-Channel in apps with standard navigation.

**View and Set Forecasts with Forecast Groups**

Added that you can select up to 50 values from a custom picklist that's used to group a forecast.

**Wait for Engagement Events in Segment-Triggered Flows with the Wait Until Event Element**

Added a release note about the new Wait Until Event element in Flow Builder.

**Supercharge Your Visualizations with Images, Rich Text, and Dashboard Widgets in All Salesforce Editions**

Corrected limit of image widgets from 2 to 3.

**Resolve and Deflect Issues with Einstein Search Answers (Generally Available)**

Revised the release note to update Salesforce editions and SKUs.

**Unify Your Organizational Knowledge Across Sources in Salesforce (Beta)**

Added online help links to the release note.

**Upgrade to Identity Connect 7.1.6**

Added a release note about the new recommendation to use Identity Connect 7.1.6.

**Discovery Framework**

Added release notes about designating assessment questions to prefill, saving assessments as drafts, and changed objects associated with Discovery Framework.

**Unlock the Power of AI with Einstein Studio**

Updated release note image that displays different models in Einstein Studio.

**Drive Hyper-Personalization Using Databricks Models**

Added a new image that displays how to connect a Databricks model and brief information about how to connect the model.

## February 12, 2024

**Removed: Efficiently Plan Routes and Tours**

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

**Get More Functionality with the New Dashboard Lightning Web Component (Beta)**

Updated the display name of the beta LWC CRM Analytics Dashboard component in Lightning App Builder.

**New Connect REST API Resources**

Announced the Connect REST API resources available with Salesforce Pricing.

**New Invocable Actions in Quote and Order Capture**

Announced the new createOrderFromQuote invocable action.

**New Metadata Types in Quote and Order Capture**

Announced the new createOrderFromQuote actionType field value.

**Evaluate Dynamic Formulas in Apex (Developer Preview)**

Added information that context type must be a global, user-defined Apex class.

**Use Einstein Conversation Insights with Microsoft Teams and Google Meet**

Clarified that Google Meet integration is available in late February.

**Improve Page Performance with Displayable Product Fields (Beta)**

Clarified that this feature is in Beta.

**Manage Provider Contracts with Provider Network Management**

Added a release note about Provider Network Management.

**Search Stores with Automatic SKU Detection (Pilot)**

Added that Commerce Search only searches for the Product SKU and Product Code fields to ensure that the results include exact SKU matches.

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

Corrected the enforcement date from Spring '24 to Spring '25.



## February 5, 2024

### Revenue Lifecycle Management

Announced new end-to-end revenue solution built on the power of the Salesforce platform.

### Render Components in Native Shadow with Mixed Shadow Mode (Beta)

Updated the note about the `shadowSupportMode` property.

### Use Dynamic Forms on Pinned Region Pages

Announced the availability of Dynamic Forms on pages that use pinned region templates.

### New Connect REST API Resources in Health Cloud

Added a release note about the new Book Slot Chain and Guest Referral Connect REST APIs in Health Cloud.

### Add Streaming and Batch Data Transforms to a Data Kit

Updated the release note with the ability to add a batch data transform to a data kit.

### Add Ingestion API Data Streams to a Data Kit

Added a release note about the ability to add a data stream based on an Ingestion API connector to a data kit.

### Trigger Recipes to Run When an External Connection Syncs or a CSV Uploads

This feature is generally available in Spring '24, not beta. Updated the content to remove the beta tag.

### Removed: Fine-Tune Your Segment with New Boolean Expressions

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

### Removed: Use Status-Based Capacity with Messaging (Beta)

This feature has been changed from a beta to a closed pilot and is not generally available.

### Removed: Pause Messaging Sessions with Omni-Channel Status-Based Capacity (Beta)

Status-based capacity for Messaging has been moved from a beta to a closed pilot, so the Paused status is not available for Messaging.

### Experience Better Performance with Service Appointment List Filtering (Beta)

Corrected the How section of the release note.

### Improve Dining Experience With Loyalty Management Restaurant POS

Added a release note to introduce Loyalty Management integration with Restaurant POS.

### Build Your Own Predictive AI Models

Updated see also link to help article.

### Power Generative AI Using Third-Party LLMs

Updated see also link to help article.

### Resolve and Deflect Issues with Einstein Search Answers (Generally Available)

Revised the release note to update when the feature rolls out and that the pilot program is extended to the end of March.

### Experience Improved Performance on More Record Home Pages

Updated the statement about the objects that are not LWC-enabled.

## January 29, 2024

### Ensure Users Can Access OrderToAsset and OrderItemToAsset Platform Events

Added a release note that users who subscribe to the `CreateAssetOrderEvent` and `CreateAssetOrderDtlEvent` events in Subscription Management must update their user permissions to continue to receive event notifications.

### Preview Content in Enhanced CMS Workspaces on page 639

Updated a release note to clarify that preview is available only for news, image, and content types in enhanced CMS workspaces.

**New and Changed Objects**

Added information about the new `CapacityLimitRelaxation` field on the existing `WorkCapacityLimit` and `WorkCapacity` objects.

Added information about the new `ConsumptionToLimitRatio` field on the existing `WorkCapacityUsage` object.

Added information about the new `OriginalLimit` field on the existing `WorkCapacityUsage` object.

**Use Work Summaries for Chat in More Languages**

Update channel availability for work summaries multi-language GA announcement. Live chat only.

**Update Sharing Settings for the Operating Hours Object**

Clarified information about sharing settings for Operating Hours.

**Unlock the Power of AI with Einstein Studio**

Clarified usage.

**New Connect REST API Resources in Health Cloud**

Added a release note about the new Work Type Lead Time connect REST API in Health Cloud.

**Salesforce Ant Migration Tool End of Life**

Clarified that the Ant Migration Tool is the Salesforce Ant Migration Tool.

**Cart Calculate API Enabled for New Webstores**

Added a release note that the Cart Calculate API is enabled by default for new stores.

**Record Access Is Secure by Default after Enabling Digital Experiences**

Added a release note about changes to roles after you enable digital experiences in Salesforce orgs created on February 8, 2024 or later.

**Uncover Answers to Business Questions with Data Cloud Reports**

Added a release note about accessing Data Cloud reports on mobile devices.

**Back Up New Data On Demand**

Added a release note about on-demand backup functionality.

**Control Formula Field Data Backups at the Object Level**

Added a release note about changes to how you enable formula field backups.

**Back Up Files and Attachments**

Added a release note about backing up files and attachments.

**Allow the New Setup Domain to Ensure Access to Salesforce Setup Pages**

Clarified that the allowlist refers to a company's list of allowed domains, including domains that serve Salesforce content. Added information about the rollout timeline for sandbox and production orgs.

**Streamline Wealth Management Services with Prebuilt Service Processes**

Added a release note announcing the availability of new wealth management service processes for Financial Services Cloud.

**PublicSectrStIn Namespace**

Added a release note about the availability of the new `CreateOutboundReferral` Apex class in the `PublicSectrStIn` namespace.

**Medication Review and Medication Management Enhancements and Updates**

Added a release note about the updates made to Health Cloud Medication Management.

**Handle Callbacks Asynchronously in Apex**

Changed a release note to specify Apex client maximum wait time to "twenty-four hours" instead of "up to a year or beyond".

## January 22, 2024

### Revenue

Added release notes for Salesforce CPQ, Salesforce Billing, and Subscription Management.

### Return to the Record Page with Record Create on Custom Quick Actions

Added a release note about a change to post-save navigation in quick actions.

### Add Streaming Data Transforms to a Data Kit

Added a release note about the ability to add a streaming data transform to a data kit.

### Interact with NFC Tags on a Mobile Device

Added a release note about creating a Lightning web component to interact with NFC tags.

### Scan Documents on a Mobile Device

Added a release note about creating a Lightning web component to scan documents.

### Removed: Help Partners Streamline Communication with Personalized Sales Emails

Einstein Sales Emails is not available in Experience Cloud sites at this time.

### Streamline Management of Your Dashboards With Bulk Selection

Corrected a button label and current bulk actions.

### New and Changed Objects

Added a release note about updates to the ConnectedApplication object.

### Automatically Style a Store to Match Your Brand

Added a release note about using the branding feature to automatically design a store to match your brand.

### Cloud Security Website Retirement

Added a release note about the retirement of <https://security.my.salesforce-sites.com/>.

### Resolve and Deflect Issues with Einstein Search Answers (Generally Available)

Updated the release note to include details on when the feature will be available. Added clarification that the feature supports English-only articles.

### Monitor Component Events with Custom Component Instrumentation API (Generally Available)

Corrected an error in the code sample.

### Save Dashboard Views on Your iOS Devices

Revised the steps to save a view.

### Save Dashboard Views on Your Android Devices

Revised the steps to save a view.

## January 16, 2024

### Create From Lookup Changes

Added a release note to announce a change when you create a record via a lookup field in production orgs.

### Bulk API 2.0

Added a release note about improved Bulk API 2.0 query processing. Although this release note previously appeared in the Winter '24 release notes, it wasn't ready for showtime. This improvement is now live in Spring '24.

### Removed: Get Faster Segment Counts with Approximate Segment Population (Beta)

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

### Changed Business Rules Engine Tooling API Objects

Added a release note about the new field on the existing ExplainabilityMsgTemplate object.

**Connect to Databricks (Generally Available)**

Added a release note about the Databricks Connectors becoming Generally Available.

**Control Your Data Prep Concurrency Allocation**

Added a section to the release note that users must have the CRM Analytics Plus license assigned to allocate job concurrency.

**Metadata API**

Added release note about the updates to the EmbeddedServiceConfig metadata type.

**Address Your Users' Connection Issues Quickly by Seeing Org ID and Username in Notifications**

Announced the addition of the org ID and username to the connection status email notification.

**Unify Your Organizational Knowledge Across Sources in Salesforce (Beta)**

Added when Unified Knowledge is available in production and preview sandbox orgs.

**Save Assessments as Drafts to Complete Later**

Corrected the name of the **Save for later** button, added information about who can use the feature and how to configure it, and added links to relevant topics in the Administer Health Cloud guide.

**View and Manage All Patient Assessments in One Place**

Added information about who can use the feature.

**Improve Patient Experiences with Prefilled Assessments**

Updated information about who can use the feature.

**Give Patients a Complete View of Their Assessments**

Updated information about who can use the feature.

**Open Completed Assessments in View Mode**

Removed an incorrect topic link.

**Coordinate Care for Referred Patients**

Added information about who can use the feature and updated a link to a relevant topic in the Health Cloud Developer Guide.

**Focus on Key Referral Metrics to Improve Efficiency**

Updated information about who can use the feature.

**Health Cloud Has New and Changed Objects**

Removed information about the `IsPrefill` field in the `OmniProcessAsmtQuestionVer` object, and added links to relevant topics in the Health Cloud Developer Guide.

**New Connect REST API Resources in Loyalty Management**

Announced the new gamification and unified promotions connect REST APIs in Loyalty Management.

**Removed: Test Configurations with the Apache HTTP Client Library Updates for Named Credential Callouts**

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

**New and Changed Connect in Apex Classes**

Added release notes about two new Data Cloud methods in the `ConnectApi.CdpSegment` class.

**Changed Connect in Apex Output Classes**

Added a release note about a new property and an existing superclass that were added to the Data Cloud `ConnectApi.CdpSegmentActionOutput` output class.

**Work with Expression Sets Efficiently with the Enhanced Expression Set Builder**

Added a release note to announce Expression Set Builder enhancements.

**Removed: Reveal Actionable Data with Summary Filters in Lightning Reports (Beta)**

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

**Encrypt Applicant and Application Form Fields**

Added a release note to announce encrypt Applicant and Application Form fields.

**Create Care Plans Using Care Plan Templates**

Added a release note about creating care plans using care plan templates.

**Encrypt Nonprofit Cloud Payment Information**

Added the Expiry Month, Expiry Year, and Last 4 fields.

**Removed: Stay Productive When Networks Are Down**

This feature addresses very specific use cases, and isn't intended for long-term or common use.

**New and Changed Objects**

Added information announcing new Enablement objects. Also, added release notes about updates to existing EnablementProgram and LearningItemAssignment objects.

**Other Changes in Enablement**

Added information announcing new No Longer Tracking and Overdue completion status values for programs, milestones, and exercises. (The NoLongerTracking status doesn't apply to exercises.)

**Encrypt Fields Used to Train Generative AI Models**

Added a release note about natural language processing data that can be encrypted with Shield Platform Encryption.

**Compress and Extract Zip Files in Apex (Developer Preview)**

Modified sample code and corrected the feature perm information.

## January 9, 2023

**Removed: Revenue Cloud release notes**

Removed some Revenue Cloud release notes.

## January 8, 2024

**Receive Change Event Notifications for More Objects**

Removed ProviderSearchSyncLog from the list of objects you can receive change event notifications for. This object is for internal use only.

**See More Activities Dashboards in One Place**

Added a topic about accessing Activities Analytics and Activity 360 dashboards from the Activities Dashboard tab.

**Confirmation Message When You Select the Multi-Select Picklist Field Type**

Added a release note about the new multi-select picklist confirmation message.

**New and Changed Connect REST API Resources**

Added a release note about two Data Cloud Connect API segment deactivation resources.

**New and Changed Data Model Objects**

Added a new release notes topic for new and changed data model objects (DMOs).

**New and Changed Data Model Objects**

Added release notes about new fields on the existing Flow Element Run DMO and Flow Run DMO.

**Auto-End Enhanced Messaging Sessions After No Response**

Added a release note about a change to the messaging session lifecycle.

**Create Custom Report Types for More Objects**

Added a release note about Health Cloud objects now supported for custom report types.

**Update Sharing Settings for the Operating Hours Object**

Added a release note about manual updates required for the Operating Hours object.

**New Object in Timeline**

Added a release note about the new TimelineObjectDefinitionLocalization object.

## January 5, 2024

**Experience Improved Performance on More Record Home Pages**

Clarified that the LWC-enabled entities don't apply to the Field Service mobile app.

**Create More Efficient Queries with Semi-Joins and Anti-Joins (Generally Available)**

Added Release Note for Semi-Joins and Anti-Joins becoming Generally Available.

**Use the Null Coalescing Operator**

Fixed error in sample code.

**Evaluate Dynamic Formulas in Apex (Developer Preview)**

Clarified the advantages of using the new formula classes.

**Einstein Conversation Insights**

Added release notes about additional language support and dashboard improvements.

**Prioritize Selling with More Pipeline Insights and Actions**

Removed Developer Edition from the list of supported editions.

**Sharpen Selling Decisions with a Consolidated View of Insights on Contacts or Leads**

Removed Developer Edition from the list of supported editions.

**See Which Contacts are Engaging and View Insights and See Which Leads are Engaging and View Insights**

Clarified that activity metrics now include events as well as tasks.

**Transaction Dispute Management**

Added Release Notes for Transaction Dispute Management enhancements.

**New and Changed Standard Platform Events**

Added a Release Note for the OmniTrackingEvent platform event.

**Improve Security of Your Financial Account Data with Shield Platform Encryption**

Added a release note to announce field encryption updates for Financial Account in the Automotive Cloud section.

**Encrypt Financial Account Name and Number in Automotive Cloud**

Added a release note to announce field encryption updates for Financial Account in the Security section.

## December 21, 2023

**Removed: Marketing Cloud release notes**

Removed some Marketing Cloud release notes.

## December 18, 2023

**Salesforce Spring '24 Release Notes**

Published preview release notes.

## How and When Do Features Become Available?

Some features in Spring '24 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="#">Get Core Major Releases with No Downtime</a>	✓			
<a href="#">Allow the New Setup Domain to Ensure Access to Salesforce Setup Pages (not immediately available)</a>	✓			
<a href="#">Temporarily Opt Out of Google Chrome Storage Partitioning</a>		✓		
<a href="#">MFA Enforcement for Salesforce Orgs Is Shifting to In-App Notifications Starting in Summer '24</a>			✓	
<a href="#">MFA Is Turned On by Default Starting April 2024</a>			✓	
<a href="#">Experience Improved Performance on More Record Home Pages</a>			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<a href="#">Create From Lookup Changes (not immediately available)</a>			✓	
<a href="#">Upgrade from Starter to Pro Suite in Your Account</a>	✓			
<a href="#">Find Transactions Faster with the Your Account Home Page</a>	✓			
<b>Salesforce Scheduler</b>				
<a href="#">Optimize Resource Management by Reassigning Multiple Service Appointments</a>			✓	
<a href="#">Optimize Appointments by Using Concurrency in Shifts</a>			✓	
<a href="#">Troubleshoot Setup and Appointment Scheduling Issues</a>			✓	
<a href="#">Other Changes to Salesforce Scheduler</a>			✓	
<a href="#">Changed Connect REST API Request Bodies</a>		✓		
<a href="#">Changed Connect in Apex Input Class</a>		✓		
<b>Einstein Search</b>				
<a href="#">Resolve and Deflect Issues with Einstein Search Answers (Generally Available)</a>		✓		
<a href="#">Einstein Search Is Enabled by Default</a>		✓		
<a href="#">Define Rules to Filter Search Results Shown to End Users (Beta)</a>		✓		
<a href="#">Customize the Search Experience for Global Search, LWR Experience Sites, and the Lightning Knowledge Component (Beta)</a>		✓		
<b>Salesforce Data Pipelines</b>				
<a href="#">Visualize Hierarchies and Flatten Transformations with Preview in the Recipe Editor</a>	✓			
<a href="#">Audit Details of Running and Canceled Data Prep Jobs</a>	✓			



Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<a href="#">Get More Usage Information in Data Manager</a>	✓			
<a href="#">Trigger Recipes to Run When an External Connection Syncs or a CSV Uploads</a>	✓			
<a href="#">Experience Better Recipe Error Messaging and Reliability</a>	✓			
<a href="#">Connect to Amazon Athena (Generally Available)</a>	✓			
<a href="#">Connect to Databricks (Generally Available)</a>	✓			
<a href="#">Trust Site Enhancements</a>	✓			

## Analytics

Analytics enhancements include new and updated features for Lightning reports and dashboards, Data Cloud reports and dashboards, CRM Analytics, Intelligent apps, and Tableau.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<b>Unified Analytics Experiences</b>				
<a href="#">Control Your Report and Dashboard Sharing from the Analytics Tab</a>	✓			
<a href="#">Streamline Management of Your Dashboards With Bulk Selection</a>	✓			
<b>Analytics on Mobile</b>				
<a href="#">Save Dashboard Views on Your iOS Devices</a>	✓			
<a href="#">Save Dashboard Views on Your Android Devices</a>	✓			
<b>Lightning Reports and Dashboards</b>				
<a href="#">Transfer Lightning Dashboard Ownership (Generally Available)</a>			✓	
<a href="#">Supercharge Your Visualizations with Images, Rich Text, and Dashboard Widgets in All Salesforce Editions</a>			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<b>Focus Your View with More Dashboard Filters in All Salesforce Editions</b>			✓	
<b>Easily Update Fields in Lightning Report Filters</b>			✓	
<b>Rearrange Multiple Lightning Report Columns at Once</b>			✓	
<b>Filter Report Types by Objects or Fields in Enterprise and Performance Editions</b>			✓	
<b>Access Report and Dashboard Subscriptions with Slack Slash Commands</b>	✓			
<b>Data Cloud Reports and Dashboards</b>				
<b>Analyze Calculated Insights in Data Cloud Reports</b>	✓			
<b>Tailor Reports on Data Model Objects with Custom Report Types</b>	✓			
<b>Discover Trends over Time Using Standard Fiscal Calendar Options</b>			✓	
<b>Easily Categorize Data Cloud Records with Bucket Columns</b>	✓			
<b>Perform Calculations Using Functions and Formulas</b>	✓			
<b>CRM Analytics</b>				
<b>Analytics Experience and Visualizations</b>				
Get Improved Dashboard Performance with Better Caching	✓			
Download Metadata from Lenses and Widgets	✓			
Embed CRM Analytics Dashboards in LWR Sites (Beta)	✓			
Get More Functionality with the New Dashboard Lightning Web Component (Beta)	✓			
Create More Efficient Queries with Semi-Joins and Anti-Joins (Generally Available)	✓			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<b>Data Integration</b>				
Visualize Hierarchies and Flatten Transformations with Preview in the Recipe Editor	✓			
Control Your Data Prep Concurrency Allocation			✓	
Audit Details of Running and Canceled Data Prep Jobs	✓			
Get More Usage Information in Data Manager	✓			
Trigger Recipes to Run When an External Connection Syncs or a CSV Uploads	✓			
Experience Better Recipe Error Messaging and Reliability	✓			
Append Data Faster with Incremental Uploads (Generally Available)	✓			
Connect to Amazon Athena (Generally Available)	✓			
Connect to Databricks (Generally Available)	✓			
<b>Intelligent Analytics Apps</b>				
<b>Tableau</b>				
<b>Embed Tableau Pulse Data in Lightning Pages</b>	✓			
<b>Tableau Release Notes</b>	✓			
<b>Marketing Cloud Intelligence</b>	✓			

## 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>				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<b>Commerce Einstein</b>				
Improve Store Performance with Goals and Recommendations	✓			
Optimize Your Customers' Shopping Experience with the Commerce Concierge Bot		✓		
Create Smart Promotions with Einstein				✓
Create SEO Metadata for Products from Goals and Recommendations			✓	
Boost SEO with Einstein for Page Meta Tags			✓	
Decrease Return Rates with Einstein Return Insights	✓			
Bring Products to Customers with AI-Powered Search (Generally Available)			✓	
<b>Commerce Easy Set Up</b>				
Use Store Setup Tasks to Start Selling Fast	✓			
Easily Set Up Guest Access	✓			
Specify Locale Settings During Store Creation	✓			
Assign a CMS Public Channel to a Store	✓			
Collect Tax Globally with Salesforce Tax (Pilot)				✓
<b>Commerce Cart, Checkout, and Promotions</b>				
Let Guests Log In Without Emptying Their Carts	✓			
Split an Order to Ship to Multiple Locations			✓	
Fulfill an Order from Multiple Locations	✓			
Promote Larger Purchases				✓
Set Coupon Redemption Limits	✓			
Customize Promotions with Conditional Rules	✓			
Cart Calculate API Enabled for New Webstores	✓			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<b>Commerce Search and SEO</b>				
Search Stores with Automatic SKU Detection (Pilot)			✓	
Improve Search Results with Product Image Structured Data			✓	
<b>Commerce Reorder Portal</b>				
Customize Emails in a Reorder Portal Invitation Cadence			✓	
Display Purchased Products on the Reorder Portal Home Page			✓	
Invite Contacts to a Reorder Portal with a Quick Cadence			✓	
<b>Commerce Components</b>				
Create Multiple Variations of a Component to Target Customers	✓			
Add Express Checkout to Your Cart and Checkout Pages			✓	
Let Customers Know When There Are No Search Results			✓	
<b>Additional Commerce Features</b>				
Welcome Business Accounts to D2C Commerce	✓			
Offer and Manage Subscriptions in Your B2B and D2C Store (Beta)			✓	
Set Up Self-Registration for B2B Stores			✓	
Easily Select an Inventory Service for Your Commerce Store	✓			
Reduce Shipping Costs and Integration Times with Native Shipping			✓	
Update Product Categories in Bulk with a Category Import			✓	
Analyze Commerce Metrics with the Business Overview Dashboard			✓	
Improve Page Performance with Displayable Product Fields (Beta)			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Automatically Style a Store to Match Your Brand	✓			
<b>Omnichannel Inventory</b>				
View If Shipping Is Disabled for a Product	✓			
<b>Salesforce Order Management</b>				
Place Orders on Behalf Of Guest Shoppers	✓			
Simplify Order Creation with the High Scale Order Integration	✓			
Provide Exchanges for Fulfilled Items	✓			
Provide More Product Information with the Order Management Product Selector Component	✓			
Order Management Flow Type Field Has a New Name	✓			
<b>Salesforce Payments</b>				
Expand Pay Now Checkout with Subscriptions and Tax and Shipping Options			✓	
Sell Subscriptions Through Pay Now			✓	
Automate Payment Link Creation Using Flow Builder			✓	
Register and Log In Customers with One-Click Checkout			✓	
Make Pay Now Transactions Easier with Express Payments (Generally Available)			✓	
Extend How Customers Manage Payment Methods from My Account			✓	
Accept Pay Now Payments Using a QR Code			✓	

## Customization

Give record page users more of what they need where and when they need it with enhancements to Dynamic Forms-enabled Lightning pages. Access invoice, payment, shipment, and return data in Snowflake more easily using Salesforce Connect adapter for SQL.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<b>Lightning App Builder</b>				
IdeaExchange Delivered: Add Fields from Related Objects to Dynamic Forms-Enabled Pages		✔		
Set Field Visibility by Device in Dynamic Forms		✔		
IdeaExchange Delivered: Use Dynamic Actions with Standard Objects on Mobile			✔	
Dynamic Forms on Mobile Is Enabled by Default in New Orgs		✔		
IdeaExchange Delivered: Translate the Related List Label in the Dynamic Related List - Single Component		✔		
See a Field's Object Relationship and API Name in Dynamic Forms		✔		
Use Dynamic Forms on Pinned Region Pages		✔		
Preview Mobile Actions on Record Pages Before Activating		✔		
Create a Custom Omni Supervisor Page		✔		
<b>Salesforce Connect</b>				
Salesforce Connect Adapter for Amazon Athena Is Now Salesforce Connect Adapter for SQL		✔		
Connect Securely to Snowflake and Perform Interactive Queries from Salesforce			✔	
<b>Sharing</b>				
Update Organization-Wide Defaults Faster (not immediately available)		✔		
Enable Faster Account Sharing Recalculation by Not Storing Opportunity Implicit Child Shares (Release Update) (not immediately available)			✔	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<b>Permissions</b>				
Use Permission Set Groups in All Editions		✓		
Get Notified Before Deleting Permission Sets Assigned to Users		✓		
Reference Picklists, Groups, and Queues in User Access Policies (Beta)			✓	
<b>Globalization</b>				
Enable ICU Locale Formats (Release Update)		✓		
Present Your Custom Functionality in English (Italy) and Three Mayan Platform-Only Languages	✓			
Changed CustomObjectTranslation and ValueSetTranslations Behavior	✓			
Evaluate the Impact of the Latest ICU Locale Updates	✓			
Review Updated Label Translations	✓			
<b>Fields</b>				
IdeaExchange Delivered: Confirmation Message When You Select the Multi-Select Picklist Field Type		✓		
<b>AppExchange</b>				
Explore AppExchange Solutions Based on Your Interests	✓			
Navigate AppExchange More Efficiently	✓			
<b>General Setup</b>				
Get a Natural-Language Explanation of Your Formulas		✓		
Handle Callbacks Asynchronously in Apex		✓		
Enforce View Roles and Role Hierarchy Permission When Editing Public List View Visibility (Release Update)			✓	



Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<a href="#">Remove Updates to Most Recently Used Items to Improve API Performance</a>		✓		
<a href="#">See Required Fields at a Glance on Dynamic Forms-Enabled Page Views</a>		✓		
<a href="#">Large Images No Longer Run Off the Page in Record Printable View</a>	✓			
<a href="#">Get Improved Accessibility in List Views</a>	✓			

## Data Cloud

Ingest, harmonize, unify, and analyze streaming and batch data with Data Cloud. Then use that data to unlock meaningful and intelligent experiences across Customer 360 applications and beyond.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<b>AI in Data Cloud</b>				
<a href="#">Build Your Own Predictive AI Models</a>		✓		
<a href="#">Unlock the Power of AI with Einstein Studio</a>		✓		
<a href="#">Power Generative AI Using Third-Party LLMs</a>		✓		
<a href="#">Drive Hyper-Personalization Using Databricks Models</a>		✓		
<a href="#">Enrich Your Batch Data Transforms Using AI Models</a>		✓		
<a href="#">Get Predictions from Your AI Models</a>		✓		
<a href="#">Retrieve Your Customer 360 Data in Near Real Time with Data Graphs</a>		✓		
<a href="#">Query Data Graphs for Metadata and Data Using the Data Graphs APIs</a>		✓		
<a href="#">Experience a Streamlined Enablement for Data Cloud</a>		✓		
<a href="#">Create Google Cloud Storage Data Streams More Easily with the New Connector</a>			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Create SQL Queries with Query Editor			✓	
Extend Data Cloud Objects to Snowflake Accounts Across AWS Regions and Public Clouds			✓	
Share Data in Near Real Time Between Data Cloud and Google BigQuery			✓	
Build Engaging Messaging Experiences Using WhatsApp Data in Data Cloud			✓	
Include More Complex Data in Batch Data Transforms	✓			
Expand Date Ranges in Batch Data Transforms	✓			
Add Streaming and Batch Data Transforms to a Data Kit	✓			
Add Ingestion API Data Streams to a Data Kit	✓			
Create a Data Kit with More Connection Options	✓			
Build Data Cloud Apps Using Second-Generation Managed Packaging		✓		
Add New Connectors to Ingest Data Into Data Cloud (Beta)	✓			
Ingest Data from Kinesis Data Streams into Data Cloud with the Amazon Kinesis Connector (Generally Available)	✓			
Bring PostgreSQL Database Data into Data Cloud with the Heroku PostgreSQL Connector	✓			
Create S3 Data Streams More Easily with the New Amazon S3 Connector			✓	
Package Web and Mobile Data Streams in a Data Kit	✓			
Do More with New Data Types in Data Cloud			✓	
Consume Native Salesforce Data Cloud Objects in Tableau Catalog	✓			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Send Segments Created in Tableau Cloud to Data Cloud	✓			
Reach the Right Audiences with Einstein Segment Creation			✓	
Fine-Tune Your Segment with New Boolean Expressions	✓			
Get insights on Segment Performance with Segment Intelligence			✓	
Analyze Customer Segment Data with Amazon Insights	✓			
Activate Audiences to Google DV360	✓			
Activate Audiences to LinkedIn	✓			
Activate Audiences to SnapChat	✓			
Refresh Segments Incrementally for Ecosystem Partners	✓			
Activate Segments Within Data Cloud Through the Audience DMO	✓			
Manage B2C Communications Using Capping Control (Pilot)	✓			
Expand Your Reach Using the WhatsApp Channel	✓			
Create Segments with Unified Data Model Objects and Activate on Non-Unified Data Model Objects	✓			
Connect a Data Space to an Activation Target	✓			
Create an Activation Target for B2C Commerce and Marketing Cloud Personalization	✓			
Apply Filters to Contact Points and the Activation Membership (Pilot)	✓			
Speed Identity Resolution with More Frequent Ruleset Processing			✓	
Improve Identity Resolution Match Rules with Fuzzy Matching			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<a href="#">Match on OTT Contact Points in Identity Resolution</a>			✓	
<a href="#">Add New Object Permissions to Custom Permission Sets in Data Cloud</a>			✓	
<a href="#">Quickly Find Data Cloud Connect API Reference Information</a>	✓			
<a href="#">Control Your Data Model By Changing DMO Category</a>	✓			
<a href="#">Know the Statistics of a Data Lake Object with the New Refresh History Tab</a>			✓	
<a href="#">Expanded Data Cloud Availability</a>			✓	
<a href="#">Build Strong Data Foundations with BYOL Data Federation</a>			✓	
<a href="#">Refine Access with Data Spaces Feature Permissions</a>			✓	
<b>Cross Cloud Updates for Data Cloud</b>				
<a href="#">Use a Key Qualifier for Copy Field Enrichments</a>			✓	
<a href="#">View Sync History for Copy Field Enrichments</a>			✓	
<a href="#">Create Related List Enrichments More Easily</a>			✓	

## Deployment

Check out what's new in deployment.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<a href="#">Salesforce Ant Migration Tool End of Life</a>				

## Development

Whether you're using Lightning components, Visualforce, Apex, or Salesforce 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
<b>Lightning Components</b>				
<b>Get the Latest LWC Changes with LWC API Version 60.0</b>				
Empty Comment Nodes Replace Empty Text Nodes		✓		
Light DOM Renders Additional Whitespace Characters		✓		
Decorators Throw a Syntax Error in Non-LightningElement classes		✓		
Object Rest and Spread Transpilation Is Removed		✓		
<b>Control Workspace Tabs and Subtabs (Generally Available)</b>		✓		
<b>Search for Records with the Lightning Record Picker Component (Generally Available)</b>		✓		
<b>Render Components in Native Shadow with Mixed Shadow Mode (Beta)</b>		✓		
<b>Migrate LWC Projects from LWC.studio to StackBlitz</b>		✓		
<b>ARIA Property Reflection Available For More Attributes</b>		✓		
<b>API Distortion Changes in Lightning Web Security</b>			✓	
<b>LWS Automatically Uses Closed Shadow Root Mode</b>			✓	
<b>Monitor Component Events with Custom Component Instrumentation API (Generally Available)</b>			✓	
<b>Be Aware of Base Component lightning-input Internal DOM Structure Changes</b>		✓		
<b>Be Aware of Base Lightning Component Internal DOM Structure Changes for Future Native Shadow Support</b>		✓		
<b>Improved Accessibility of Base Lightning Components</b>		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<a href="#">Return to the Record Page with Record Create on Custom Quick Actions</a> (not immediately available)		✓		
<a href="#">Scan Documents on a Mobile Device</a>		✓		
<a href="#">Interact with NFC Tags on a Mobile Device</a>		✓		
<a href="#">New Features for the LWC Offline Test Harness</a>		✓		
<b>Visualforce</b>				
<a href="#">Enable JsonAccess Annotation Validation for the Visualforce JavaScript Remoting API</a> (Release Update)		✓		
<b>Apex</b>				
<a href="#">IdeaExchange Delivered: Use the Null Coalescing Operator</a>		✓		
<a href="#">IdeaExchange Delivered: Get Support for Randomly Generated UUID v4</a>		✓		
<a href="#">IdeaExchange Delivered: Make Callouts After Rolling Back DML and Releasing Savepoints</a>		✓		
<a href="#">IdeaExchange Delivered: Compress and Extract Zip Files in Apex</a> (Developer Preview)		✓		
<a href="#">IdeaExchange Delivered: Evaluate Dynamic Formulas in Apex</a> (Developer Preview)		✓		
<a href="#">Enforce RFC 7230 Validation for Apex RestResponse Headers</a> (Release Update)		✓		
<a href="#">See Improved Logging When FOR UPDATE Locks Are Released</a>		✓		
<a href="#">Changed Behavior with Type.forName Method</a>		✓		
<a href="#">Improved Validation and Limit Accounting with DML on External Objects</a>		✓		
<a href="#">New Default Quiddity Enum Value</a>		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Provide Data to Einstein with Invocable Actions			✓	
<b>API</b>				
Secure API Access with the New Least-Privilege User Profile		✓		
Control API Access to XML Deserialization of Apex Classes		✓		
Salesforce Platform API Versions 21.0 Through 30.0 Retirement (Release Update)	✓			
Deploy and Retrieve More Metadata via REST and SOAP Metadata API		✓		
Bulk API 2.0		✓		
<b>Packaging</b>				
Control Which Profile Settings Are Packaged		✓		
IdeaExchange Delivered: Remove Custom Metadata Type Records from a Second-Generation Managed Package				✓
View Orgs Eligible for a Push Upgrade		✓		
<b>Development Environments</b>				
Select Who Has Access To a Sandbox			✓	
Capture a Scratch Org's Configuration with Scratch Org Snapshots (Beta)			✓	
IdeaExchange Delivered: Log In to All Your Sandboxes from Setup		✓		
<b>Platform Development Tools</b>				
Develop Platform Apps with Ease		✓		
Deploy Scalable Apps with Scale Center		✓		
Plan and Test with Scale Test				✓
Replace Workbench With Salesforce Developer Tools		✓		
<b>Salesforce Functions</b>				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Salesforce Functions Is Being Retired				✓
<b>AppExchange Partners</b>				
UsersWithMFA Attribute Will No Longer Be Populated for Trial Orgs in Subscriber Snapshots				✓
Log Custom Interactions in AppExchange App Analytics				✓
The Cloud Security Website Is Being Retired				✓
Get More Insights About Your Customer's Discovery Journey in the Updated AppExchange Marketplace Analytics Dashboard		✓		
Associate AppExchange Leads with Marketing Campaigns, Promotions, and Other Traffic Sources	✓			
<b>Change Data Capture</b>				
IdeaExchange Delivered: Receive Change Event Notifications for More Objects		✓		
<b>Platform Events</b>				
Find Uncaught Exceptions of Platform Event Triggers in Event Log Files		✓		
Streaming API Versions 23.0 Through 36.0 Are Being Retired		✓		
<b>Event Bus</b>				
Manage Your Event Subscriptions with Pub/Sub API (Beta)		✓		
Expanded Regional Processing for the Pub/Sub API Global Endpoint		✓		
Expanded Regional Processing for Event Relays		✓		

## Einstein

Supercharge your workforce efficiency with predictive and generative AI.



Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<b>Einstein Features</b>			✓	
<b>Einstein Platform</b>				
<b>Einstein Bots</b>				
Teach Your Bot New Languages More Easily with the Cross-Lingual Intent Model (Generally Available)		✓		
Save Agents' Time with New Messaging Components for Enhanced Bots (Beta)	✓			
Send a Dynamic File with an Enhanced Bot	✓			
Translate Dialogs Easily to Different Languages (Beta)		✓		
Improve Customers' Shopping Experience with the Commerce Concierge Bot Template		✓		
Run Flows in Bot User Context (Release Update)			✓	
View Standard Bot Reports in the Spring '24 Folder		✓		
<b>Einstein Copilot</b>				
Meet Your Team's Trusted AI Assistant			✓	
Launch Your Copilot Quickly with Standard Actions			✓	
Extend Your Copilot with Custom Actions			✓	
Customize, Test, and Troubleshoot Your Copilot All In One Place			✓	
Gauge Einstein Copilot Adoption and Usability with Analytics			✓	
Welcome Users to Copilot with Recommended Contextual Actions			✓	
See a Warning if Copilot Generates Response with Toxic Language			✓	
<b>Einstein Studio in Data Cloud</b>				
<b>Einstein Trust Layer</b>				
Protect Sensitive Data with Data Masking		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Select What Data to Mask		✓		
Track Einstein Trust Layer Functionality with Audit Trail		✓		
<b>Prompt Builder</b>				
Simplify Daily Tasks with Prompt Builder (Generally Available)			✓	
<b>Other Changes</b>				
Use Multilingual Support in Einstein Generative AI		✓		
Editions Support for Einstein Generative AI		✓		
Improve Your Einstein Usage with Generative AI Audit and Feedback Data			✓	

## Experience Cloud

Discover a number of upgrades to improve your LWR and Aura sites. See all your site publication changes in Experience Builder with the Change History panel. Use improved URL configuration options to make your URLs SEO friendly and drive more traffic to your LWR sites. Improve site performance, scalability, security, and SEO with Experience Delivery (pilot), a new LWR site infrastructure. And build more personalized sites with Expression-Based Component Variations, now generally available.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<b>Aura and LWR Sites</b>				
IdeaExchange Delivered: Track Site Updates in the New Change History Panel in Experience Builder		✓		
Translate Your LWR Site into Even More Languages		✓		
Improve SEO with Custom URLs for Custom Objects (Beta)		✓		
Integrate with Data Cloud to Harness Site Data (Beta)			✓	
Configure Search Results Layouts with Search Manager (Beta)		✓		
Experience an Improved Sitemap Generation and Refresh Schedule		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Give Your LWR Site Visitors a Better Experience on Tablets with Updated Spacing Defaults		✓		
Work More Intuitively in Experience Builder with Updates to the User Interface		✓		
<b>Components in Experience Builder</b>				
Create Component Variations in Enhanced LWR Sites (Generally Available)		✓		
Use the New Tab Layout Component for Smoother Performance on Your Aura Site		✓		
Refine Your LWR Site Layout with Improved Spacing Controls in Experience Builder		✓		
Supercharge Productivity for Sales Partners from Experience Cloud Sites			✓	
<b>Developer Productivity</b>				
Dynamically Redirect Users to Sites Hosted on External Domains		✓		
Try a Modernized Record Experience in Aura Sites in Your Sandbox Environment		✓		
<b>Site Performance</b>				
Boost LWR Site Performance and Scalability with Experience Delivery (Pilot)		✓		
Update References to Your Force.com Site URLs		✓		
<b>Mobile for Experience Cloud</b>				
Update Your Mobile Publisher for Experience Cloud App's Information for Android Push Notifications		✓		
Configure Biometric ID Checks for Your Mobile Publisher for Experience Cloud App		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<b>Security and Sharing</b>				
<a href="#">Prepare for Upcoming CSP Changes</a>		✔		
<a href="#">Identity and Access Management Enhancements for Experience Cloud</a>			✔	
<a href="#">Built-In Salesforce-Managed App for the Twitter Authentication Provider Is Being Retired</a>		✔		
<a href="#">Record Access Is Secure by Default after Enabling Digital Experiences</a>		✔		
<b>Other Changes</b>				
<a href="#">Chatter Group Member Count Is Updated Only When Member Group Processing Is Complete</a>	✔			

## Field Service

See what's new in Field Service to help your team deliver on performance and customer service.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<b>Einstein</b>				
<a href="#">Get Started with Einstein Features for the Field Service Mobile App</a>			✔	
<a href="#">Streamline Everyday Activities with Einstein Copilot on the Field Service Mobile App</a>	✔			
<a href="#">Get Your Mobile Workers Up to Speed with Pre-Work Brief</a>			✔	
<b>Resource Management</b>				
<b>Enhanced Scheduling and Optimization</b>				
<a href="#">Get Additional Guidance When Transitioning to Enhanced Scheduling and Optimization</a>			✔	
<a href="#">Configure Scheduled Jobs Easily with Enhanced Optimization APIs</a>		✔		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Limit Your Mobile Worker's Cumulative Workload Throughout the Day		✓		
Fix Schedule Overlaps Easily with an Automated Scheduling Flow (Beta)			✓	
Evaluate Service Appointment Candidates Efficiently by Prioritizing Skill Preferences			✓	
<b>Work Capacity</b>				
Get More Scheduling Flexibility with Work Capacity Limit Relaxation			✓	
Update a Daily Work Capacity Limit to Meet Changing Needs	✓			
Share Work Capacity Records by Territory			✓	
Optimize Workforce Utilization by Comparing Workstream Consumption	✓			
<b>Get Notified When Automated Bundling Fails</b>			✓	
<b>Identify Configuration Issues More Efficiently with the Redesigned Health Check User Interface</b>		✓		
<b>Experience Better Performance with Service Appointment List Filtering (Beta)</b>			✓	
<b>Control User Access with Operating Hours Sharing</b>			✓	
<b>View More Shifts on the Schedule with a Minimalist Design</b>			✓	
<b>Field Service Operations</b>				
<b>Service Documents</b>				
Create Richly Formatted Service Documents with Document Builder (Generally Available)			✓	
<b>Asset Management</b>				
Save Database Storage with Optimized Storage Space for Asset Attributes		✓		
Build In Accurate Maintenance Lead Time with Asset Attributes	✓			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Accelerate Your Field Service Implementation with Data Cloud	✓			
Migrate from Maintenance Plan Frequency Fields to Maintenance Work Rules (Release Update)			✓	
<b>Customer Engagement</b>				
<b>Improve Your Data Security with Automated Visual Remote Assistant Image Deletion</b>		✓		
<b>Enhance Your Agent's Efficiency with Images in the Visual Remote Assistant's Visual History</b>	✓			
<b>Facilitate Payment for Services</b>			✓	
<b>Mobile</b>				
<b>Lightning Web Components</b>				
Customize Your Lightning Web Components with Styles		✓		
Boost Productivity with a Customized Tab Bar and the Time Sheet Tab				✓
Save Time and Improve Accuracy by Scanning Barcodes with Android Devices			✓	
Streamline Your Work by Extracting Textual Data from Images			✓	
Simplify How to Interact with Data with Near Field Communication			✓	
<b>Plan for the Discontinuation of Mobile Extension Toolkit (Beta)</b>			✓	
<b>Switch the App Language to Support Hebrew (Beta)</b>	✓			
<b>Spotlight on Field Service Content</b>				
<b>Simplify Setup Tasks with Landing Pages</b>	✓			

## Hyperforce

Hyperforce is the next-generation Salesforce infrastructure architecture built for the public cloud. It provides Salesforce applications with 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
<a href="#">Access Salesforce in More Regions with Hyperforce</a>			✓	
<a href="#">Migrate to Hyperforce with Hyperforce Assistant (Generally Available)</a>			✓	

## Industries

Industries solutions shape Salesforce to the needs of your business, reducing the need for you to customize things yourself. Streamline delivery and distribution processes and run better promotions with Consumer Goods Cloud. Create and execute financial plans with Financial Services Cloud. Health Cloud optimizes home visit scheduling and offers new ways to view, update, and create care plans. Run better promotions and boost member engagement with Loyalty Management. Net Zero Cloud streamlines disclosure management and reporting. Boost caseworker efficiency and reduce administrative burden with Public Sector Solutions. Manage mentoring programs, learning programs, and learning courses with Learning Wizard in Salesforce for Education. We also have plenty of changes for Automotive Cloud, Manufacturing Cloud, Salesforce for Nonprofits, 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>Service Excellence for Automotive Finance</b>				
<a href="#">Monitor Automotive Loans and Leases</a>			✓	
<a href="#">Help Your Captive Finance Customers with Loan and Lease Service Requests</a>			✓	
<a href="#">Visualize Relationships of Your Captive Finance Customers</a>			✓	
<a href="#">Share Captive Finance Information with Customers and Dealers</a>			✓	
<a href="#">Easily Customize the Automotive Lease and Loan Consoles Using OmniStudio</a>			✓	
<a href="#">Improve Security of Your Financial Account Data with Shield Platform Encryption</a>			✓	
<b>Fleet Management Enhancements</b>			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<a href="#">Automatically Populate Key Fields for Opportunity Products and Preferred Sellers</a>			✔	
<a href="#">Replace Deprecated Fields on Vehicle and Vehicle Definition with New Fields</a>			✔	
<a href="#">New and Updated Objects and Fields in Automotive Cloud</a>				
<b>Connect REST APIs</b>				
<a href="#">New Connect REST API Resources</a>		✔		
<b>Communications Cloud</b>				
<b>Retail Execution</b>				
<a href="#">Extend UI and Business Logic for Advanced Orders</a>	✔			
<a href="#">Get Started Quickly with Consumer Goods Cloud Offline Mobile App</a>	✔			
<a href="#">Accessibility of Operating Hours for All Users</a>	✔			
<a href="#">Optimize Store Performance in Promotions by Using Analytics Insights</a>			✔	
<a href="#">Provide Enhanced Accessibility</a>	✔			
<a href="#">New and Changed Objects in Retail Execution</a>		✔		
<b>Use the Enhanced Visual Studio Code Based Modeler CLI Commands</b>	✔			
<b>Trade Promotion Management</b>				
<a href="#">Get More Control Over Business Years and Time Periods</a>		✔		
<a href="#">Retain Consumer Goods Processing Services Data When You Clone or Refresh a Sandbox</a>		✔		
<a href="#">Customize the Trade Calendar, P&amp;L, and Promotions</a>		✔		
<a href="#">Share Data From Your Account Plan and Customer Business Plan with Stakeholders</a>		✔		



Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Adjust KPIs in Your Customer Business Plan More Intuitively		✓		
Simplify User Access Checks to TPO Prediction Models			✓	
Improved Trade Promotion Management Documentation				
Consumer Goods Cloud Videos	✓			
<b>Automate the Transfer of TPM Promotions to Retail Promotions</b>	✓			
<b>Get Sales Baseline Prediction Data with MuleSoft Direct</b>			✓	
<b>Integrate Additional Business Components from ERP Systems with MuleSoft Accelerator</b>			✓	
<b>Energy and Utilities Cloud</b>				
<b>Financial Services Cloud</b>				
<b>Financial Plans and Goals</b>				
View Financial Plan and Goals		✓		
Update the Financial Account on a Goal		✓		
View and Distribute Funds to Financial Goals		✓		
Identify the Financial Account Funding a Goal		✓		
<b>Data Cloud for Financial Services Cloud</b>				
Calculate Customer Insights using Data Cloud		✓		
View Visualized Insights for Client Cash Flow Summary		✓		
View Visualized Insights for Client Cash Flow by Category		✓		
<b>Residential Loan Application</b>				
Control Who Can Access Residential Loan Application Records		✓		
Residential Loan Application Sharing Setting Updated		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Create a Sharing Set for Mortgage Objects		✓		
<b>Einstein Activity Capture for Financial Services Cloud</b>				
Gain More Visibility for Your Events Organized by Users External to Salesforce	✓			
Streamline Creation of Interaction Participants	✓			
<b>Transaction Dispute Management</b>				
Show More Data About Transactions in the Dispute Intake OmniScript	✓			
Resolve Transaction Disputes with Integrated Business Rules	✓			
Provide Timely Action For Disputed Transactions with Merchant Alerts	✓			
Streamline Dispute-Related Communications with Prebuilt Email Prompt Templates		✓		
Help Your Customers Raise Transaction Disputes Easily	✓			
<b>Service Process Automation</b>				
Streamline Wealth Management Services with Prebuilt Service Processes		✓		
<b>Integrated Onboarding</b>				
Streamline Integration Callouts with Integration Orchestration (Pilot)			✓	
<b>New and Changed Financial Services Cloud Object Fields</b>				
<b>New Apex Classes</b>		✓		
<b>New Connect APIs</b>		✓		
<b>New Invocable Actions</b>		✓		
<b>Mulesoft Wealth Management REST APIs</b>		✓		
<b>Health Cloud</b>				
<b>Advanced Therapy Management Enhancements</b>				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Record Chain of Custody Events with Electronic Signatures			✓	
Override Lead Times Based on Site-to-Site Relationships			✓	
Maintain a Hierarchy of Site Overrides by Location			✓	
Override Work Type Step Lead Times by Country and by Site			✓	
Schedule Transportation Logistics in a Work Procedure			✓	
Show or Hide Appointments in a Work Procedure by User Profile			✓	
<b>Assessment Enhancements</b>				
Evaluate Assessment Scores			✓	
Track Patient Progress Using Assessment History			✓	
Track Changes in Assessment Question Scores			✓	
View and Manage All Patient Assessments in One Place			✓	
Improve Patient Experiences with Prefilled Assessments			✓	
Open Completed Assessments in View Mode	✓			
Give Patients a Complete View of Their Assessments			✓	
Save Assessments as Drafts to Complete Later			✓	
<b>Electronic Signatures</b>				
Confirm Key Record Updates or Workflow Steps with Electronic Signatures			✓	
Show Pending Signatures			✓	
<b>Home Health Enhancements</b>				
Reduce No-Shows By Broadcasting Available Home Visits			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Promote Optimal Patient Health Outcomes With Dependent Home Visits			✓	
Bundle Home Visits to Simplify Scheduling			✓	
Streamline Patient Care With Effective Medication Administration			✓	
Easily Reschedule a Series of Recurring Home Visits			✓	
Cancel Home Visits in Bulk			✓	
Optimize Operations with the Updated Guided Setup for Home Health			✓	
<b>Integrated Care Management Enhancements</b>				
Create Care Plans Using Care Plan Templates	✓			
Update Care Plans Using Additional Assessments	✓			
Associate An Existing Case and Clinical Service Request to a New Care Plan	✓			
Manage Care Plans on Case and Clinical Service Request Record Pages			✓	
<b>Interoperability for Health</b>				
New Salesforce Healthcare APIs			✓	
MuleSoft Direct Integrations with Health Cloud			✓	
<b>Medication Review and Medication Management Enhancements and Updates</b>				
Easily Set Up a Custom Flow for Medication Therapy Review			✓	
RxNorm Interaction API is Deprecated			✓	
<b>Provider Network Management Enhancements</b>				
Manage Provider Contracts with Provider Network Management			✓	
<b>Provider Search Enhancements</b>				
Enrich the Provider Search Experience			✓	
Add More Custom Fields to Run Provider Searches			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<b>Referral Management Enhancements</b>				
Accept Referrals from Guest Users			✓	
Coordinate Care for Referred Patients			✓	
Focus on Key Referral Metrics to Improve Efficiency			✓	
<b>CRM Analytics Enhancements</b>				
Manage Your Patient Referrals Better Using Referral Analytics			✓	
<b>Health Cloud Has New and Changed Objects</b>				
Create Custom Report Types for More Objects			✓	
New and Changed Invocable Actions in Health Cloud		✓		
New Connect REST API Resources in Health Cloud		✓		
Update Sharing Settings for the Operating Hours Object			✓	
<b>Insurance</b>				
<b>Loyalty Management</b>				
<b>Global Promotions Management</b>				
Offer Members Real-Time Discounts on Their Purchases			✓	
Pick from a Diverse Set of Options to Define a Promotion's Eligibility Criteria			✓	
Get a Jump-Start on Adding Promotion Rules with Promotion Templates			✓	
Offer Wide-Ranging Rewards to Members			✓	
Put a Cap on the Brand's Promotion Spend			✓	
Notify Members About Promotions Through Personalized Emails			✓	
Manage All Aspects of Your Promotions from a Single App			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Analyze Promotion Impact with Global Promotions Management Analytics			✓	
<b>Make Your Loyalty Program Engaging and Fun with Games</b>			✓	
<b>Do More with the Refreshed Quick Promotion Guided Flow</b>	✓			
<b>Increase Your Efficiency with a Simplified Loyalty Program Page</b>	✓			
<b>Optimize Your Liability Forecast with Multivariate Forecasting</b>			✓	
<b>Reward Members for Scanning Receipts</b>	✓			
<b>Improve Dining Experience With Loyalty Management Restaurant POS</b>	✓			
<b>New and Changed Objects in Loyalty Management</b>		✓		
<b>New Metadata Types in Loyalty Management</b>		✓		
<b>New and Changed Connect REST APIs</b>				
New Connect REST API Resources in Loyalty Management		✓		
Changed Connect REST API Response Bodies		✓		
<b>Gamification Mobile SDK</b>				
<b>Manufacturing Cloud</b>				
<b>Manage Sales Agreement Data Easily and Swiftly</b>			✓	
<b>Build a Product Portfolio That Best Reflects Your Company's Offerings</b>			✓	
<b>Inventory Visibility Foundations for Manufacturing Cloud</b>				
Get Visibility Into the Entire Lifecycle of Your Inventory			✓	
Design Your Own Search Experience to Manage Your Inventory			✓	
<b>Quickly Import Production Forecasts from CSV Files</b>			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<a href="#">Fleet Management Enhancements</a>			✓	
<a href="#">Watch Manufacturing Cloud Videos</a>			✓	
<a href="#">Media Cloud</a>				
<b>Net Zero Cloud</b>				
<a href="#">Author Disclosure Reports in Microsoft 365 Word</a>			✓	
<a href="#">Categorize Emissions for Ground Travel Energy Use into Individual Greenhouse Gases</a>			✓	
<a href="#">Keep Better Track of Market-Based and Location-Based Electricity Emission Factors for Stationary Assets</a>			✓	
<a href="#">Make Setup Pages Accessible to Net Zero Cloud Admins</a>			✓	
<a href="#">Other Improvements to Inventory Automation</a>			✓	
<a href="#">Other Improvements to Emissions Factors Management</a>			✓	
<a href="#">New and Changed Objects for Net Zero Cloud</a>	✓			
<a href="#">New Net Zero Cloud Metadata Type</a>		✓		
<a href="#">New Invocable Action in Net Zero Cloud</a>		✓		
<b>CRM Analytics for Net Zero Cloud</b>				
Track Program Effectiveness by Using Analytics Dashboards				
Access the Enhanced Climate Action and Audit Dashboards Quickly				
<b>Public Sector Solutions</b>				
<a href="#">Accelerate Complaint Intake for Judicial and Investigative Cases</a>			✓	
<a href="#">Efficiently Manage Service Requests</a>			✓	
<a href="#">Easily Add Participants to a Case Proceeding</a>			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Ensure Accurate Eligibility Determinations When Circumstances Change			✓	
Get Insights into Caseworker Productivity and Community Impact			✓	
Easily Refer Constituents to Providers by Using a Guided Flow			✓	
Use Filters to Aggregate a Subset of Records			✓	
Administer Social Insurance Benefits to Constituents			✓	
Create Business Authorization Applications with Out-of-the-Box Components			✓	
Set Up the Add Complaint Participants and Add Allegations Flows with Out-of-the-Box Components			✓	
Easily Configure More Case Management Features by Using the Updated Guided Setup Assistant			✓	
Control Provider Access to Benefit Assignment Records on Experience Cloud Sites			✓	
Assign Public Sector Solutions Permissions to the Salesforce Integration User			✓	
New and Changed Objects in Public Sector Solutions		✓		
New and Changed Metadata Types in Public Sector Solutions		✓		
New and Changed Tooling API Objects in Public Sector Solutions		✓		
Apex: New and Changed Items				
<b>Rebate Management</b>				
Design Special Pricing Terms with More Precision			✓	



Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<a href="#">Project Accurate Accruals with Precise Accrual Rates</a>			✓	
<a href="#">Efficiently Import Incentive Claims and Transaction Data from CSV Files</a>			✓	
<a href="#">Changed Fields in Rebate Management and Ship and Debit Process Management</a>			✓	
<b>Referral Marketing</b>				
<a href="#">Bring Referral Promotions of the Company's Various Brands Under One Roof</a>				
<a href="#">Bake Referral Processes into the Brand's Existing Business Processes</a>				
<a href="#">Grow a Referral Program Base by Identifying Members Who Are Likely to Refer</a>			✓	
<a href="#">Watch Referral Marketing Videos</a>				
<a href="#">Changed Objects in Referral Marketing</a>				
<a href="#">New Invocable Actions in Referral Marketing</a>		✓		
<a href="#">New Referral Marketing Metadata Types</a>		✓		
<a href="#">Salesforce Contracts</a>				
<b>Salesforce for Education</b>				
<a href="#">Use Education Cloud to Support Mentoring</a>			✓	
<a href="#">Support Learners with Mentoring Programs</a>			✓	
<a href="#">Create Mentoring Program Enrollment Portals</a>			✓	
<a href="#">Create Mentoring Records Using Education Public API</a>		✓		
<a href="#">Customize the Application Experience For Your Users</a>		✓		
<a href="#">Create an Applicant Portal for Parents, Guardians, and Agents</a>		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Leverage AI to Discover Skills for Courses and Programs (Pilot)			✓	
Use the Education Portal Template to Create Customized Sites for a Variety of Learners		✓		
Create Action Plans by Using Action Plan Templates in Action Center			✓	
Manage Action Plans on the Case Record Page		✓		
Modify Your Learning Offerings in the Learning Wizard		✓		
View Learning Program Plan Details in Program Plan Summary		✓		
Enhance Institutional Efficiency by Using Analytics Insights			✓	
Use Fundraising Updates for Advancement			✓	
Create and Manage Mandated Reports Using Disclosure and Compliance Hub			✓	
Support Programs and Benefits Using Outcome Management			✓	
Update OmniStudio Designer Settings			✓	
Migrate Managed Packages to Education Cloud		✓		
New and Changed Objects in Education Cloud		✓		
New Connect REST API Resource in Education Cloud				
<b>Salesforce for Nonprofits</b>				
<b>Nonprofit Cloud</b>				
Quickly Build an Integration with Fundraising		✓		
Split Gift Transaction Amount Attribution Across Multiple Campaigns		✓		
Create Outreach Source Code URLs			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Track Payment Data		✓		
Import Data with CSV Data Management for Industries	✓			
Do More With Program and Case Management in Experience Cloud			✓	
New and Changed Objects in Nonprofit Cloud		✓		
New and Updated Connect APIs		✓		
<b>IdeaExchange Delivered: Find and Fix Potential Duplicates in Nonprofit Success Pack (Managed Package)</b>		✓		
<b>Security Enhancements for Volunteers for Salesforce (Managed Package)</b>	✓			
<b>Connect REST APIs</b>				
New Connect REST API Resources		✓		
<b>Elevate Retirement</b>	✓			
<b>foundationConnect Retirement</b>	✓			
<b>Vlocity Contract Lifecycle Management</b>				
<b>Industries Common Features</b>				
<b>AI Accelerator</b>				
Enhance AI Capabilities for Sagemaker Integration		✓		
<b>Action Launcher</b>				
Streamline Customer Service by Quickly Launching Button- and Link-based Actions	✓			
Personalize Action Launcher	✓			
Accelerate Action Launcher Configuration with Out-of-the-Box Deployments	✓			
<b>Actionable Segmentation</b>				
Create Actionable List Definitions Faster with Predefined Data Processing Engine Definitions		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Build More Flexible and Extensive Filters with Multi-Select Picklists		✓		
Reuse Filter Criteria with Filter Templates	✓			
Get a Quick View of an Actionable List Member's Details	✓			
New and Changed Objects		✓		
<b>Batch Management</b>				
Batch Management Big Objects Support		✓		
<b>Bulk Action Panel</b>				
Streamline the List Creator Workflow with Contextual Bulk Actions	✓			
Changed Object in Bulk Action Panel		✓		
<b>Business Rules Engine</b>				
Use a Template to Invoke Expression Sets from a Flow	✓			
Create Precise Rules with Null Operators and Functions	✓			
Add Business Elements to a List Group	✓			
Decision Tables				
Decision Explainer for Expression Sets				
Work with Expression Sets Efficiently with the Enhanced Expression Set Builder	✓			
Permission Set Changes to Enable List Variable Usage in Expression Sets	✓			
Changed Business Rules Engine Object		✓		
Changed Business Rules Engine Tooling API Objects		✓		
Connect REST APIs		✓		
<b>Context Service</b>				
Extend and Seamlessly Enhance Standard Definitions		✓		
Easily Sync an Extended Custom Definition		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Other Context Service Enhancements		✓		
<b>Criteria-Based Search and Filter</b>				
Display Search Results as Cards			✓	
Use More Search Result Filters			✓	
Filter Search Results by Fields with Multiple Values			✓	
Changed Objects in Criteria-Based Search and Filter			✓	
<b>CSV Data Management for Industries</b>				
Prepare and Upload CSV File			✓	
Select Salesforce Object and Map Columns				
Preview and Validate CSV File Data			✓	
View Import Logs			✓	
<b>Data Processing Engine</b>				
Choose Data Cloud Objects for Data Sources		✓		
Write Back Results to Data Lake Objects		✓		
Use Data Spaces in Data Processing Engine Definitions		✓		
Troubleshoot Quickly with Restore Previous Saved Field Selection		✓		
Upload CSV File Data to Salesforce with Data Processing Engine		✓		
Data Processing Engine Videos		✓		
Metadata API		✓		
<b>Discovery Framework</b>				
Choose Which Assessment Questions to Prefill			✓	
Save Assessments as Drafts to Complete Later in Health Cloud			✓	
Changed Objects in Discovery Framework			✓	
<b>Engagement</b>				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Automate Business Processes with the Get Record Details Action	✓			
<b>Grantmaking</b>				
Add Collaborators to a Grantmaking Portal			✓	
See the Difference Between the Planned Budget and What Was Spent	✓			
Create Private Funding Opportunities in Experience Cloud			✓	
New and Changed Objects for Grantmaking		✓		
<b>Intelligent Document Reader</b>				
Streamline Data Extraction by Using Intelligent Document Reader		✓		
Changed Invocable Actions		✓		
<b>Intelligent Form Reader</b>				
Streamline Data Extraction by Using Intelligent Form Reader				
Changed Invocable Actions		✓		
<b>KPI Bar</b>				
Provide Customized Insights on Actionable Lists	✓			
Optimize Business Performance by Using Custom Key Performance Indicators	✓			
Experience Streamlined Navigation in KPI Bar	✓			
New Objects in KPI Bar		✓		
<b>List Builder for Data Cloud Segment</b>				
Access Data Segments Securely and Easily	✓			
View Key Information Quickly	✓			
Stay Informed on Actionable List Limit with Email Notification	✓			
<b>Outcome Management</b>				
Automatically Calculate and Create Indicator Results			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Connect Case Management Care Plans to Outcome Management			✓	
Use Outcome Management with Experience Cloud			✓	
New and Changed Objects for Outcome Management			✓	
<b>Reminders</b>				
Drive Engagement with Scheduled Reminders	✓			
New Objects in Scheduled Reminders		✓		
New Connect REST API Resource in Scheduled Reminders				
<b>Timeline</b>				
Securely Show Engagement Events on Timeline	✓			
New Object in Timeline		✓		

## Marketing Cloud

Marketing Cloud Growth edition uses the power of the Salesforce platform and reimagined core objects to offer a curated experience just for marketers. This experience is generally available in Spring '24. Kick-start campaigns with predefined options, build meaningful audiences from unified data, and create automated messaging using new flow elements. Plus, get a little help from Einstein generative AI along the way. Admins can use the setup assistant in Salesforce Setup and the implementation guide to help prepare and customize your Marketing Cloud Growth.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Kick-Start Campaign Creation with Preset Options	✓			
Build Audiences and Track Success with Unified Data	✓			
Market Responsibly with Consent Management Tools	✓			
Generate Campaigns and Segments with Einstein AI			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<a href="#">Create Content in a Consistent Editing Experience</a>			✓	
<a href="#">Other Features in Marketing Cloud Growth</a>			✓	

## Marketing Cloud Account Engagement

Streamline processes and improve personalization with generative AI, enhanced Data Cloud integration, and a new email editing experience. Update your sending domains to prepare for upcoming changes to the Gmail and Yahoo email platforms in 2024.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<a href="#">Generate Content with Einstein in Account Engagement</a>			✓	
<a href="#">Import Account Engagement Email Data into Data Cloud</a>	✓			
<a href="#">Use the Latest Email Editing Experience for Account Engagement</a>	✓			
<a href="#">Update Your Account Engagement Sending Domains to Prepare for 2024 Email Platform Changes</a>	✓			
<a href="#">The Twitter Connector Has Been Retired</a>	✓			
<a href="#">Account Engagement API: New and Changed Items</a>		✓		

## Mobile

Accomplish tasks faster with Einstein Copilot. Mobile Offline for Salesforce Mobile App Plus gets updates to the Offline App Developer Starter Kit, Offline App Onboarding Wizard, and the new Mobile Builder (beta). Add a biometric ID check to your Mobile Publisher for Experience Cloud app. Easily expand or collapse all rules when you view the details of a briefcase in Briefcase Builder.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<a href="#">Salesforce Mobile App</a>				
<a href="#">Everything That's New in the Salesforce Mobile App</a>				



Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Streamline Everyday Activities with Einstein Copilot on the Salesforce Mobile App	✓			
Generate Content on Record Pages with the Salesforce Mobile App	✓			
Salesforce Mobile App Requirements Have Changed	✓			
Save Dashboard Views on Your Mobile Devices	✓			
Uncover Answers to Business Questions with Data Cloud Reports	✓			
Easily Configure Offline Landing Pages with Mobile Builder (beta)			✓	
Offline App Onboarding Wizard v2 Enhancements				
Offline App Developer Starter Kit Enhancements				
Defined Global Actions Now Primed for Offline Use				
Better Error Handling When Quick Actions Haven't Been Deployed				
Preview Mobile Actions on Record Pages Before Activating		✓		
IdeaExchange Delivered: Use Dynamic Actions on Standard Objects on Mobile			✓	
<b>Mobile Publisher</b>				
<b>Avoid Disrupting Your Mobile Publisher Android App's Push Notifications</b>		✓		
<b>Add Biometric ID Checks for Mobile Publisher for Experience Cloud App Features</b>		✓		
<b>Set the Default Method for How Your Mobile Publisher for Experience Cloud App Opens URLs (Beta)</b>		✓		
<b>Briefcase Builder</b>				
<b>View All Rules and Filters on a Briefcase</b>			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<b>General</b>				
<a href="#">Update Your Android Mobile Connected App's Information for Push Notifications</a>				

## OmniStudio

In the Spring '24 release, OmniStudio Standard (when the Managed Package Runtime setting is disabled) supports features from OmniStudio for Vlocity, including specifying XML publish options for FlexCards, tracking use of OmniStudio components, updating addresses with Google Maps, sending documents on behalf of others, and migrating all versions of OmniStudio components.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<a href="#">Automatic Upgrades for Managed Packages</a>		✓		
<a href="#">Display FlexCards with More Options</a>	✓			
<a href="#">Improve Workflows with Usage Data</a>		✓		
<a href="#">Migrate All Versions of OmniStudio Components</a>		✓		
<a href="#">Save Time Activating Components After You Change Runtimes</a>		✓		
<a href="#">Send Documents on Behalf of Others</a>	✓			
<a href="#">Use OmniOut on Mobile Devices</a>		✓		
<a href="#">OmniStudio Minor Releases</a>				✓

## Revenue

Automate and scale your revenue operations with a robust portfolio of Revenue Cloud products. Introducing Revenue Lifecycle Management—meticulously crafted through customer collaboration to enable product-to-cash automation on one trusted platform. Salesforce CPQ offers improved security with an integration user. Salesforce Billing provides enhanced error logs and a batch invoice run cleanup process so that it's easier and faster to generate correct invoices. And Subscription Management includes security and usability improvements so that you can manage recurring revenue operations with ease.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<b>Revenue Lifecycle Management</b>				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<b>Product Catalog Management (Generally Available)</b>				
Increase Product Findability Through a Visual Product Catalog			✓	
Reuse Attributes to Define Similar Products At Scale			✓	
Accelerate Product Creation Through Product Classifications			✓	
Effortlessly Design Products Of Varying Levels Of Complexity			✓	
Model Products to Represent Industry-Specific Product Types			✓	
Define Business Rules For Product and Product Category Eligibility and Availability			✓	
Define Business Rules For Product Validation and Compatibility		✓		
Customize the Product Catalog Management Home Page with Lightning Web Components			✓	
Use APIs to Programmatically Access Your Product Data			✓	
Scratch Org Features				
New and Changed Objects in Product Catalog Management			✓	
New Tooling API Objects in Product Catalog Management			✓	
New Metadata Types in Product Catalog Management			✓	
New Connect REST API Resources			✓	
<b>Salesforce Pricing (Generally Available)</b>				
Manage Pricing Policies and Processes Easily by Using Salesforce Pricing			✓	
Perform Complex Price Calculations Using a Recipe			✓	
Track Your Products by Using Price Books and Price Book Entries			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Control Pricing with Adjustment Schedules			✓	
View Your Pricing Data Your Way			✓	
View Product Discounts on a Single Calendar			✓	
Build Context Definitions to Use Data Efficiently			✓	
Calculate Discounts Using Defined Pricing Elements			✓	
Set a Product's Price on the Object Record Page			✓	
Make Better Pricing Decisions Using Price Waterfall			✓	
Salesforce Pricing Flows			✓	
Manage Financial Decisions With Partner Communities			✓	
Configure Salesforce Pricing with Ease Using Guided Setup			✓	
New Objects in Salesforce Pricing			✓	
New Connect REST API Resources			✓	
New Invocable Actions			✓	
New Metadata Types			✓	
<b>Product Configurator (Generally Available)</b>				
Configure Your Products More Easily	✓			
New Connect REST API Resource			✓	
<b>Quote and Order Capture (Generally Available)</b>				
Product Discovery			✓	
Capture Quotes and Orders			✓	
Configure Products To Accurately Price Quotes and Orders			✓	
Increase Revenues With Partner Communities			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
New and Changed Objects in Salesforce Quote and Order Capture			✓	
New Connect REST API Resources in Quote and Order Capture			✓	
New Metadata Types in Quote and Order Capture			✓	
New Invocable Actions in Quote and Order Capture			✓	
CommerceOrders Namespace			✓	
PlaceQuote Namespace			✓	
<b>Asset Lifecycle (Generally Available)</b>				
See the Customer Assets That Need Your Attention	✓			
Visualize Customer Assets in Partner Communities			✓	
Amend, Renew, or Cancel Assets			✓	
Create a Contract from a Quote or Order		✓		
Automatically Create an Asset Contract Relation Using Asset Creation Flows	✓			
New Invocable Actions in Asset Lifecycle			✓	
New Metadata Types in Asset Lifecycle			✓	
<b>Salesforce CPQ</b>				
<b>Generate Permissions for the Integration User</b>			✓	
<b>Subscription Management</b>				
<b>Enhanced Error Handling for Billing Schedules</b>	✓			
<b>Ensure Valid States When Using Single Invoice Generation API</b>	✓			
<b>Ensure Users Can Access OrderToAsset and OrderItemToAsset Platform Events</b>			✓	

## Sales

Boost your sales teams' results with new Einstein features, detailed metrics, and simplified setup experiences. Einstein for Sales users can harness the power of generative AI to draft sales emails, answer questions about sales calls, and find similar past won deals. Your sales teams can use Seller Home to see an overview of metrics, goals, suggestions, and activities. Sales reps can use Salesforce Maps Lite to plan in-person and virtual visits in key geographic areas. Revenue Insights has a simplified setup experience, and sales reps can use Stage Conversion analysis to dive into their pipeline details. Pipeline Inspection has a more responsive UI. And in Partner Relationship Management, your channel managers can use the Channel Management Console as a command center for your teams' indirect sales.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<b>Sales Cloud Einstein</b>				
<b>Draft Personalized Sales Emails with Einstein</b>			✓	
<b>Get More Options with Custom Sales Email Templates</b>	✓			
<b>Draft Sales Emails in More Languages</b>	✓			
<b>Let Users Enter Generative AI Instructions to Create Sales Emails</b>	✓			
<b>Control Whether Users Can Enter Their Own Sales Email Prompt Instructions</b>	✓			
<b>Accelerate Productivity With Sales Summaries in Einstein Copilot (Generally Available)</b>			✓	
<b>Identify Risky Deals in Your Seller's Forecast</b>			✓	
<b>Take the Next Best Step to Close More Deals</b>			✓	
<b>Reengage Customers with a Post-Call Email</b>			✓	
<b>Learn Best Practices from Similar Won Deals</b>			✓	
<b>Einstein Activity Capture</b>				
Connect Google to Salesforce with a Google Workspace Marketplace App		✓		
Resolve User Connection and Synchronization Issues Quickly to Improve Performance		✓		
Get In-App and Email Notifications When Users' Connections Are in Trouble		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Address Your Users' Connection Issues Quickly by Seeing Org ID and Username in Notifications		✓		
Get Fewer User Connection Notifications		✓		
Trigger Flows from Activity Insights			✓	
See More Activities Dashboards in One Place			✓	
More Salesforce Orgs Are Eligible for Activity 360 Reporting			✓	
Service Account OAuth 2.0 Authentication to Microsoft Office 365 Is Being Retired		✓		
<b>Einstein Conversation Insights</b>				
<b>Ask Call Questions with Call Explorer Powered by Einstein</b>			✓	
<b>See Call Summaries in Languages Other than English</b>	✓			
<b>Use Einstein Conversation Insights with Microsoft Teams and Google Meet</b>			✓	
<b>See the License Usage and User Status for Einstein Conversation Insights</b>		✓		
<b>Use Einstein Conversation Insights in More Languages</b>	✓			
<b>Add Call Participants to Video Call Records with Ease</b>	✓			
<b>Access Full Support for More Voice Providers</b>			✓	
<b>Get 10 Einstein Conversation Insights Licenses with Enterprise Edition</b>			✓	
<b>Access Dashboard Improvements</b>	✓			
<b>Identify Speakers on Mono Calls</b>	✓			
<b>Get More Details About Errors</b>	✓			
<b>Sales Fundamentals</b>				
<b>Drive Success with Seller Home</b>	✓			
<b>Visualize Customers and Prospects on a Map</b>			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<b>Leads</b>				
See Which Leads are Engaging and View Insights	✓			
<b>Accounts</b>				
Get a Full View of Account Health with the Account Intelligence View	✓			
<b>Contacts</b>				
See Which Contacts are Engaging and View Insights	✓			
Spend Less Time Finding New Contacts with Einstein Suggestions	✓			
<b>Sales Engagement</b>				
Create Responsive Cadences Faster with Cadence Builder 2.0	✓			
Save Time by Creating Call Scripts and Email Templates with Quick Cadences	✓			
<b>Revenue Intelligence</b>				
Perform a Deep Analysis of Win Rates and Pipeline Bottlenecks	✓			
Manage Your App Installation and Refreshes in One Place	✓			
Make Installing Revenue Insights a Breeze	✓			
<b>Pipeline Inspection</b>				
IdeaExchange Delivered: Get More in Pipeline Inspection with Increased Record Limits in Charts and Views	✓			
Narrow In on Deals with Filter Logic in Pipeline Inspection	✓			
IdeaExchange Delivered: Get a More Flexible Pipeline Inspection UI	✓			
<b>Collaborative Forecasts</b>				
View and Set Forecasts with Forecast Groups			✓	



Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<b>Gain Forecast Clarity with Side-by-Side Adjustment Details</b>			✓	
<b>Access Different Forecast Views in Tabs</b>	✓			
<b>Gain Deeper Insights About Forecast Health with Forecast Chart Enhancements</b>	✓			
<b>Unlock More Details and Spot Trends with More Forecasting Custom Report Types</b>		✓		
<b>Round Forecast Amounts for More Streamlined Forecasts</b>	✓			
<b>Enablement and Guidance</b>				
<b>Enablement</b>				
Build a Community of Loyal Partners with Partner Enablement Programs and In-App Guidance			✓	
Expand Your Enablement Strategy to More Users with Program Self-Enrollment			✓	
Assign Offline Tasks to Your Sales Reps in Enablement Programs		✓		
Refresh Program Progress at Your Convenience	✓			
Try Sales Programs for Free with Enablement Lite			✓	
Other Changes in Enablement		✓		
<b>Guidance Center and In-App Guidance</b>				
Create and Test In-App Guidance in Lightning Experience with the New Setup Domain			✓	
Find a New Name for Prompt and Walkthrough Management Permissions			✓	
<b>Partner Relationship Management</b>				
<b>Monitor Your Channel Business Like a Pro from the Channel Management Console</b>			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<b>Enable and Guide Your Partners</b>			✓	
<b>Sharpen Selling Decisions with a Consolidated View of Insights on Contacts or Leads</b>			✓	
<b>Prioritize Selling with More Pipeline Insights and Actions</b>			✓	
<b>Track Partner Activity with New Analytics Resources</b>	✓			
<b>Other Changes for Partner Relationship Management</b>		✓		
<b>Sales Performance Management</b>				
<b>Sales Planning</b>				
Engage Stakeholders in Sales Planning Processes			✓	
Optimize Boundary Assignments	✓			
Other Improvements in Sales Planning			✓	
<b>Email, Calendar, and Integrations</b>				
<b>Outlook and Gmail Integration</b>				
Log Emails and Events More Accurately and Quickly	✓			
Get More Options in Your Email Integration with Custom Sales Email Templates	✓			
Enter Generative AI Instructions to Create Sales Emails in Email Integrations	✓			
<b>Email Experience</b>				
Time Slots for Suggested Meeting Times Have a New Look	✓			
<b>Salesforce Inbox</b>				
Inbox Mobile App	✓			
Inbox Mobile Was Retired	✓			
<b>Salesforce for Outlook</b>				
Salesforce for Outlook Is Now Being Retired in December 2027		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<b>Sales Cloud Everywhere</b>				
Set Up Salesforce Everywhere More Easily			✓	
Stay Logged In to Sales Cloud Everywhere	✓			
Keep Productivity at Hand with the Embedded Side Panel for Everywhere			✓	
Work Efficiently with Sales Cloud Everywhere			✓	
Sell More Efficiently in Sales Cloud Everywhere	✓			
Follow Up on Companies of Interest with Contextual Insights			✓	
Follow Up on People of Interest with Contextual Insights			✓	
Update Data for Many Records in Workspace	✓			
Focus on the Right Records and Personalize Your Workspace	✓			
Get the Power of Copilot in Sales Cloud Everywhere			✓	
See the Fields You Want in Sales Cloud Everywhere			✓	
<b>Salesforce Meetings</b>				
Set Up Meeting Options More Easily in Sales Engagement Setup	✓			
Meeting Studio Is Being Retired	✓			
<b>Other Changes in the Sales Cloud</b>				
Marketing App Was Renamed	✓			
Social Accounts, Contacts, and Leads Was Retired			✓	
Enable New Order Save Behavior (Release Update)			✓	

## Salesforce CMS

Create content publication schedules and preview content in Salesforce CMS.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<a href="#">Schedule Content to Publish and Unpublish in Enhanced CMS Workspaces</a>		✓		
<a href="#">Preview Content in Enhanced CMS Workspaces</a>		✓		
<a href="#">Work Smarter with Upgrades to CMS Workflows</a>		✓		

## Salesforce Flow

Compose intelligent workflows with Flow Builder 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
<a href="#">Flow Integration</a>			✓	
<b>Flow Builder</b>				
<b>Flow Builder Updates</b>				
<a href="#">Provide Data to Einstein with Template-Triggered Prompt Flows</a>			✓	
<a href="#">Send Data to Data Cloud using Flows</a>		✓		
<a href="#">Verify Your API Connection via HTTP Callout</a>		✓		
<a href="#">Create Multiple Instances of a Set of Fields with the New Repeater Component (Beta)</a>		✓		
<a href="#">Sum or Count Items in Collections More Easily with the Transform Element (Beta)</a>		✓		
<a href="#">Use More Components to React to Changes on the Same Screen (Generally Available)</a>		✓		
<a href="#">Use Text Templates to React to Changes on the Same Screen</a>		✓		
<a href="#">Validate User Input for More Screen Components</a>		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Wait for Engagement Events in Segment-Triggered Flows with the Wait Until Event Element		✓		
Run Event-Triggered Flows as Workflow User		✓		
Save the Progress of Your Flow as You Build Expanded to More Elements		✓		
Find and Select Flow Resources More Easily in More Elements		✓		
Use Predictions from Your AI Models in Flows		✓		
<b>Flow Debugging</b>				
Debug Data Cloud-Triggered Flows		✓		
<b>Flow Runtime</b>				
Maintain Your Previous Selections When You Search a Data Table	✓			
<b>Flow Management</b>				
View Performance Details for Segment-Triggered Flows		✓		
Migrate Even More Processes with the Updated Migrate to Flow Tool		✓		
Delete Workflow Rules from Managed Packages		✓		
Identify Flows Containing Email Alerts		✓		
Have Unlimited Paused and Waiting Flows		✓		
<b>Flow Extensions</b>				
Salesforce Relaunches Four Previously Enforced Release Updates		✓		
Manage Your MuleSoft Anypoint Platform Connection (Beta) in MuleSoft Services			✓	
Use Custom Input Validations with Screen Extension Components		✓		
Use Media Type Mapping Options for Importing APIs with MuleSoft Services			✓	
<b>Flow and Process Release Updates</b>				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Enable EmailSimple Invocable Action to Respect Organization-Wide Profile Settings (Release Update)			✓	
Enforce Sharing Rules when Apex Launches a Flow (Release Update)			✓	
Prevent Guest User from Editing or Deleting Approval Requests (Release Update)			✓	
Restrict User Access to Run Flows (Release Update)			✓	
Enable Secure Redirection for Flows (Release Update)		✓		
Enforce Rollbacks for Apex Action Exceptions in REST API (Release Update)			✓	
Run Flows in User Context via REST API (Release Update)			✓	
Evaluate Criteria Based on Original Record Values in Process Builder (Release Update)			✓	
Make Flows Respect Access Modifiers for Legacy Apex Actions (Release Update)			✓	
Disable Access to Session IDs in Flows (Release Update)		✓		
Enable Partial Save for Invocable Actions (Release Update)		✓		
<b>Flow Orchestration</b>				
<b>Control the User Context of a Background or MuleSoft Step</b>		✓		
<b>Use Reports for Flow Orchestration Objects to Track Orchestration Usage</b>		✓		
<b>Disable Default Email Notifications for Orchestration Work Items</b>		✓		
<b>Fine-Tune Access to Flow Orchestration Functions</b>		✓		
<b>Other Improvements</b>		✓		

## Security, Identity, and Privacy

View anomalous guest user activity right from the Threat Detection app in Security Center. Update your trusted URLs for an upcoming change. Reduce your reliance on redirections for your legacy Salesforce domains. Access External Key Management in all commercial zones. Use the OAuth 2.0 token exchange flow, enable the OAuth 2.0 refresh token rotation, or set up any of a handful of external client app OAuth 2.0 flows.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<b>Domains</b>				
<a href="#">Update References to Your Previous Salesforce Domains</a>		✔		
<a href="#">Use Partitioned Domains in More Orgs</a>	✔			
<b>Identity and Access Management</b>				
<a href="#">Migrate to a Multiple-Configuration SAML Framework (Release Update)</a>			✔	
<a href="#">Improve Compatibility with Third-Party Services with the Token Exchange Flow</a>			✔	
<a href="#">Expand Branding Options and Improve Security for Headless Identity Flows</a>			✔	
<a href="#">Monitor Changes to Login Pages in the Setup Audit Trail</a>		✔		
<a href="#">Find Experience Cloud SAML Endpoints More Easily</a>		✔		
<a href="#">Salesforce-Managed App for the Twitter Authentication Provider is Being Retired</a>		✔		
<a href="#">Generate Parameters for the Proof Key for Code Exchange (PKCE) Extension</a>		✔		
<a href="#">Rotate Refresh Tokens</a>			✔	
<a href="#">Responses from the SCIM Users Endpoints Use 24-Hour Format for Created and Last Modified Dates</a>		✔		
<a href="#">Get OAuth 2.0 Credentials for Consumers Associated with an External Client App</a>			✔	
<a href="#">Configure an OAuth 2.0 Client Credentials Flow for an External Client App</a>			✔	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Configure an OAuth 2.0 Device Flow for External Client Apps			✓	
Configure an OAuth 2.0 JWT Bearer Flow for External Client Apps			✓	
Disable or Enable an External Client App Plugin			✓	
MFA Auto-Enablement Concludes for All Remaining Orgs (Release Update)		✓		
UI Text Improvements for the MFA Registration Experience		✓		
Salesforce Authenticator Is Disabled for External Users in Newly Created Orgs				✓
Revert Seamlessly to One-Time Passcodes for Identity Verification in Salesforce Authenticator	✓			
Update the Salesforce Authenticator App to Version 4.1 in Summer '24	✓			
Use Email Verifications to Back Up and Restore Connected Accounts in Salesforce Authenticator	✓			
Stay on Top of Push Notifications for Salesforce Authenticator				
Terminate a User's UI Sessions Automatically When Resetting Their Password		✓		
Login History Entries Are Reduced When Login Rate Limiting Is Active		✓		
Set Up Registration and Login for Pay Now			✓	
Upgrade to Identity Connect 7.1.6			✓	
Receive Additional Status Information During Headless Forgot Password Flow			✓	
See Password Resets in the Login History		✓		
<b>Named Credentials</b>				



Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Use the Basic Authentication Protocol with Named Credentials			✓	
Distribute Named Credentials with Second-Generation Managed and Unlocked Packages		✓		
Do More with Named Credential Formula Functions		✓		
Experience Improvements to Sandbox Cloning and Org Migrations for Named Credentials		✓		
<b>Privacy Center</b>				
Automatically Run Right to Be Forgotten Jobs		✓		
View Error Details for Failed Policy Jobs		✓		
Copy Privacy Center Policies Between Sandbox and Production Orgs		✓		
Share Data Between Preference Manager and Data Cloud (Beta)		✓		
Add an Unsubscribe All Button to Preference Forms		✓		
UI Text and Functionality Improvements in Privacy Center		✓		
Permission Requirements for the Consent Event Stream Are Enforced	✓			
<b>Salesforce Backup</b>				
Find Records More Efficiently When Restoring Backups			✓	
Back Up New Data On Demand			✓	
Back Up Files and Attachments			✓	
Control Formula Field Data Backups at the Object Level			✓	
<b>Salesforce Shield</b>				
Event Monitoring				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<a href="#">See Detailed Information About Unusual Guest User Activity with the Guest User Anomaly Event</a>			✓	
<a href="#">Access and Download Event Log File Data with the Event Log File Browser (Beta)</a>			✓	
<a href="#">Monitor Custom Component Usage with Custom Component Instrumentation API (Generally Available)</a>			✓	
<a href="#">Query 1 Year's Worth of Event Log File Data</a>			✓	
<b>Shield Platform Encryption</b>				
<a href="#">IdeaExchange Delivered: Use External Key Management in All Commercial Zones</a>			✓	
<a href="#">Configure Your Encryption Policy with Fewer Clicks</a>			✓	
<a href="#">Enjoy Clearer Names for Probabilistic and Deterministic Tenant Secrets</a>			✓	
<a href="#">Encrypt Financial Account Name and Number in Automotive Cloud</a>			✓	
<a href="#">Encrypt Grantmaking Compliant Data Sharing Comments</a>			✓	
<a href="#">Encrypt Nonprofit Cloud Payment Information</a>			✓	
<a href="#">Encrypt Applicant and Application Form Fields</a>			✓	
<a href="#">Encrypt Fields Used to Train Generative AI Models</a>			✓	
<b>Security Center</b>				
<a href="#">Review Guest User Anomaly Threat Detection Data in Security Center</a>		✓		
<a href="#">Benefit from More Relevant Information in Security Center</a>		✓		
<a href="#">Monitor Additional System Permissions</a>		✓		
<b>Other Changes</b>				
<a href="#">Update Your Content Security Policy (CSP) for Upcoming Changes</a>		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<a href="#">Allow Only Trusted Cross-Org Redirections (Release Update)</a>			✓	
<a href="#">Enter New Firebase Information for Android Push Notifications</a>				
<a href="#">XSS Protection Setting Was Removed</a>		✓		

## Service

Check out new features that enable customer service agents to work faster and more productively across customer service channels.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<b>Einstein for Service</b>				
<a href="#">Einstein Bots Release Notes Have Moved</a>		✓		
<a href="#">Enterprise Edition Support and New Name for Service Cloud Einstein Add-On License</a>	✓			
<b>Einstein Classification</b>				
<a href="#">Use Work Summaries for Chat in More Languages</a>	✓			
<a href="#">Use Work Summaries for Messaging Channels in More Languages</a>	✓			
<a href="#">Close Cases More Efficiently with Work Summaries in Einstein Copilot (Beta)</a>	✓			
<b>Einstein Conversation Mining</b>				
<a href="#">Get Service Insights and Build Bot Intents with Einstein Conversation Mining (Generally Available)</a>		✓		
<b>Einstein Knowledge Creation</b>				
<a href="#">Grow Your Knowledge Base with Generative AI (Generally Available)</a>			✓	
<a href="#">Use Einstein Knowledge Creation in More Languages</a>			✓	
<b>Einstein Reply Recommendations</b>				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<a href="#">Use Service Replies for Chat in More Languages</a>	✓			
<a href="#">Use Service Replies for Email in More Languages (Generally Available)</a>	✓			
<a href="#">See the Knowledge Article Einstein Used to Draft Grounded Service Replies</a>	✓			
<b>Service Intelligence</b>				
<b><a href="#">Manage Your App Installation and Refreshes in One Place</a></b>			✓	
<b><a href="#">Monitor Knowledge Engagements Across Channels and Contexts</a></b>			✓	
<b><a href="#">Help Agents Gauge Customer Effort</a></b>			✓	
<b><a href="#">Help Agents Predict Customer Escalations</a></b>			✓	
<b><a href="#">Apply Additional Service Assets in Data Cloud</a></b>			✓	
<b>Channels</b>				
<b>Email</b>				
<a href="#">Disable Ref ID and Transition to New Email Threading Behavior (Release Update)</a>			✓	
<a href="#">Improvements to Email-to-Case</a>			✓	
<a href="#">Transition to the Lightning Editor for Email Composers in Email-to-Case (Generally Available) (Release Update)</a>			✓	
<b>Messaging</b>				
<a href="#">Get Started with Enhanced Messaging for SMS (Generally Available)</a>		✓		
<a href="#">Say Goodbye to Standard WhatsApp Channels</a>			✓	
<a href="#">Accept Larger Files in Apple Messages for Business</a>	✓			
<a href="#">Close Out Enhanced Messaging Sessions Faster Using Einstein Work Summaries</a>			✓	
<a href="#">Populate Pre-Chat Form Fields by Using an API</a>			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Provide Service and Marketing Together with Unified Messaging for WhatsApp			✓	
Keep Your Agents' Identities Hidden			✓	
Extend Customization of the Enhanced Conversation Component			✓	
Message Customers in Right-to-Left Languages			✓	
Improvements to Messaging				
Auto-End Enhanced Messaging Sessions After No Response				
Try Partner Messaging (Beta)		✓		
Provide Double Opt-In Support in Enhanced Messaging				
Speed Through Messaging Sessions with the Omni-Channel Sidebar			✓	
Preview Your Messaging for Web Branding and Configurations		✓		
Optimize Messaging for In-App and Web with a New Trailhead Badge	✓			
Customize Your Messaging Conversation Window Header with Lightning Web Components			✓	
Save a Transcript of Your Messaging for Web Conversation		✓		
<b>Voice</b>				
Wrap Up Call and Enhanced Messaging Sessions Faster with Einstein Work Summaries			✓	
Enable Single Sign-On with Your Own Identity Provider		✓		
Get Streamlined Support for Service Cloud Voice with Amazon Connect		✓		
Choose a Device for Omni-Channel Notification Sounds	✓			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Set Voice Calls as Interruptible Work to Let Agents Handle the Most Important Tasks			✓	
Recover Transcripts After Service Downtime and Errors			✓	
Set Up Agents Quickly with Auto-Created Quick Connects		✓		
Take Advantage of Additional Einstein Conversation Insights Support for Amazon Connect			✓	
Pass the Conversation Intelligence Rule Name as Input to a Flow (Release Update)			✓	
Check More Critical Settings with the Voice Status Utility	✓			
Get the Latest Enhancements for Your Amazon Connect Contact			✓	
Prepare for Google Chrome's Phasing Out of Third-Party Cookies		✓		
<b>Social Media</b>				
Social Customer Service Starter Pack Is Being Retired	✓			
<b>Chat</b>				
Chat is No Longer Available to All Eligible Orgs		✓		
Other Improvements to Chat				
<b>Channel-Object Linking</b>				
Learn More About Individual-Object Linking from a Welcome Banner		✓		
<b>Knowledge</b>				
Turn On Lightning Article Editor and Article Personalization for Knowledge (Release Update)			✓	
Unify Your Organizational Knowledge Across Sources in Salesforce (Beta)			✓	
Report on Knowledge Engagements Across Channels and Contexts		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Boost the Effectiveness of Your Knowledge Articles with Additional Video Resources			✓	
<b>Self-Service</b>				
Structure Your Help Site with Data Categories (Generally Available)		✓		
Change the Look and Feel of Your Data Categories		✓		
Improve the Experience of Your Site Users		✓		
View Data Subcategories with the Subcategories List Component		✓		
View Layered Data Subcategories		✓		
<b>Service Catalog</b>				
Create Your Fulfillment Automations Faster with an Improved Fulfillments Builder			✓	
Enhance Catalog Fulfillments with Autolaunched and Orchestration Flows			✓	
Control Access to Catalog Items with Eligibility Rules			✓	
Enhance Your Service Catalog Management Experience with Item Search		✓		
Learn How to Use Catalog Eligibility Rules		✓		
Navigate Item Hierarchies Efficiently in Your Service Catalog Site			✓	
Navigate Between Service Catalog Site Pages Effortlessly			✓	
Track Your Catalog Request with the Status Field			✓	
Track Catalog Requests with Catalog Request IDs			✓	
<b>Routing</b>				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<a href="#">Get the Most out of Omni-Channel with the Sidebar Layout</a>				✓
<a href="#">Swiftly Tailor Omni Supervisor to Your Supervisors' Needs with Configurable Tabs</a>				✓
<a href="#">Create Custom Tabs for Omni Supervisor</a>				✓
<a href="#">Select Multiple Queues You Want to Monitor on the Omni Supervisor Wallboard</a>				✓
<a href="#">Protect Your Agents' Identities with Agent Aliases</a>				✓
<a href="#">Use Enhanced Omni-Channel in Apps with Standard Navigation</a>				✓
<a href="#">Enhanced Omni-Channel Allows More Queued Work Items</a>				✓
<a href="#">Create Reports for Agent Work with Pre-Configured Report Types</a>				✓
<a href="#">Get Omni-Channel Notification Sounds Through Your Speakers</a>				✓
<b>Einstein for Feedback Management</b>				
<a href="#">Improve Engagement with AI-Optimized Surveys</a>	✓			
<a href="#">Enhance Survey Reach and Accuracy with Generative AI Translations</a>	✓			
<b>Simplify Text Data Analysis By Using Natural Language Processing (NLP) Services</b>				
<a href="#">Get Easy Access to Natural Language Processing Insights</a>				
<a href="#">Invocable Action to Initiate Natural Language Processing Services</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.



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

Lightning Experience is available in multiple editions. We recommend using the Salesforce mobile app on mobile devices. Specific browsers and devices are supported, and there are limitations and considerations for third-party browser extensions and JavaScript libraries.

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

Salesforce Classic doesn't support mobile browsers, so we recommend using the Salesforce mobile app for working on mobile devices.

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

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

## Supported Browsers and Devices for Lightning Experience

Lightning Experience is available in multiple editions. We recommend using the Salesforce mobile app on mobile devices. Specific browsers and devices are supported, and there are limitations and considerations for third-party browser extensions and JavaScript libraries.

Lightning Experience is available in Essentials, Group, Professional, Enterprise, Performance, Unlimited, and Developer editions. When accessing Lightning Experience on a mobile device, we recommend that you use the Salesforce mobile app. You can also access Lightning Experience on iPad Safari. For more information, see [Lightning Experience on iPad Safari Considerations](#).

Consider these browser restrictions when working with Lightning Experience.


- 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.
- 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	Supports latest stable browser version	Supports latest stable browser version	Supports latest stable browser version

	<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>
			Edge Chromium isn't supported.			
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	—	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.

## Third-Party Browser Extensions and JavaScript Libraries

Before you use a third-party browser extension or JavaScript library, we recommend that you check [AppExchange](#) for browser extensions and apps from Salesforce partners or the [Component Reference](#) for base components that match your requirements.

Although some third-party browser extensions can personalize and enhance your Salesforce experience, we don't recommend using browser extensions that manipulate the DOM. Using third-party browser extensions is at your own risk. Salesforce can't prevent these extensions from accessing your Salesforce data, nor can we detect that there's any attempt to access your data. Additionally:

- Browser extensions that insert or remove elements in the DOM can interfere with the stability of Lightning Experience and lead to unexpected behavior.
- Browser extensions that don't follow Salesforce security standards can fail to work properly in Lightning Experience.

- The internal DOM structure of Lightning Experience can change in a future release, and compatibility with a third-party browser extension isn't guaranteed.

To use a third-party JavaScript library with custom Lightning components, upload it first as a static resource. Use the JavaScript library by loading it in the component depending on which model that you're using.


- Lightning Web Components: Load a third-party JavaScript library via [lightning/platformResourceLoader](#)
- Aura Components: Load a third-party JavaScript library via [ltng/require](#)

## Supported Browsers and Devices for Salesforce Classic

Salesforce Classic doesn't support mobile browsers, so we recommend using the Salesforce mobile app for working on mobile devices.

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

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

### General Enhancements

Spring '24 gives you more reasons to love Lightning Experience.

#### Salesforce Scheduler

Reassign multiple appointments for service resources as per your organization's business needs. Add concurrency to the topics that are added to a shift. Use Salesforce Scheduler Troubleshooter to identify and fix various setup issues and the issues that occur during appointment scheduling.

#### Einstein Search

Work faster, complete tasks directly from the search results, and get results that are most relevant to you. Use Search Manager and Search Settings to configure search features and enhance results.

#### Salesforce Data Pipelines

Preview your hierarchical data before running your recipe. Get information on when each data prep job started and was canceled.

#### Trust Site Enhancements

The Trust site has made some major improvements to help customers stay informed about the availability of their products at Salesforce.

## General Enhancements

Spring '24 gives you more reasons to love Lightning Experience.

### Get Core Major Releases with No Downtime

Starting in Summer '24, major release upgrades on Hyperforce require no service downtime. Users who are online during the upgrade are prompted to log in again to comply with security requirements. Until now, core major release upgrades required a 5-minute maintenance window with downtime.

### Allow the New Setup Domain to Ensure Access to Salesforce Setup Pages

If your company controls users' or servers' access to the internet through firewalls or allowlists, your IT department must add \*.salesforce-setup.com to the company's list of allowed domains. Salesforce Setup pages are now hosted on that domain.

### Temporarily Opt Out of Google Chrome Storage Partitioning

Google Chrome storage partitioning is enabled for Salesforce domains in Summer '24. Give your company additional time to transition away from unpartitioned storage with a new setting that disables storage partitioning until September 2024.

### MFA Enforcement for Salesforce Orgs Is Shifting to In-App Notifications Starting in Summer '24

As we previously communicated, the contractual requirement to use multi-factor authentication (MFA) for Salesforce products is in full effect as of February 1, 2022. To help customers satisfy this requirement, Salesforce automatically enabled MFA for direct logins to existing production orgs. And starting April 2024, MFA is turned on by default for new production orgs. Because of high MFA adoption rates for products built on the Salesforce Platform, we're shifting to a new notification model instead of enforcing MFA in Summer '24.

### MFA Is Turned On by Default Starting April 2024

To prevent unauthorized access to Salesforce accounts, multi-factor authentication (MFA) is required when users log in. To help customers with this contractual requirement, Salesforce is making MFA a default part of the direct login process for production orgs. This change applies to production orgs created on or after April 8, 2024. It also applies to any existing production org that wasn't included in one of the MFA auto-enablement phases that occurred between Spring '23 and Spring '24. Sandbox orgs aren't affected. Orgs that are in a trial period aren't affected until they're converted to a subscription.

### Experience Improved Performance on More Record Home Pages

More objects are Lightning Web Components (LWC)-enabled in Spring '24. Create, view, or edit the record home pages with improved performance, stronger accessibility support, and better service availability.

### [Create From Lookup Changes](#)

Observe several changes to the record create modal that displays when you create a record via a lookup field.

### [Upgrade from Starter to Pro Suite in Your Account](#)

If you're a Starter customer who's ready for the power, personalization, and supercharged efficiency of Pro Suite, request an upgrade in the Product Catalog in Your Account. With Pro Suite, get everything you love from Starter plus better customization and automation options so you can grow your business quickly.

### [Find Transactions Faster with the Your Account Home Page](#)

Improved usability on the Your Account home page directs you to the transactions you want to access, such as manage contracts and pay invoices.

## Get Core Major Releases with No Downtime

Starting in Summer '24, major release upgrades on Hyperforce require no service downtime. Users who are online during the upgrade are prompted to log in again to comply with security requirements. Until now, core major release upgrades required a 5-minute maintenance window with downtime.

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

**When:** This change starts in Summer '24. We continue to communicate the date of major releases one year in advance, and releases occur during a 1-hour window that is communicated 60 days in advance.

## Allow the New Setup Domain to Ensure Access to Salesforce Setup Pages

If your company controls users' or servers' access to the internet through firewalls or allowlists, your IT department must add \*.salesforce-setup.com to the company's list of allowed domains. Salesforce Setup pages are now hosted on that domain.

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

**When:** This change is applied on a rolling basis starting in Spring '24. The change is first enabled in sandbox and non-production orgs, then in production orgs.

SEE ALSO:

[Knowledge Article: New Setup Domain Rollout FAQ](#)

[Salesforce Help: Allow the Required Domains \(can be outdated or unavailable during release preview\)](#)


[Knowledge Article: Understand How Google's Privacy Sandbox Initiative Impacts Salesforce](#)

## Temporarily Opt Out of Google Chrome Storage Partitioning

Google Chrome storage partitioning is enabled for Salesforce domains in Summer '24. Give your company additional time to transition away from unpartitioned storage with a new setting that disables storage partitioning until September 2024.

**Where:** This feature applies to Lightning Experience and Salesforce Classic (not available in all orgs) in all editions.

**Why:** In Chrome 115, Google enforced storage partitioning in third-party contexts. Salesforce currently participates in Google's deprecation trial, which temporarily extends the use of unpartitioned storage on Salesforce domains. In Summer '24, Salesforce enables storage partitioning. This earlier rollout provides you with more time to test partitioned storage solutions, because the change can be reverted if any issues occur. For flexibility, you can use the new setting to opt out of Salesforce's rollout for now and keep unpartitioned storage until Google's deprecation trial permanently ends on September 3, 2024. After this date, Google Chrome storage partitioning is enabled regardless of the setting.

 **Note:** Google Chrome storage partitioning affects multiple web APIs, including `localStorage` and `sessionStorage`. If you use these APIs in a third-party context, replacing these APIs can require storage solutions that use the same origin or allow access across origins. To test for and resolve issues related to Google Chrome storage partitioning, updates can be required outside of Salesforce. We can't provide instructions or support for those changes.


**How:** From Setup, in the Quick Find box, enter *User Interface*, and then select **User Interface**. Select **Disable Google Chrome Storage Partitioning for Salesforce Domains**, and then save your changes. Clear all browser cookies and browser history, and then close the browser. Log into Salesforce and ensure that all functionality works properly.

## MFA Enforcement for Salesforce Orgs Is Shifting to In-App Notifications Starting in Summer '24

As we previously communicated, the contractual requirement to use multi-factor authentication (MFA) for Salesforce products is in full effect as of February 1, 2022. To help customers satisfy this requirement, Salesforce automatically enabled MFA for direct logins to existing production orgs. And starting April 2024, MFA is turned on by default for new production orgs. Because of high MFA adoption rates for products built on the Salesforce Platform, we're shifting to a new notification model instead of enforcing MFA in Summer '24.

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

**When:** Salesforce completes auto-enabling MFA for customers' orgs in Spring '24. MFA non-compliance notifications are targeted to begin in Summer '24, in lieu of the MFA enforcement milestone that was scheduled for the same release.

 **Note:** Our [forward-looking statement](#) applies to these notifications. Because roadmap items can change at any time, make your purchasing decisions based on currently available technology.

**Why:** The Salesforce program to automatically enable MFA has been extremely successful thanks to the partnership of our customers and their commitment to safeguarding user account access. Because of high adoption rates and wanting to be respectful of your time and resources, we're shifting away from the original plan to [technically enforce MFA](#). Instead we're implementing in-app notifications that appear if MFA has been disabled for a Salesforce org.

**How:** With upcoming MFA notifications, admins start receiving in-app messages if the **Require multi-factor authentication (MFA) for all direct UI logins to your Salesforce org** setting is disabled after Salesforce turns it on for your production org. These recurring messages warn that the org is out of compliance with the contractual MFA requirement and provide guidance on how to re-enable MFA. More details are coming in the *Salesforce Summer '24 Release Notes*.

 **Important:** The contractual requirement to use MFA for direct and single sign-on (SSO) logins to Salesforce orgs remains in effect. If MFA adoption rates for products built on the Salesforce Platform decline, we plan to resume the program to technically enforce MFA. This change doesn't apply to other Salesforce products where MFA is currently enforced.

### SEE ALSO:

[MFA Auto-Enablement Concludes for All Remaining Orgs \(Release Update\)](#)

[MFA Is Turned On by Default Starting April 2024](#)

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

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

## MFA Is Turned On by Default Starting April 2024

To prevent unauthorized access to Salesforce accounts, multi-factor authentication (MFA) is required when users log in. To help customers with this contractual requirement, Salesforce is making MFA a default part of the direct login process for production orgs. This change applies to production orgs created on or after April 8, 2024. It also applies to any existing production org that wasn't included in one of the MFA auto-enablement phases that occurred between Spring '23 and Spring '24. Sandbox orgs aren't affected. Orgs that are in a trial period aren't affected until they're converted to a subscription.

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

**When:** This change goes into effect on April 8, 2024.

**Why:** On their own, usernames and passwords no longer provide sufficient protection against cyberattacks. MFA is one of the simplest, most effective ways to prevent unauthorized account access and safeguard your data and your customers' data. Salesforce requires MFA to help protect against threats like phishing attacks, credential stuffing, and unauthorized account access. To learn more about the value of MFA and how it works, watch [this short video](#).

**How:** When MFA is turned on for an org, users must verify their identity with a username and password, followed by a separate verification method. Verification method options include authenticator apps, security keys, and built-in authenticators. The first time each user logs in to their org, they're guided through the steps to register a method.

There's a 30-day grace period for the org during which users can log in without MFA if they're not ready to set up a verification method. If needed, a Salesforce admin can temporarily turn off MFA by deselecting the **Require multi-factor authentication (MFA) for all direct UI logins to your Salesforce org** setting on the Identity Verification page in Setup. But keep in mind that MFA is contractually required, so re-enable it as soon as possible.

### SEE ALSO:

[MFA Enforcement for Salesforce Orgs Is Shifting to In-App Notifications Starting in Summer '24](#)

[MFA Auto-Enablement Concludes for All Remaining Orgs \(Release Update\)](#)

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

[Salesforce Help: Register for Multi-Factor Authentication \(or Get a Little More Time If You Need It\) \(can be outdated or unavailable during release preview\)](#)

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

## Experience Improved Performance on More Record Home Pages

More objects are Lightning Web Components (LWC)-enabled in Spring '24. Create, view, or edit the record home pages with improved performance, stronger accessibility support, and better service availability.

**Where:** This change applies to Lightning Experience and the Salesforce mobile app. This change doesn't apply to the Field Service mobile app.

**Why:** As part of LWC enablement at Salesforce, most 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
```

**How:** Over 120 objects are LWC-enabled in Spring '24, including `AdverseEventAction`, `IssuedCard`, `ResearchStudy`, and `Visit`. For the full list, see the [Lightning Web Components Developer Guide](#).

The following objects had this performance improvement temporarily removed to ensure no breaking changes are introduced.

- WorkOrder
- WorkOrderLineItem
- ServiceAppointment

SEE ALSO:

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

## Create From Lookup Changes

Observe several changes to the record create modal that displays when you create a record via a lookup field.

**Where:** This change previously applied to sandboxes for Lightning Experience in all editions. It now applies to sandboxes and production orgs for Lightning Experience in all editions.

**When:** This change is applied on a rolling basis starting in Spring '24. The rollout is expected to end in June 2024.

**Why:** As part of LWC enablement at Salesforce, most record home pages now render using LWC. Salesforce continues to introduce enhancements to record pages and modals, including these changes for the record create modal.

For all record pages, including LWC-enabled ones and those that still render using Aura components, when you create a record via a lookup field, the **Save & New** button no longer appears. The button continues to appear on Create and Edit modals that are not opened via a lookup field.

For LWC-enabled record pages:

- The create from lookup modal now also displays using LWC.
- The create from lookup modal is now URL addressable.
- The create from lookup modal now supports [Dynamic Forms](#).

SEE ALSO:

[Salesforce Help: Break Up Your Record Details with Dynamic Forms](#)

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

## Upgrade from Starter to Pro Suite in Your Account

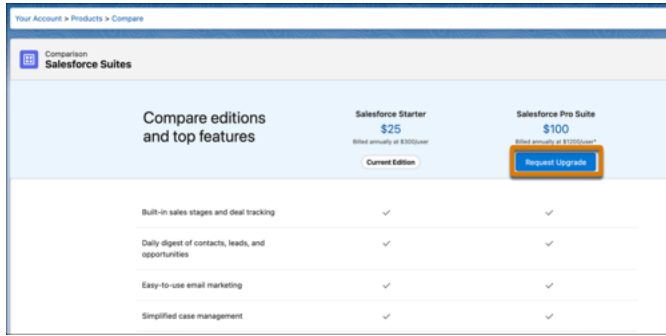
If you're a Starter customer who's ready for the power, personalization, and supercharged efficiency of Pro Suite, request an upgrade in the Product Catalog in Your Account. With Pro Suite, get everything you love from Starter plus better customization and automation options so you can grow your business quickly.

**Where:** This change applies to Lightning Experience in Salesforce Starter edition.

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

**How:** In the Your Account app, click **Browse & Buy**. On the Products page, in the Pro Suite tile, click **Compare Editions**. Then, under Pro Suite, click **Request Upgrade**.





## Find Transactions Faster with the Your Account Home Page

Improved usability on the Your Account home page directs you to the transactions you want to access, such as manage contracts and pay invoices.

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

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

## Salesforce Scheduler

Reassign multiple appointments for service resources as per your organization's business needs. Add concurrency to the topics that are added to a shift. Use Salesforce Scheduler Troubleshooter to identify and fix various setup issues and the issues that occur during appointment scheduling.

### [Optimize Resource Management by Reassigning Multiple Service Appointments](#)

Territory managers can now use the Reassign Multiple Service Appointments flow to easily reassign the service appointments. They can select a preferred service resource to reassign the service appointments to or reassign the service appointments to the service resources that Salesforce Scheduler suggests based on availability.

### [Optimize Appointments by Using Concurrency in Shifts](#)

Service resources can now attend to multiple customers during the same time slot within their shift. Define the maximum number of appointments that can be booked for the same time slot for the selected topics within the selected shift.

### [Troubleshoot Setup and Appointment Scheduling Issues](#)

Users with the out-of-the-box System Administrators profile can run the Salesforce Scheduler Troubleshooter to identify the issues related to Scheduler setup, service resource setup, and an Experience Cloud user setup. The issues can occur due to missing system permissions, object accesses, or field-level permissions, unavailable time slots, and object record validations.

### [Other Changes to Salesforce Scheduler](#)

Learn about the other small but important improvements to Salesforce Scheduler.

### [Changed Connect REST API Request Bodies](#)

These request bodies have changes.

### [Changed Connect in Apex Input Class](#)

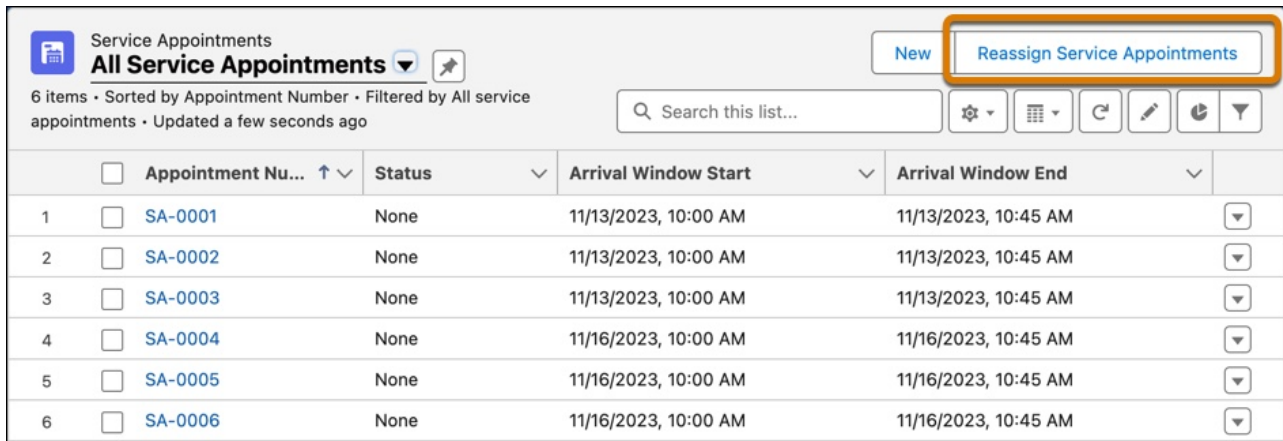
This input class has changes.

## Optimize Resource Management by Reassigning Multiple Service Appointments







Territory managers can now use the Reassign Multiple Service Appointments flow to easily reassign the service appointments. They can select a preferred service resource to reassign the service appointments to or reassign the service appointments to the service resources that Salesforce Scheduler suggests based on availability.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions where Salesforce Scheduler is enabled.

**How:** In the service appointment list view, click **Reassign Service Appointments**. Or, on a service resource's record page, click , and then click **Reassign Service Appointments**.



The screenshot shows the 'Service Appointments' list view. At the top right, there is a 'New' button and a 'Reassign Service Appointments' button, which is highlighted with an orange box. Below the buttons is a search bar and several utility icons. The main table lists 6 items with columns for Appointment Number, Status, Arrival Window Start, and Arrival Window End.

	<input type="checkbox"/>	Appointment Nu... ↑ ↓	Status ↓	Arrival Window Start ↓	Arrival Window End ↓	
1	<input type="checkbox"/>	SA-0001	None	11/13/2023, 10:00 AM	11/13/2023, 10:45 AM	
2	<input type="checkbox"/>	SA-0002	None	11/13/2023, 10:00 AM	11/13/2023, 10:45 AM	
3	<input type="checkbox"/>	SA-0003	None	11/13/2023, 10:00 AM	11/13/2023, 10:45 AM	
4	<input type="checkbox"/>	SA-0004	None	11/16/2023, 10:00 AM	11/16/2023, 10:45 AM	
5	<input type="checkbox"/>	SA-0005	None	11/16/2023, 10:00 AM	11/16/2023, 10:45 AM	
6	<input type="checkbox"/>	SA-0006	None	11/16/2023, 10:00 AM	11/16/2023, 10:45 AM	

SEE ALSO:

[Salesforce Scheduler Help: Reassign Multiple Service Appointments \(can be outdated or unavailable during release preview\)](#)

## Optimize Appointments by Using Concurrency in Shifts

Service resources can now attend to multiple customers during the same time slot within their shift. Define the maximum number of appointments that can be booked for the same time slot for the selected topics within the selected shift.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions where Automotive Cloud, Education Cloud, or Health Cloud are enabled with Salesforce Scheduler.

**How:** To configure shift concurrency, in the shift schedule view, hover over a shift card, and then click **Configure Shift Settings**. Select **Set concurrent topics**, and then define the maximum number of appointments that can be booked for the same time slot for the selected topics.

The screenshot shows the Salesforce Scheduler interface. At the top, there's a header with 'Shifts All Shifts' and a search bar. Below that, a grid shows shifts for various dates from Sunday, Dec 10 to Saturday, Dec 16. The grid is organized by 'Resources' and 'Territory Time Zone'. A specific shift for Charles King is highlighted, and a modal window is open for it. The modal displays the following details:

SFT-0007	
Start Time	End Time
12/11/2023, 10:30 AM	12/12/2023, 05:00 PM
Territory Start Time (IDT)	Territory End Time (IDT)
12/12/2023, 12:00 AM	12/13/2023, 06:30 AM
Status	Service Territory
Confirmed	Market Street Branch
Service Resource	Background Color
Charles King	

At the bottom of the modal, there are buttons for 'Edit', 'Delete', and 'Clone'. The 'Configure Shift Settings' button is highlighted with an orange box.

SEE ALSO:

[Salesforce Scheduler Help: Add Multiple Topics to a Shift \(can be outdated or unavailable during release preview\)](#)

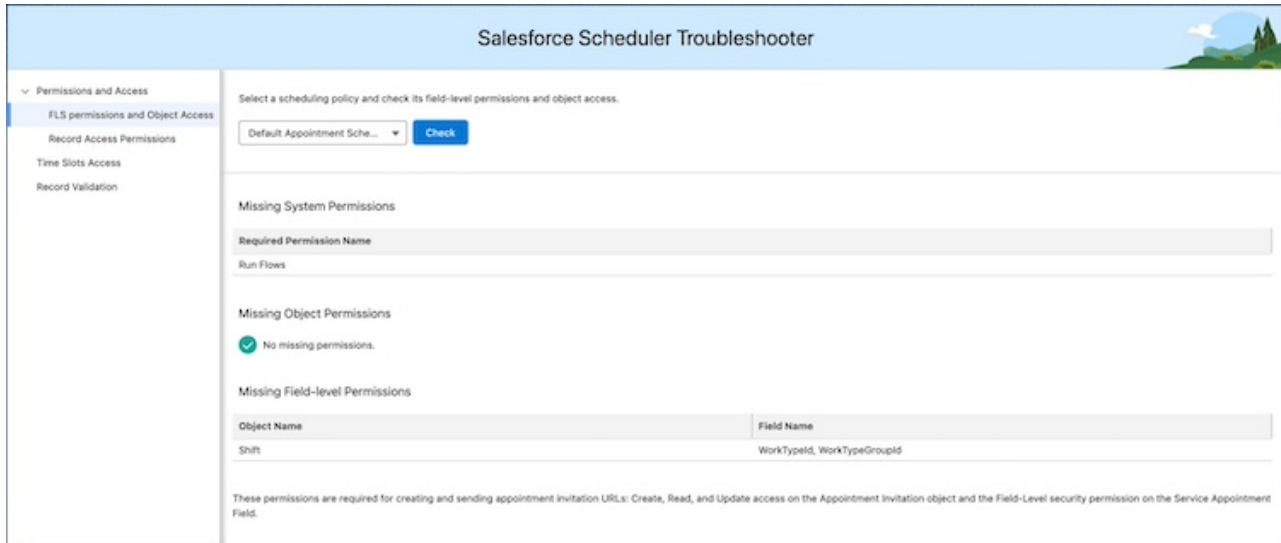
[Salesforce Scheduler Help: Appointment Time Slot Calculation for Concurrent Shifts \(can be outdated or unavailable during release preview\)](#)

## Troubleshoot Setup and Appointment Scheduling Issues

Users with the out-of-the-box System Administrators profile can run the Salesforce Scheduler Troubleshooter to identify the issues related to Scheduler setup, service resource setup, and an Experience Cloud user setup. The issues can occur due to missing system permissions, object accesses, or field-level permissions, unavailable time slots, and object record validations.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions where Salesforce Scheduler is enabled.

**How:** From Setup, in the Quick Find box, enter *Troubleshooter*, and then select **Troubleshooter** under Salesforce Scheduler.



SEE ALSO:


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

## Other Changes to Salesforce Scheduler

Learn about the other small but important improvements to Salesforce Scheduler.


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

**Why:** You can now:

- Assign users the Salesforce Scheduler Greeter Permission Set License (PSL) to manage scheduled appointments and drop-in appointments.
  -  **Note:** If you have existing users who are using lobby management, you must assign them the Salesforce Scheduler Greeter Permission Set License (PSL) for uninterrupted services.
- Update sharing settings for the Operating Hours object. The organization-wide default sharing setting for the Operating Hours object is set to Private.

For this release, Salesforce Scheduler runs a release task that automatically updates the organization-wide default sharing settings of the Operating Hours object for authenticated users. If the sharing settings aren't automatically updated to Public Read/Write, manually update them. After you verify the sharing settings, set the value of the `enableDepriveSoqlAccessOrgPref` field for the IndustriesSettings Metadata API to `true`.

Unauthenticated users of an existing org must manually create the sharing rules as per their requirements. After they create the sharing rules, they must set the value of the `enableDepriveSoqlAccessGuestUserOrgPref` field for the IndustriesSettings Metadata API to `true`.

-  **Important:** To ensure a smooth appointment booking experience, both authenticated and unauthenticated users must update the sharing settings with this release. Salesforce Scheduler will deprecate the

`enableDepriveSoqlAccessOrgPref` and `enableDepriveSoqlAccessGuestUserOrgPref` fields of the `IndustriesSettings` Metadata API in the Summer '24 release.

SEE ALSO:

[Salesforce Scheduler Help: Update the Default Operating Hours Sharing Setting](#) (can be outdated or unavailable during release preview)

[Salesforce Scheduler Help: Update Sharing Settings for Authenticated External Users Who Schedule Appointments](#) (can be outdated or unavailable during release preview)

[Salesforce Scheduler Help: Create Sharing Rules for Guest Users Who Schedule Appointments](#) (can be outdated or unavailable during release preview)

[Salesforce Scheduler Help: Lobby Management](#) (can be outdated or unavailable during release preview)

## Changed Connect REST API Request Bodies

These request bodies have changes.

### Scheduler

#### Service Appointment Input

This request body has these new properties.

- `appointmentMode`—Mode of the service appointment.
- `attendeeLimit`—Maximum number of customers that's allowed to attend the service appointment.

SEE ALSO:

[Salesforce Scheduler Developer Guide: Service Appointments](#) (can be outdated or unavailable during release preview)

## Changed Connect in Apex Input Class

This input class has changes.

### Salesforce Scheduler

#### ConnectApi.ServiceAppointmentInput

This input class has these new properties.

- `appointmentMode`—Mode of the service appointment.
- `attendeeLimit`—Maximum number of customers that's allowed to attend the service appointment.

SEE ALSO:

[Salesforce Scheduler Developer Guide: ConnectApi.ServiceAppointmentInput](#)

## Einstein Search

Work faster, complete tasks directly from the search results, and get results that are most relevant to you. Use Search Manager and Search Settings to configure search features and enhance results.

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

### [Resolve and Deflect Issues with Einstein Search Answers \(Generally Available\)](#)

Enter a question or phrase in the global search bar, knowledge sidebar, or an Experience site. Search Answers extracts the most relevant snippet from your knowledge articles to answer the question. AI-Generated Search Answers creates a summarized response tailored to your question based on knowledge articles and other sources. This feature supports English-only articles.

### [Einstein Search Is Enabled by Default](#)

Einstein Search is now enabled in all Salesforce orgs, unless your org has the DoNotAutoEnable flag turned on. You can opt out of Einstein Search features by disabling them on the Search settings page. Previously, Einstein Search wasn't enabled in orgs that didn't have the MySearchPilot and SearchAssistant permissions.

### [Define Rules to Filter Search Results Shown to End Users \(Beta\)](#)

Give your end users more relevant search results with less noise by adding field rules to your search query configuration in Search Manager. You can apply rules to global search and search in LWR Experience sites for Experience Cloud and the Lightning Knowledge component in Service Console.

### [Customize the Search Experience for Global Search, LWR Experience Sites, and the Lightning Knowledge Component \(Beta\)](#)

Configure the search experience according to the distinct needs of your end users and deliver more relevant search results. For example, you can provide a unique search experience for your customers on LWR Experience sites for Experience Cloud in one configuration. In another configuration, you can filter the results differently for your agents in the Lightning Knowledge component in the Service Console.

SEE ALSO:

[Einstein Features](#)

## Resolve and Deflect Issues with Einstein Search Answers (Generally Available)

Enter a question or phrase in the global search bar, knowledge sidebar, or an Experience site. Search Answers extracts the most relevant snippet from your knowledge articles to answer the question. AI-Generated Search Answers creates a summarized response tailored to your question based on knowledge articles and other sources. This feature supports English-only articles.

**Where:** This change applies to Lightning Experience, Lightning Knowledge, and Salesforce Experience Sites (LWR or Aura) with Lightning Knowledge enabled.

Einstein Search Answers and AI-Generated Search Answers for agents require the Einstein for Service Add-on SKU. Agent access is supported in Enterprise, Performance, and Unlimited editions. Agent Access is also supported in Einstein 1 Service Edition (formerly known as UE+).

Einstein AI-Generated Search Answers for self-service Experience Cloud sites is supported only in Einstein 1 Service Edition (formerly known as UE+).

**When:** Einstein Search Answers and AI-Generated Search Answers are available on a rolling basis starting the end of February 2024.

**How:** In Settings, select the search options that you want to enable. Enabling AI-Generated Search Answers also selects Search Answers. AI-Generated Search Answers requires standard Search Answers. Activation can take up to 24 hours.

**SETUP Settings**

Use Einstein Search to increase productivity and complete tasks directly with relevant search results. [Tell Me More](#)

**Enhance the search experience with these features at no additional cost**

- Personalization ⓘ
- Actionable Instant Results ⓘ
- Natural Language Search (requires Actionable Instant Results) ⓘ
- Einstein Search for Knowledge enhancements (requires Actionable Instant Results) ⓘ

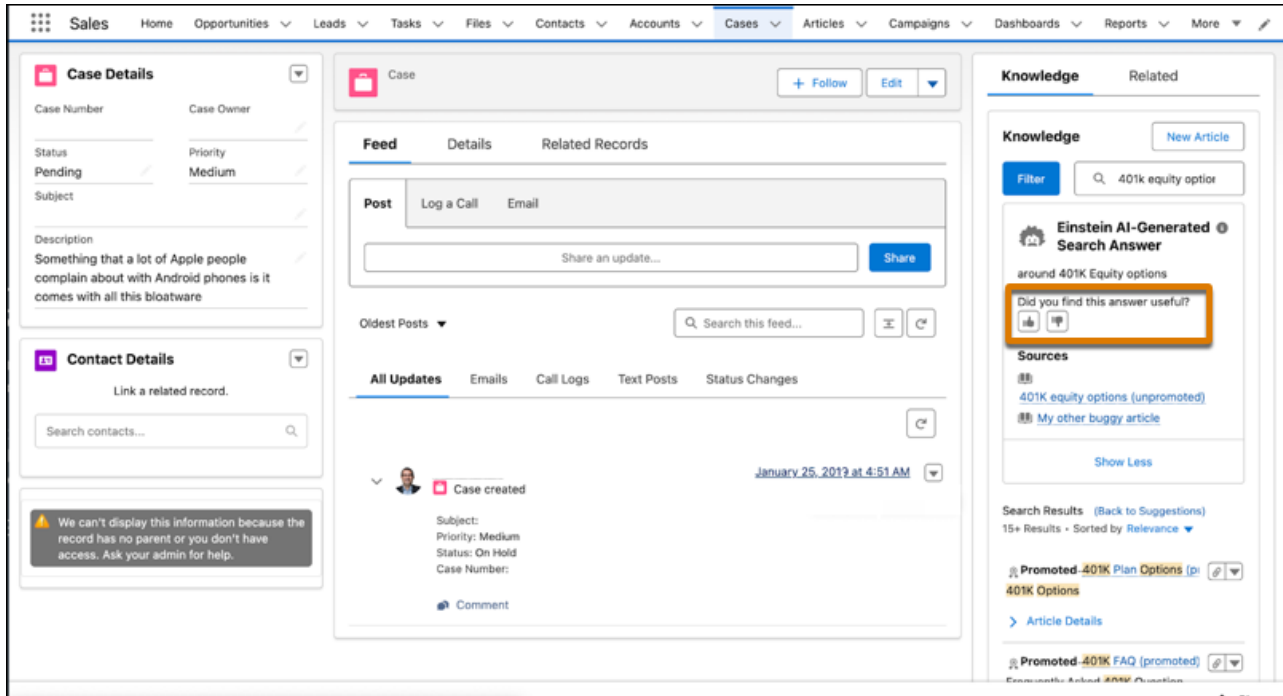
**Get the most relevant response to your question (requires Actionable Instant Results and setting user permissions)**

- Search Answers ⓘ
- AI-Generated Search Answers (requires Search Answers) ⓘ

**Get more from Einstein Search with these pilot features (requires Actionable Instant Results)**

- Natural Language Search filters (requires Natural Language Search) ⓘ

Agents and self-service users can provide feedback about the response using the thumbs-up and thumbs-down buttons.



SEE ALSO:

[Salesforce Help: Get Relevant Search Answers \(can be outdated or unavailable during release preview\)](#)

## Einstein Search Is Enabled by Default

Einstein Search is now enabled in all Salesforce orgs, unless your org has the DoNotAutoEnable flag turned on. You can opt out of Einstein Search features by disabling them on the Search settings page. Previously, Einstein Search wasn't enabled in orgs that didn't have the MySearchPilot and SearchAssistant permissions.


SEE ALSO:

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

## Define Rules to Filter Search Results Shown to End Users (Beta)

Give your end users more relevant search results with less noise by adding field rules to your search query configuration in Search Manager. You can apply rules to global search and search in LWR Experience sites for Experience Cloud and the Lightning Knowledge component in Service Console.

**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: Customize the User Search Experience in Search Manager \(can be outdated or unavailable during release preview\)](#)



## Customize the Search Experience for Global Search, LWR Experience Sites, and the Lightning Knowledge Component (Beta)

Configure the search experience according to the distinct needs of your end users and deliver more relevant search results. For example, you can provide a unique search experience for your customers on LWR Experience sites for Experience Cloud in one configuration. In another configuration, you can filter the results differently for your agents in the Lightning Knowledge component in the Service Console.

**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: Customize the Search Experience for a User Profile in Global Search \(can be outdated or unavailable during release preview\)](#)

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

[Salesforce Help: Customize the Search Experience in the Lightning Knowledge Component \(can be outdated or unavailable during release preview\)](#)

## Salesforce Data Pipelines

Preview your hierarchical data before running your recipe. Get information on when each data prep job started and was canceled.

### [Visualize Hierarchies and Flatten Transformations with Preview in the Recipe Editor](#)

Preview the results of hierarchical data in aggregate nodes and flatten transformations to ensure that you have the correct output before running your recipe. For example, if you're flattening a role hierarchy to implement row-level security on a dataset, you can preview the results to verify that they're as expected before proceeding.

### [Audit Details of Running and Canceled Data Prep Jobs](#)

Enhanced data prep job information provides details for data prep jobs that are running off schedule or why they were canceled. Now you can see when each job started, who started it, and if a job was canceled, who canceled it and when. You can also view the last person who scheduled or unscheduled a recipe or connection in the job scheduler.

### [Get More Usage Information in Data Manager](#)

Manage your data limits with more statistics on the Data Manager Usage page. New usage information includes the number of external uploads and the total number of dataflow and recipe runs in a rolling 24-hour period. You can also see the monthly count of rows output by recipes.

### [Trigger Recipes to Run When an External Connection Syncs or a CSV Uploads](#)

Set your event-based recipe schedules to run when an external connection syncs or a CSV upload finishes. Instead of being limited to one event for your trigger, you can select multiple events. Create a recipe schedule to run after a local connection syncs and after an external connection syncs, keeping your recipe up to date regardless of the input source.

### [Experience Better Recipe Error Messaging and Reliability](#)

Your recipes are now more reliable and easier to troubleshoot. If an issue occurs, the error message helps you identify the problem and resolve issues faster. In addition, if a recipe requires more resources to run successfully, the resources are automatically increased after the first failure and the job is restarted. The need for increased resources is remembered for subsequent runs. Previously, you needed to open a support case to increase a recipe's resources.

### [Connect to Amazon Athena \(Generally Available\)](#)

Sync Amazon Athena data to Data Manager by creating a remote connection.

### [Connect to Databricks \(Generally Available\)](#)

Create a remote connection using the Databricks connector to sync data from Databricks to Data Manager.

## Visualize Hierarchies and Flatten Transformations with Preview in the Recipe Editor

Preview the results of hierarchical data in aggregate nodes and flatten transformations to ensure that you have the correct output before running your recipe. For example, if you're flattening a role hierarchy to implement row-level security on a dataset, you can preview the results to verify that they're as expected before proceeding.

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

**How:** In the Data Prep recipe, select an aggregate node (1) in the graph to view the preview results (2).

Account Name	Sum of Amount	Average Amount	Rows
Cummings974 Inc	1513850	756925	2
Tran866 Inc	1882242	627414	3
Adkins907 Inc	2051038	1025519	2
Munoz724 Inc	88200	88200	1

SEE ALSO:

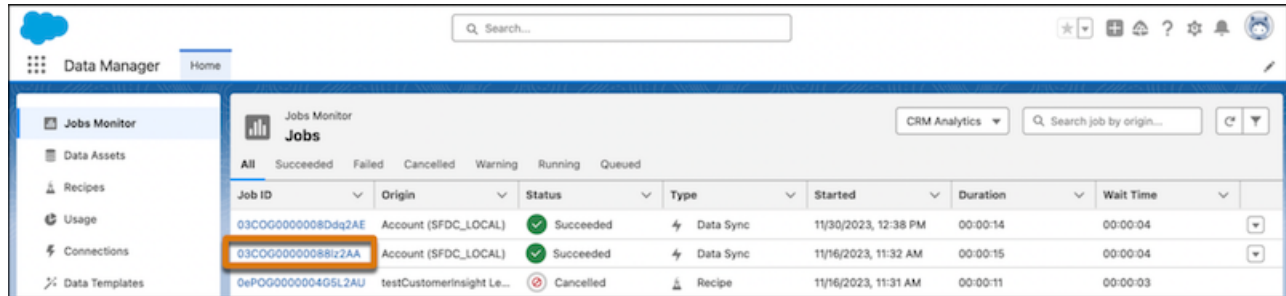
[Salesforce Help: Preview Results in a Data Prep Recipe \(can be outdated or unavailable during release preview\)](#)

## Audit Details of Running and Canceled Data Prep Jobs

Enhanced data prep job information provides details for data prep jobs that are running off schedule or why they were canceled. Now you can see when each job started, who started it, and if a job was canceled, who canceled it and when. You can also view the last person who scheduled or unscheduled a recipe or connection in the job scheduler.

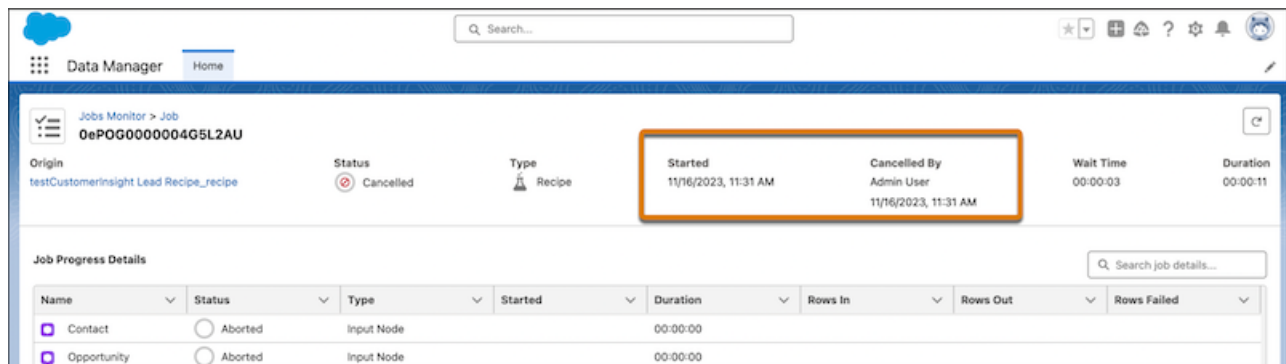
**Where:** This change applies to CRM Analytics in Lightning Experience and Salesforce Classic. CRM Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions. This change also applies to Salesforce Data Pipelines in Lightning Experience. Salesforce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

**How:** In Data Manager, on the Jobs Manager page, click the job ID to view the details.



Job ID	Origin	Status	Type	Started	Duration	Wait Time
03COG000008Ddq2AE	Account (SFDC_LOCAL)	Succeeded	Data Sync	11/30/2023, 12:38 PM	00:00:14	00:00:04
03COG0000088iz2AA	Account (SFDC_LOCAL)	Succeeded	Data Sync	11/16/2023, 11:32 AM	00:00:15	00:00:04
0ePOG000004G5L2AU	testCustomerInsight Le...	Cancelled	Recipe	11/16/2023, 11:31 AM	00:00:11	00:00:03

The Started information includes the user and start date and time. If the job was canceled, Cancelled information shows the user who canceled the job with the date and time.



Origin	Status	Type	Started	Cancelled By	Wait Time	Duration
testCustomerInsight Lead Recipe_recipe	Cancelled	Recipe	11/16/2023, 11:31 AM	Admin User 11/16/2023, 11:31 AM	00:00:03	00:00:11

Name	Status	Type	Started	Duration	Rows In	Rows Out	Rows Failed
Contact	Aborted	Input Node		00:00:00			
Opportunity	Aborted	Input Node		00:00:00			

SEE ALSO:

[Salesforce Help: Monitor a Recipe Job \(can be outdated or unavailable during release preview\)](#)

## Get More Usage Information in Data Manager

Manage your data limits with more statistics on the Data Manager Usage page. New usage information includes the number of external uploads and the total number of dataflow and recipe runs in a rolling 24-hour period. You can also see the monthly count of rows output by recipes.

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SEE ALSO:

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

## Trigger Recipes to Run When an External Connection Syncs or a CSV Uploads

Set your event-based recipe schedules to run when an external connection syncs or a CSV upload finishes. Instead of being limited to one event for your trigger, you can select multiple events. Create a recipe schedule to run after a local connection syncs and after an external connection syncs, keeping your recipe up to date regardless of the input source.

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

**How:** On the Recipes page in Data Manager, select **Schedule** from the recipes options menu. Under Schedule Mode, select **Event-based**. Select one or more options in the Run Schedule After list.

**Schedule for "Learning Adventure Learn - Join"**

Schedule mode

Time-based  Event-based

**Run Schedule After**

The Salesforce local connection syncs.

The Salesforce external connection syncs.

The selected CSVs are updated or dataflows/recipes run.

SEE ALSO:

[Salesforce Help: Schedule a Recipe to Run Automatically \(can be outdated or unavailable during release preview\)](#)

## Experience Better Recipe Error Messaging and Reliability

Your recipes are now more reliable and easier to troubleshoot. If an issue occurs, the error message helps you identify the problem and resolve issues faster. In addition, if a recipe requires more resources to run successfully, the resources are automatically increased after the first failure and the job is restarted. The need for increased resources is remembered for subsequent runs. Previously, you needed to open a support case to increase a recipe's resources.

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

## Connect to Amazon Athena (Generally Available)

Sync Amazon Athena data to Data Manager by creating a remote connection.

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

**How:** Use Data Manager to create an Amazon Athena connection. Add your AWS security credentials to the advanced properties for each connected object.

SEE ALSO:

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

## Connect to Databricks (Generally Available)

Create a remote connection using the Databricks connector to sync data from Databricks to Data Manager.

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

**How:** Use Data Manager to create a Databricks connection. Add the Databricks personal access token, server, HTTPPath, and database values to the advanced properties for each connected object.

SEE ALSO:

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

## Trust Site Enhancements

The Trust site has made some major improvements to help customers stay informed about the availability of their products at Salesforce.

**Where:** These changes apply to [Trust.salesforce.com](#) and [Status.salesforce.com](#)

We made these improvements to the Trust site.

- Added full localization for all [17 platform-supported languages](#)
- Coordinated with Salesforce Sales and Support to show products more consistently on [Salesforce Help](#) and [www.salesforce.com](#)
- Included links to [Salesforce Well-Architected Framework](#) (at the top of the page and under Resources), which provides insights and guidance from highly experienced architects
- Added a link to [Quip Prod Status](#) for easy access to Quip availability

We made these improvements to the Status site.

- Added support for [Marketing Cloud Personalization](#) and [Marketing Cloud Account Engagement](#)
- Updated the notification emails to show only your impacted instances.

**Why:** The Trust site is the place to see the status of Salesforce services, upcoming availability impacting activities, and availability-related communications. We're always working to improve the experience for our customers.

## Release Updates

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

Every time a release update is created, it gets scheduled to be enforced in a future release. We announce each update and its schedule here as soon as that schedule is known, but occasionally, updates are postponed or canceled. If that happens, we let you know in the section that describes that specific release update.

Often, release updates provide a Test Run option 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. You can view attachments in the Salesforce mobile app, but you can't edit them.

To view release updates, from Setup, in the Quick Find box, enter *Release Updates*, and select **Release Updates**.

## Enforced with This Release

These updates are scheduled to be enforced this release.

### **Enable Faster Account Sharing Recalculation by Not Storing Opportunity Implicit Child Shares (Release Update)**

To improve performance, Salesforce is changing the way that automatic account sharing recalculation works behind the scenes for the Opportunity object. Implicit child share records are no longer stored between accounts and their child opportunity records. Instead, the system determines whether users can access child opportunity records when they try to access them. This release update was first available starting in Winter '24 and is enforced in 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 Java Development Kit (JDK) locale formats in Salesforce. This update was first made available in Winter '20 and will be enforced on a rolling basis starting in Spring '24.

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

The Visualforce Remoting API uses JavaScript to directly call methods in Apex controllers from Visualforce pages. To prevent unauthorized serialization and deserialization across packaging namespaces, this update validates the `JsonAccess` annotation of your Apex classes. This update was first made available in Winter '23 and is enforced in Spring '24.

**Enforce RFC 7230 Validation for Apex RestResponse Headers (Release Update)**

When this update is enabled, regardless of API version, REST response headers defined in Apex via the `RestResponse.setHeader(name, value)` method have the header names validated based on RFC 7230. This update was available starting in Spring '23 and is enforced in Spring '24.

## 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.

**MFA Auto-Enablement Concludes for All Remaining Orgs (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 has been automatically enabling MFA for production orgs via the MFA Auto-Enablement Release Update. The first phase of this process started in Spring '23. The fourth and final phase goes into effect when Spring '24 rolls out. The final phase includes all orgs that weren't previously auto-enabled.

## 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.

**Allow Only Trusted Cross-Org Redirections (Release Update)**

To protect your users and network, limit redirections to other Salesforce orgs. Add the specific Salesforce org URLs that you trust to the Trusted URLs for Redirects allowlist. This update was first available in Winter '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. This update was first made available in Summer '23 and was scheduled to be enforced in Spring '24, but we postponed the enforcement date to Summer '24.

**Migrate to a Multiple-Configuration SAML Framework (Release Update)**

If you see this release update, your Salesforce instance is using our original single-configuration SAML framework, which supports single sign-on (SSO) with only one external identity provider. With this release update, we're removing support for the single-configuration SAML framework and supporting only the multiple-configuration SAML framework. To preserve your existing configuration, follow the steps to apply this update. If you don't, your SSO configuration stops working when this update is enforced. This update is available starting in Spring '24.

**Pass the Conversation Intelligence Rule Name as Input to a Flow (Release Update)**

This release update adds a new `ruleDevName` flow input parameter that's sent to Recommendation Strategy and autolaunched flows linked to the Conversation Intelligence rule. The input parameter contains the developer name of the rule. This update is available starting Spring '24 and is scheduled to be enforced in Summer '24.

**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 was first made available in Summer '23.

## Scheduled to Be Enforced in Winter '25

These updates are scheduled to be enforced in Winter '25. The list can include new, previously announced, and previously postponed release updates.

**Disable Access to Session IDs in Flows (Release Update)**

Salesforce previously enforced this release update in Winter '24. In some cases, the associated preferences were inadvertently reverted by user actions, requiring Salesforce to re-launch the update for a subset of users. For impacted users, this update is available in your org and is scheduled to re-enforce it in Winter '25. 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.

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

After the New Order Save Behavior is enabled, whenever an order product update causes a change to the parent order, Salesforce runs custom application logic. Previously, in this scenario, Salesforce didn't correctly evaluate custom application logic on the parent record.

**Enable Partial Save for Invocable Actions (Release Update)**

Salesforce previously enforced this release update in Spring '20. In some cases, the associated preferences were inadvertently reverted by user actions, requiring Salesforce to re-launch the update for a subset of users. For impacted users, this update is available in your org and is scheduled to re-enforce it in Winter '25. This critical update improves the behaviors and effects of failed invocable actions. It only affects external REST API calls to invocable actions done in bulk. With this update, when invoking a set of actions in a single request, a single failed invocable action no longer causes the entire transaction to fail. Without this update, if a single invocable action fails, other invocable actions within the transaction are rolled back and the entire transaction fails.

**Enforce Sharing Rules when Apex Launches a Flow (Release Update)**

When this update is enabled, an autolaunched flow that runs in the default context enforces sharing rules when an Apex class launches the flow. To enforce sharing, the Apex class must be declared using the `with sharing` keyword.

**Enforce View Roles and Role Hierarchy Permission When Editing Public List View Visibility (Release Update)**

With this update, only users with the View Roles and Role Hierarchy permission can see or select from your organization's list of roles when they edit public list view visibility. This update is available starting in Spring '24.

**Make Flows Respect Access Modifiers for Legacy Apex Actions (Release Update)**

Salesforce previously enforced this release update in Spring '21. In some cases, the associated preferences were inadvertently reverted by user actions, requiring Salesforce to re-launch the update for a subset of users. For impacted users, this update is available in your org and is scheduled to re-enforce it in Winter '25. With this release update enabled, developers can trust that their legacy Apex actions are properly protected and available only to other components in their managed packages. This update makes a flow fail if it contains a public legacy Apex action.

**Migrate from Maintenance Plan Frequency Fields to Maintenance Work Rules (Release Update)**

The Frequency and Frequency Type fields on the Maintenance Plan are being retired. To prepare for this retirement and take advantage of updated features, migrate your Frequency and Frequency Type data to Maintenance Work Rules. This update was first available in Summer '22 and was scheduled to be enforced in Winter '22, but we postponed the enforcement date to Winter '25.

**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 available in Winter '23 and enforcement was scheduled for Summer '23. We then postponed the enforcement date to Spring '24 and postponed again to Winter '25.

**Restrict User Access to Run Flows (Release Update)**

With this update enabled, Salesforce restricts a user's ability to run a flow. A user must be granted the correct profile or permission set to run the flow. When enabled, this release update deprecates the FlowSites license. With this update, flows run more securely because only users who are granted correct profiles or permission sets can run flows.

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

Salesforce previously enforced this release update in Spring '22. In some cases, the associated preferences were inadvertently reverted by user actions, requiring Salesforce to re-launch the update for a subset of users. For impacted users, this update is available in your org and is scheduled to re-enforce it in Winter '25. With this update, a flow that runs via REST API uses the running user's profile and permission sets to determine the object permissions and field-level access of the flow.

**Transition to the Lightning Editor for Email Composers in Email-to-Case (Generally Available) (Release Update)**

When enabled, this release update replaces the email editor in the docked and case feed email composers. The new email editor is generally available in Lightning Experience in Spring '24.

**Turn On Lightning Article Editor and Article Personalization for Knowledge (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.

## Scheduled to Be Enforced in Spring '25

These updates are scheduled to be enforced in Spring '25. 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 secure token in the email subject or body. If no match is found, Email-to-Case checks metadata from the email headers. This update is scheduled for enforcement in Spring '25.

**Enable Secure Redirection for Flows (Release Update)**

To protect your users and network, apply stricter validation to the flow URL parameter that determines where you redirect users after they complete a screen flow. With stricter validation, Salesforce blocks requests to redirect users to URLs that don't meet the additional validation requirements unless they're on your list of trusted URLs in Setup. When Salesforce blocks a request, users see an invalid-page redirection error. This update is available starting in Spring '25.

**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 Spring '24, but we postponed the enforcement date to Spring '25.

## 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.

### 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.

## Analytics

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Analytics enhancements include new and updated features for Lightning reports and dashboards, Data Cloud reports and dashboards, CRM Analytics, Intelligent apps, and Tableau.

### Unified Analytics Experiences

Manage folder sharing for reports and dashboards centrally in the Analytics tab. Handle your analytics in batches and apply changes simultaneously with bulk selections. Create multiple dashboard views and easily switch between them on your mobile device.

### Lightning Reports and Dashboards

Transfer Lightning dashboards to a new owner when responsibilities change by changing ownership individually or in bulk and notifying the new owner. Enhance your Lightning dashboards with images and rich text and up to five dashboard filters in all Salesforce editions. Evolve your Lightning reports more easily by updating fields in report filters, and quickly find the right report type when creating reports.

### Data Cloud Reports and Dashboards

Extend your analysis on calculated insights using Data Cloud reports. Build reports on data model objects (DMOs) the way you like with custom report types for DMOs. Use bucket columns in Data Cloud reports to group and compare data easily.

### CRM Analytics

Explore dashboards faster with improved caching, and use your data offline more confidently with exported metadata in Excel. Orchestrate your data jobs more effectively with run details and shared concurrency.

### Intelligent Analytics Apps

Optimize your sales strategy and track changes in your pipeline with Revenue Intelligence. Improve performance, monitor operations, and quickly discover top customer requests with Service Intelligence.

### 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.

### Marketing Cloud Intelligence

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

Manage folder sharing for reports and dashboards centrally in the Analytics tab. Handle your analytics in batches and apply changes simultaneously with bulk selections. Create multiple dashboard views and easily switch between them on your mobile device.

### Control Your Report and Dashboard Sharing from the Analytics Tab

The folder sharing features on the Reports and Dashboard tabs are now available on the Analytics tab. For example, when sharing a report folder, you get the same controls and granular permission settings, ensuring that your collaboration remains secure and tailored to your needs. Instead of navigating through separate tabs to share folders with customized settings, you can now manage shared content from one centralized location.

### Streamline Management of Your Dashboards With Bulk Selection

No more tedious one-by-one selections – now you can handle your dashboards in batches for improved efficiency with bulk selections. For example, you can now simultaneously change ownership for multiple dashboards to align with organizational changes, and maintain data accuracy and security.

### Analytics Mobile Apps

Saving personal views of dashboards, previously available only on desktops, is now available to mobile users.

## Control Your Report and Dashboard Sharing from the Analytics Tab

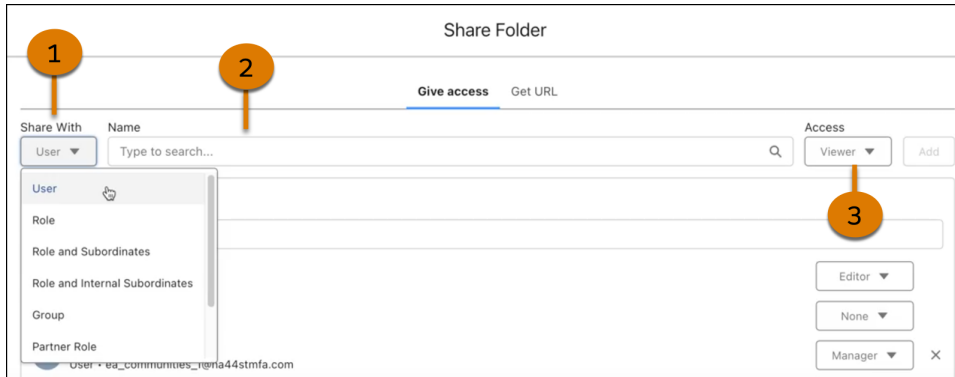
The folder sharing features on the Reports and Dashboard tabs are now available on the Analytics tab. For example, when sharing a report folder, you get the same controls and granular permission settings, ensuring that your collaboration remains secure and tailored to your needs. Instead of navigating through separate tabs to share folders with customized settings, you can now manage shared content from one centralized location.

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

**How:** From the App Launcher, find and select **Analytics**, then browse or search for a report or dashboard folder. Click the row-level action menu button for the folder, and click **Share**.



From the Give access tab, select a user, role, or group (1), search for a name (2), then assign access (3).

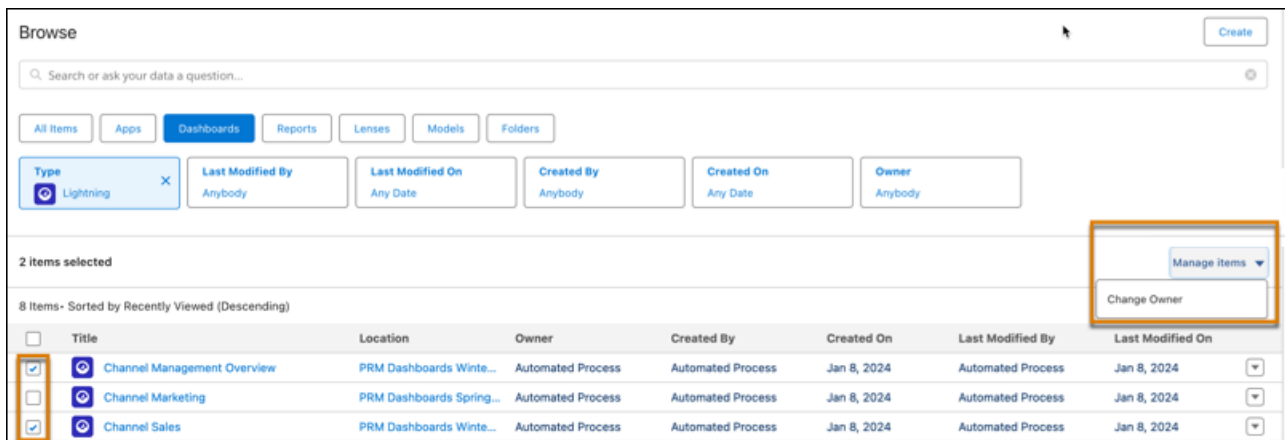


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**Where:** This change applies to Lightning Experience in Group, Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions. Access to CRM Analytics assets is available for an extra cost.

**How:** From the App Launcher, find and select **Analytics**, then browse or search for your dashboards on the Analytics tab. Click the checkbox next to the items you want to manage. To change ownership, click **Manage Items**.



## Analytics Mobile Apps

Saving personal views of dashboards, previously available only on desktops, is now available to mobile users.

### [Save Dashboard Views on Your iOS Devices](#)

The new Save View functionality enables you to save dashboard views on your iOS devices, such as a daily performance snapshot. Before this update, dashboard views could only be created on the desktop. In addition to creating views on your mobile device, you can easily switch between other saved views associated with the dashboard.

### [Save Dashboard Views on Your Android Devices](#)

The new Save View functionality enables you to save dashboard views on your Android devices, such as a daily performance snapshot. Before this update, dashboard views could only be created on the desktop. In addition to creating views on your mobile device, you can easily switch between other saved views associated with the dashboard.

## Save Dashboard Views on Your iOS Devices

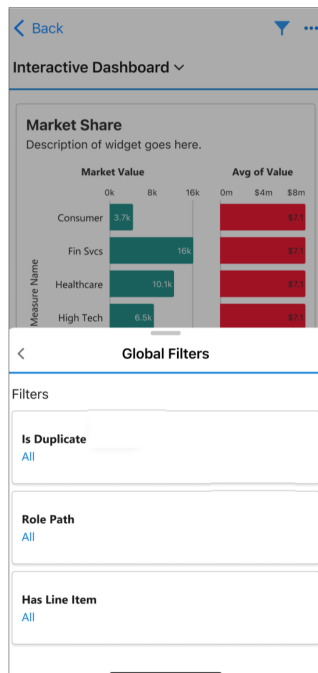
The new Save View functionality enables you to save dashboard views on your iOS devices, such as a daily performance snapshot. Before this update, dashboard views could only be created on the desktop. In addition to creating views on your mobile device, you can easily switch between other saved views associated with the dashboard.

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

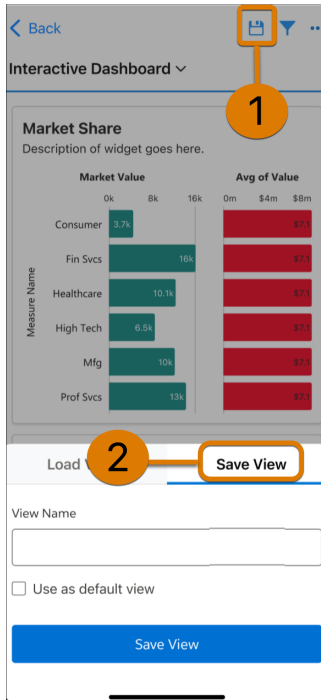
**When:** Save View is available the week of February 12, 2024.

**How:** CRM Analytics is available for devices running iOS 12.2 and later. For the latest enhancements, download CRM Analytics from the App Store.

Open a CRM Analytics dashboard on your mobile device. Create a dashboard view, such as applying filters or selecting a chart metric.



Tap **Save** then tap the Save View tab. Tap **Use as default view** for the view to automatically open with a dashboard. Type in a name for the view and tap **Save View**.



## Save Dashboard Views on Your Android Devices

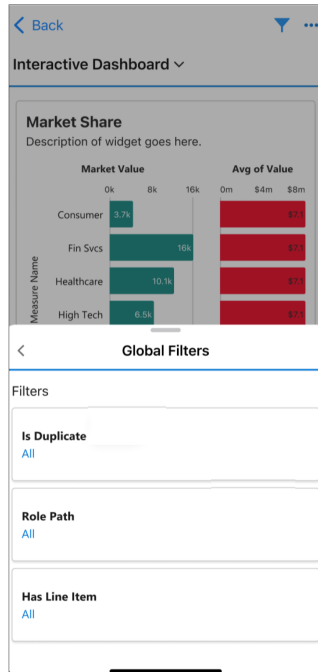
The new Save View functionality enables you to save dashboard views on your Android devices, such as a daily performance snapshot. Before this update, dashboard views could only be created on the desktop. In addition to creating views on your mobile device, you can easily switch between other saved views associated with the dashboard.

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

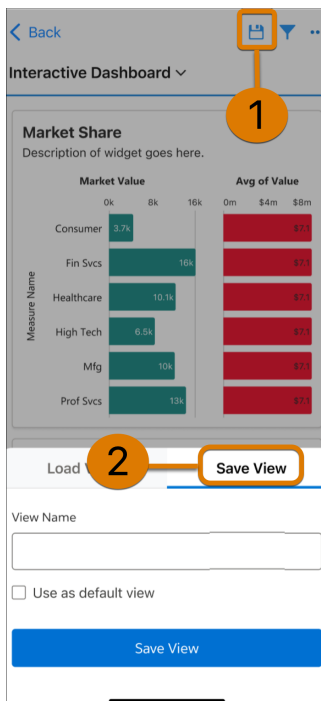
**When:** Save View is available the week of February 12, 2024.

**How:** CRM Analytics is available for devices running Android 5 or later. For the latest enhancements, download CRM Analytics from Google Play™.

Open a CRM Analytics dashboard on your mobile device. Create a dashboard view, such as applying filters or selecting a chart metric.



Tap **Save** then tap the Save View tab. Tap **Use as default view** for the view to automatically open with a dashboard. Type in a name for the view and tap **Save View**.



## Lightning Reports and Dashboards

Transfer Lightning dashboards to a new owner when responsibilities change by changing ownership individually or in bulk and notifying the new owner. Enhance your Lightning dashboards with images and rich text and up to five dashboard filters in all Salesforce editions. Evolve your Lightning reports more easily by updating fields in report filters, and quickly find the right report type when creating reports.

### [Transfer Lightning Dashboard Ownership \(Generally Available\)](#)

Transfer Lightning dashboard ownership when responsibilities change or the current owner leaves your organization. You can change the ownership of multiple dashboards at one time and can send an email notification to the new owner. Previously, you had to clone or re-create the dashboard to provide access to a new owner.

### [Supercharge Your Visualizations with Images, Rich Text, and Dashboard Widgets in All Salesforce Editions](#)

Salesforce users in all editions can now use rich text and image widgets in Lightning dashboards. Explain 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. Lightning dashboard components are now called widgets in all editions. Dashboards now support up to 25 widgets, including a maximum of 20 charts and tables, 3 images, and 25 rich text widgets. The former limit was 20 in total. Previously, this feature was available only in Unlimited Edition and Performance editions.

### [Focus Your View with More Dashboard Filters in All Salesforce Editions](#)

Users in all Salesforce editions can now refine and target dashboard data with up to five filters on Lightning dashboards. With more filters, you can reuse the same dashboard for different teams while preserving the filters that are already set up. Save time and effort and reduce dashboard redundancy by eliminating the need to clone dashboards for different teams and business units.

### [Easily Update Fields in Lightning Report Filters](#)

Save time when updating filters in response to changing reporting needs. You can now change the field in a Lightning report filter without deleting the filter and adding a new one. For example, you can change a filter on Industry to a filter on Type in a report on accounts without having to remove and recreate the filter and filter logic. In earlier releases, you could change the operator and value but not the field. Previously, this feature was available only in Salesforce Classic.

### [Rearrange Multiple Lightning Report Columns at Once](#)

Now you can move multiple columns in the Lightning report builder at the same time. Previously, this feature was available only in Salesforce Classic.

### [Filter Report Types by Objects or Fields in Enterprise and Performance Editions](#)

Ensure the Lightning reports that you create contain the data you need without trial and error. Enterprise and Performance Edition users can now quickly find all the report types that include specific Salesforce objects or fields. For example, if you're building a report that needs to include the Age field on the Case object and the SLA field on the Account object, add those fields to the report type filter to see report types that include those fields. You can filter report types by up to 20 objects or fields. You can't filter by fields included in a lookup or part of a composite field, such as geolocation or address. Previously, this feature was available only in Unlimited Edition.

### [Access Report and Dashboard Subscriptions with Slack Slash Commands](#)

Reduce context switching and increase workflow efficiency and collaboration with the new way to view and configure Lightning reports and dashboards subscriptions. Wherever you are in Slack, you can enter a slash command that opens a window for managing subscriptions, including adding and removing recipients. Previously, you could manage these items only within the CRM Analytics for Slack app.

## Transfer Lightning Dashboard Ownership (Generally Available)

Transfer Lightning dashboard ownership when responsibilities change or the current owner leaves your organization. You can change the ownership of multiple dashboards at one time and can send an email notification to the new owner. Previously, you had to clone or re-create the dashboard to provide access to a new owner.

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

**How:** To reassign a single dashboard, on the Dashboards or Analytics tabs select **Change Owner** from the dashboard's actions.

DASHBOARDS	Dashboard Name	Folder	Created By	Created On
Recent	Regional Sales	Company Dashboards	Linda Rosenberg	20/07/2022, 4:05 am
Created by Me	Team Opportunities	Private Dashboards	Jose Figueroa	11/12/2023, 9:51 am
Private Dashboards	Follow up Timings	Private Dashboards	Jose Figueroa	22/08/2023, 3:24 pm
	Deal Lifecycle Details	Private Dashboards	Jose Figueroa	05/03/2023, 8:52 am
All Dashboards	Stale Activities	Company Dashboards	Linda Rosenberg	11/12/2023, 11:47 am
FOLDERS	Pipeline (modified)	Private Dashboards	Jose Figueroa	08/09/2022, 11:52 pm
All Folders	Pipeline	Private Dashboards	Jose Figueroa	27/07/2022, 4:48 am
Created by Me	Engagement	Community Metrics	Erica Douglass	17/12/2022, 12:24 am
Shared with Me	Pipeline (modified, again)	Private Dashboards	Jose Figueroa	13/09/2022, 2:01 am
	Winter Promo	Private Dashboards	Jose Figueroa	07/11/2023, 3:23 pm
FAVORITES	Alternate Social Channel Impact	Community Metrics	Erica Douglass	06/01/2023, 10:30 pm

When someone leaves your organization, you can reassign all their dashboards on the Analytics tab. Select the dashboards, and then in the Manage Items menu, select **Change Owner**.

Browse

Search reports, dashboards, and more, then press Enter

All Items Dashboards Reports Folders

Last Modified By: Anybody | Last Modified On: Any Date | Created By: Anybody | Created On: Any Date | Owner: Anybody

2 items selected

200 Items • Sorted by Recently Viewed (Descending)

<input type="checkbox"/>	Title	Location	Owner	Created By	Created On	Last Modified By	Last Modified On
<input checked="" type="checkbox"/>	Regional Sales	Company Dashboards	Jose Figueroa	Linda Rosenberg		Jose Figueroa	9 Nov 2023
<input checked="" type="checkbox"/>	Team Opportunities	Private Dashboards	Jose Figueroa	Jose Figueroa	11 Dec 2023	Jose Figueroa	8 hours ago
<input type="checkbox"/>	Follow up Timings	Private Dashboards	Jose Figueroa	Jose Figueroa		Jose Figueroa	3 Oct 2023
<input type="checkbox"/>	Deal Lifecycle Details	Private Dashboards	Jose Figueroa	Jose Figueroa	5 Mar 2023	Jose Figueroa	
<input type="checkbox"/>	Stale Activities	Company Dashboards	Jose Figueroa	Linda Rosenberg	11 Dec 2023	Jose Figueroa	11 Dec 2023

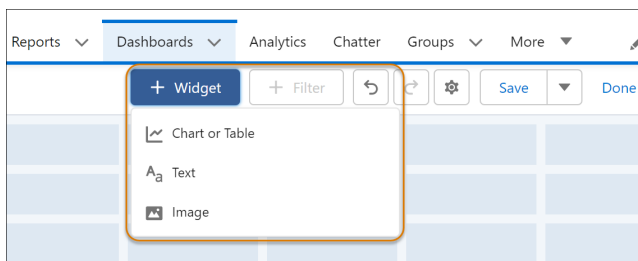
To notify the new owner, select **Send email notification** in the Change Owner window.

## Supercharge Your Visualizations with Images, Rich Text, and Dashboard Widgets in All Salesforce Editions

Salesforce users in all editions can now use rich text and image widgets in Lightning dashboards. Explain 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. Lightning dashboard components are now called widgets in all editions. Dashboards now support up to 25 widgets, including a maximum of 20 charts and tables, 3 images, and 25 rich text widgets. The former limit was 20 in total. Previously, this feature was available only in Unlimited Edition and Performance editions.

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

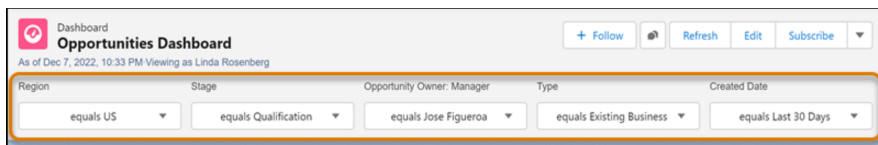
Image widget settings, like tile, stretch, and fit to height, aren't applied to dashboards delivered through email subscriptions. The image is shown at the original resolution within the widget.

## Focus Your View with More Dashboard Filters in All Salesforce Editions

Users in all Salesforce editions can now refine and target dashboard data with up to five filters on Lightning dashboards. With more filters, you can reuse the same dashboard for different teams while preserving the filters that are already set up. Save time and effort and reduce dashboard redundancy by eliminating the need to clone dashboards for different teams and business units.

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

**How:** For example, previously, if you filtered on Stage, Opportunity Owner, and Type, you couldn't add a Region filter to reuse the dashboard for all your teams. Now you can include the Region filter and even have room for a Created Date filter.

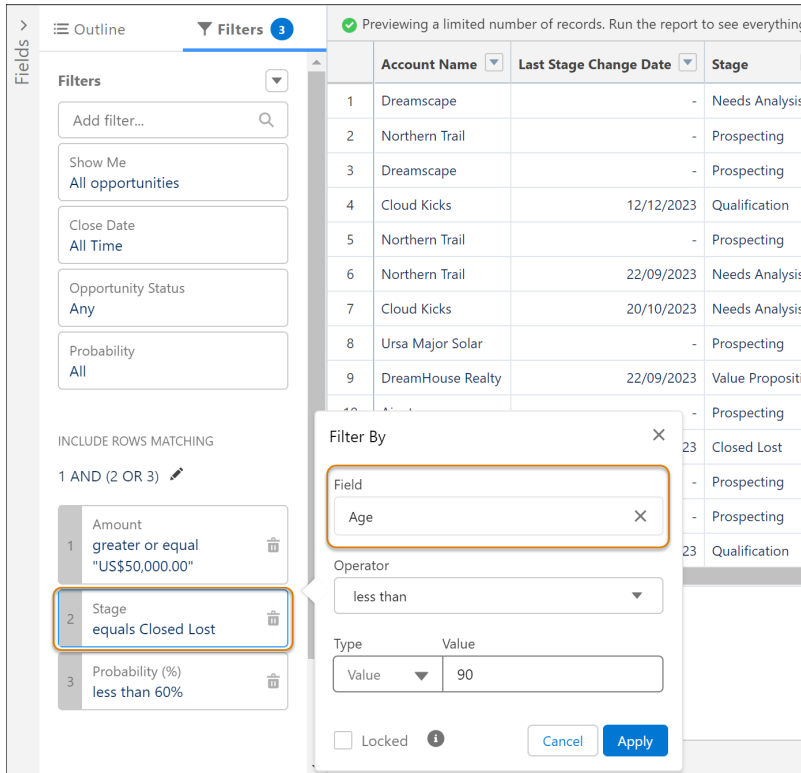


## Easily Update Fields in Lightning Report Filters

Save time when updating filters in response to changing reporting needs. You can now change the field in a Lightning report filter without deleting the filter and adding a new one. For example, you can change a filter on Industry to a filter on Type in a report on accounts without having to remove and recreate the filter and filter logic. In earlier releases, you could change the operator and value but not the field. Previously, this feature was available only in Salesforce Classic.

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

**How:** In the Filter By window, change the field, operator, or value.

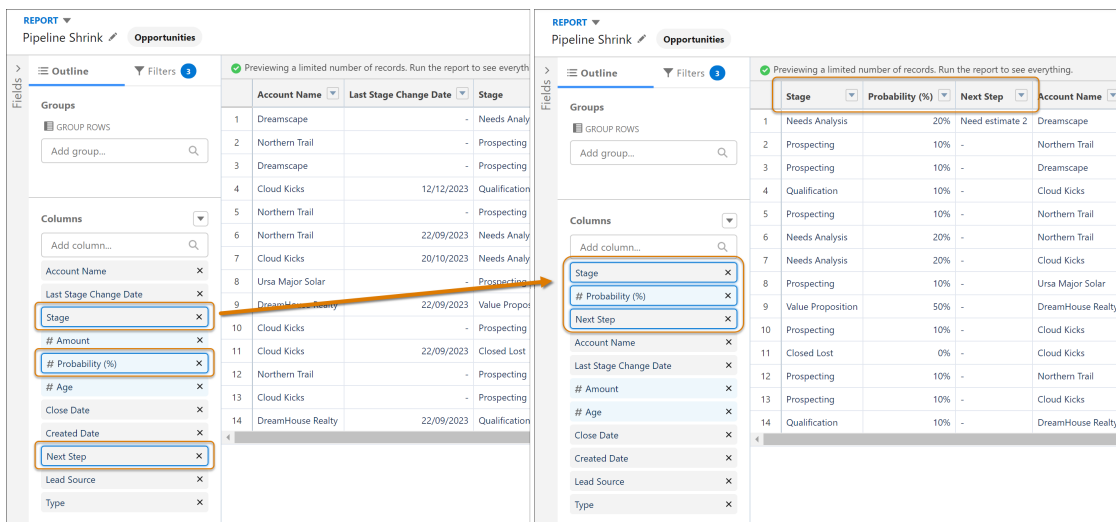


## Rearrange Multiple Lightning Report Columns at Once

Now you can move multiple columns in the Lightning report builder at the same time. Previously, this feature was available only in Salesforce Classic.

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

**How:** In the Lightning report builder, select the columns in the report table or Columns list and drag them to the new location.

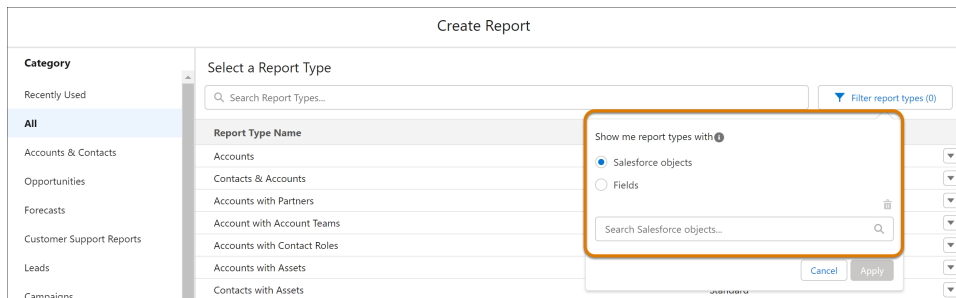


## Filter Report Types by Objects or Fields in Enterprise and Performance Editions

Ensure the Lightning reports that you create contain the data you need without trial and error. Enterprise and Performance Edition users can now quickly find all the report types that include specific Salesforce objects or fields. For example, if you're building a report that needs to include the Age field on the Case object and the SLA field on the Account object, add those fields to the report type filter to see report types that include those fields. You can filter report types by up to 20 objects or fields. You can't filter by fields included in a lookup or part of a composite field, such as geolocation or address. Previously, this feature was available only in Unlimited Edition.

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

**How:** In the Create Report window, click **Filter report types**, and select either Salesforce objects or fields to search.



## Access Report and Dashboard Subscriptions with Slack Slash Commands

Reduce context switching and increase workflow efficiency and collaboration with the new way to view and configure Lightning reports and dashboards subscriptions. Wherever you are in Slack, you can enter a slash command that opens a window for managing subscriptions, including adding and removing recipients. Previously, you could manage these items only within the CRM Analytics for Slack app.

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

**How:** To access report subscriptions, enter `/analytics-lx-rpt-subscriptions` in the Slack message field.

To access dashboard subscriptions, enter `/analytics-lx-db-subscriptions` in the Slack message field.

SEE ALSO:

[Salesforce Help: Subscribe to Lightning Reports and Dashboards in Slack](#)

[Salesforce Help: Import and Add Recipients to Lightning Report and Dashboard Subscriptions](#)

## Data Cloud Reports and Dashboards

Extend your analysis on calculated insights using Data Cloud reports. Build reports on data model objects (DMOs) the way you like with custom report types for DMOs. Use bucket columns in Data Cloud reports to group and compare data easily.

[Analyze Calculated Insights in Data Cloud Reports](#)

Build a standard Data Cloud report on a calculated insight object to surface patterns from segmented data or precalculated metrics. For example, focus your marketing efforts with a report on a calculated insight that ranks web traffic sources and shows a breakdown for each product category. When you create a report on a single calculated insight object, the Report Builder recognizes the calculated insight's measures as columns and its dimensions as groups. You can then easily visualize the data as a chart, group the report on dimensions, and add the report as a widget to a dashboard.

### [Tailor Reports on Data Model Objects with Custom Report Types](#)

Set up a custom report type on data model objects (DMOs) so that you can build reports with the most pertinent fields and records from Data Cloud. For example, create a custom report type that combines Individual and Segment membership DMOs to identify individuals who are active members within each segment. You can join up to four DMOs in a single custom report type and design its field layout in an easy-to-use interface. Add fields from any related object to the report via the lookup relationship.

### [Discover Trends over Time Using Standard Fiscal Calendar Options](#)

If your organization uses the standard fiscal year, you can group, sort, and filter your Data Cloud data model object (DMO) reports by fiscal week, month, year, or quarter. For example, in a sales order DMO report, group your customer spend by the standard fiscal quarter to compare seasonal spending habits. Or, review your loyalty program's performance for the current fiscal year by filtering the program DMO report by calendar year.

### [Easily Categorize Data Cloud Records with Bucket Columns](#)

Organize Data Cloud records into groups without the hassle of creating a formula or custom field. Create bucket columns in a Data Cloud Data Model Object report to define multiple categories or ranges for the same measure or dimension. For example, get a better understanding of your customers from the Unified Individuals DMO by bucketing email engagement scores into Low, Medium, and High ranges. You can bucket Data Cloud reports on numeric, picklist, and text data types and sort, filter, or group the report based on the bucket column.

### [Perform Calculations Using Functions and Formulas](#)

You can now apply most of the math, date and time, and logical functions to date and numeric columns in Data Cloud reports. Easily derive advanced insights in near real time by applying functions to summary or row-level formula fields. For example, create a row-level formula to calculate the number of days since the last web activity in a customer engagement calculated insight report.

## Analyze Calculated Insights in Data Cloud Reports

Build a standard Data Cloud report on a calculated insight object to surface patterns from segmented data or precalculated metrics. For example, focus your marketing efforts with a report on a calculated insight that ranks web traffic sources and shows a breakdown for each product category. When you create a report on a single calculated insight object, the Report Builder recognizes the calculated insight's measures as columns and its dimensions as groups. You can then easily visualize the data as a chart, group the report on dimensions, and add the report as a widget to a dashboard.

**Where:** This change applies to Data Cloud in Developer, Enterprise, Performance, and Unlimited editions.

**How:** On the Reports tab, click **New Report**. In the Data Cloud report category, select a calculated insight as the record type, and click **Start Report**.

**Report: Lead Source Ranking Calculated Insight**  
**New Lead Source Rankings Report**

LeadSource	NextStep	TopRank
Advertisement	Close the deal!	1.000000
	Closed!	1.000000
	<b>Subtotal</b>	-
Partner	-	2.000000
	Meet at Widget Conference	2.000000

SEE ALSO:

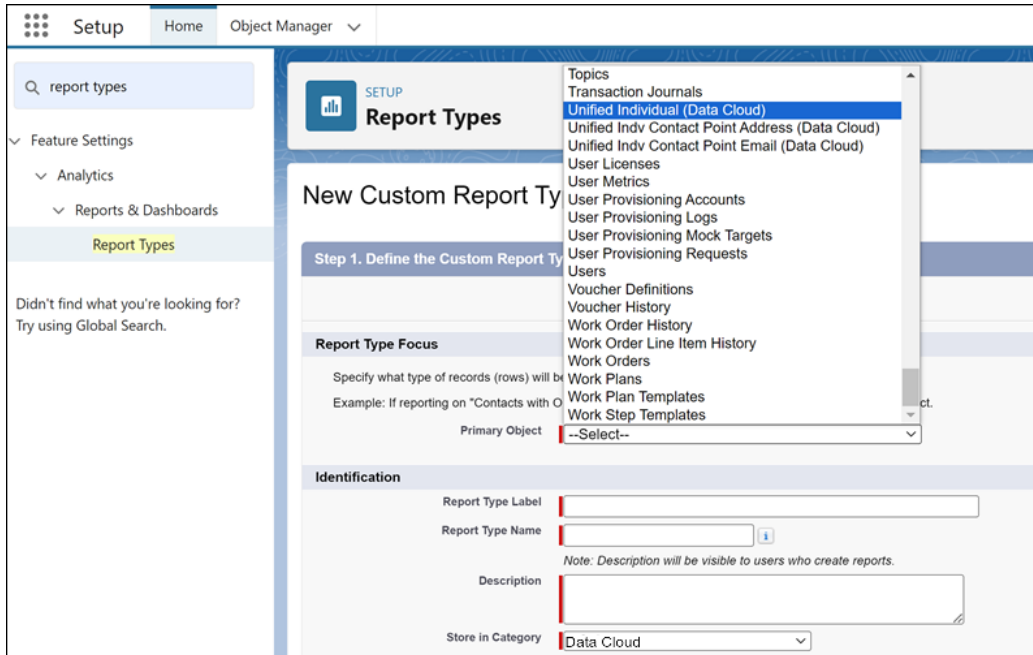
[Salesforce Help: Build a Report in Lightning Experience \(can be outdated or unavailable during release preview\)](#)

## Tailor Reports on Data Model Objects with Custom Report Types

Set up a custom report type on data model objects (DMOs) so that you can build reports with the most pertinent fields and records from Data Cloud. For example, create a custom report type that combines Individual and Segment membership DMOs to identify individuals who are active members within each segment. You can join up to four DMOs in a single custom report type and design its field layout in an easy-to-use interface. Add fields from any related object to the report via the lookup relationship.

**Where:** This change applies to Data Cloud in Developer, Enterprise, Performance, and Unlimited editions.

**How:** From Setup, in the Quick Find box, enter *Report Types*, and then click **New Custom Report Type**.



For the report type, select a Data Cloud DMO as the primary object, and specify the report's Store-in category. Set the report's object relationships, and specify the fields that you want to display.

SEE ALSO:

[Salesforce Help: Create a Custom Report Type \(can be outdated or unavailable during release preview\)](#)

## Discover Trends over Time Using Standard Fiscal Calendar Options

If your organization uses the standard fiscal year, you can group, sort, and filter your Data Cloud data model object (DMO) reports by fiscal week, month, year, or quarter. For example, in a sales order DMO report, group your customer spend by the standard fiscal quarter to compare seasonal spending habits. Or, review your loyalty program's performance for the current fiscal year by filtering the program DMO report by calendar year.

**Where:** This change applies to Data Cloud in Developer, Enterprise, Performance, and Unlimited editions.

**How:** In Data Cloud Setup, select **Data Management > Fiscal Calendar**, and set the standard fiscal calendar for each data space.


The screenshot shows the Data Cloud Reports interface. At the top, there's a navigation bar with 'Data Cloud', 'Home', 'Data Streams', 'Analytics', 'Reports', 'Data Lake Objects', and 'Data'. Below this, the report title is 'Unified Individual Report' with a sub-label 'CustomIndividual'. The interface is in edit mode, showing a 'Fields' sidebar on the left with 'Groups' and 'Columns' sections. The main area displays a table with columns 'Created Date', 'Name', and 'Id'. A dropdown menu is open over the 'Created Date' column, showing options like 'Sort Ascending', 'Sort Descending', 'Sort By...', 'Group Date By...', 'Make a Detail Column', and 'Remove Group'. The 'Fiscal Quarter' option is highlighted with an orange box. The table data includes a 'Subtotal' row and records for 6/9/2023 and 6/8/2023.

Created Date	Name	Id
6/9/2023 (1)		
	Phillina Ober	9128
	Delfina Latchford	8930
Subtotal		
6/8/2023 (1)	David Bremer	312016009
	Arthur Pritchep	371122979
	Sylvia Foulston	461656737
	Sibella Parks	780718943
	Roland Fjeld	865949958

## Easily Categorize Data Cloud Records with Bucket Columns

Organize Data Cloud records into groups without the hassle of creating a formula or custom field. Create bucket columns in a Data Cloud Data Model Object report to define multiple categories or ranges for the same measure or dimension. For example, get a better understanding of your customers from the Unified Individuals DMO by bucketing email engagement scores into Low, Medium, and High ranges. You can bucket Data Cloud reports on numeric, picklist, and text data types and sort, filter, or group the report based on the bucket column.

**Where:** This change applies to Data Cloud in Developer, Enterprise, Performance, and Unlimited editions.

**How:** In edit mode, on the column that you want to bucket, click  and select **Add Bucket Column**.

Previewing a limited number of records. Run the report to see everything.

	Opportunity Name	Next Step	Lead Source	Amount	Probability (%)	Age	Created Date
1	DCR Oppty	-	-	-	5		
2	Acme - 1,200 Widgets	Need estimate	Trade Show	\$140,000.00	5		
3	salesforce.com - 2,000 Widgets	Meet at Widget Conference	Partner	\$20,000.00	5		
4	Acme - 200 Widgets	Need estimate	Word of mouth	\$20,000.00	1		
5	salesforce.com - 5000 Widgets	Closed!	Advertisement	\$500,000.00	10		

Group Rows by This Field  
Group Columns by This Field  
Summarize  
**Bucket This Column**  
Hide Unique Count

	Opportunity Name	Next Step	Lead Source	Amount	Probability (%)	Age
<input type="checkbox"/>	Percentage Bucketing Column					
<input type="checkbox"/>	Less than 10% (1)					
<input type="checkbox"/>	10 to 50% (4)					
<input type="checkbox"/>	Greater than 50% (3)					

	Opportunity Name	Next Step	Lead Source	Amount	Probability (%)	Age
	Acme - 200 Widgets	Need estimate	Word of mouth	\$20,000.00	10%	148
	DCR Oppty	-	-	-	50%	116
	Acme - 1,200 Widgets	Need estimate	Trade Show	\$140,000.00	50%	148
	Acme - 600 Widgets	Need estimate	Trade Show	\$70,000.00	20%	148
	salesforce.com - 2,000 Widgets	Meet at Widget Conference	Partner	\$20,000.00	50%	148
	salesforce.com - 5000 Widgets	Closed!	Advertisement	\$500,000.00	100%	0
	Global Media - 400 Widgets	-	Partner	\$40,000.00	60%	148
	salesforce.com - 1,000 Widgets	Close the deal!	Advertisement	\$100,000.00	90%	148
<b>Total</b>	<b>(8)</b>					

Row Counts  Detail Rows  Subtotals  Grand Total

SEE ALSO:

[Salesforce Help: Categorize Data with Bucket Columns \(can be outdated or unavailable during release preview\)](#)

## Perform Calculations Using Functions and Formulas

You can now apply most of the math, date and time, and logical functions to date and numeric columns in Data Cloud reports. Easily derive advanced insights in near real time by applying functions to summary or row-level formula fields. For example, create a row-level formula to calculate the number of days since the last web activity in a customer engagement calculated insight report.

**Where:** This change applies to Data Cloud in Developer, Enterprise, Performance, and Unlimited editions.

**How:** From a report's column section, click . Add a summary or row-level formula to your report. Build the formula using the functions available in the Functions pane. Apply your changes when done.

Edit Row-Level Formula Column

Einstein Fields **Functions**

Search Functions

- Date & Time (22)
- Logical (10)
- Math (22)

**DATE(year,month,day)**  
Learn More in Help  
Insert >

\* Column Name: Web engagement    Description: # of days since last web a

Formula Output Type: Number    Decimal Points: 2

\* Formula

1 Type your formula here.

Validate

Cancel    Apply



Data Cloud reports support these functions.

<b>Date and Time Functions</b>	<b>Logical Functions</b>	<b>Math Functions</b>
ADDMONTHS	AND	ABS
DATE	BLANKVALUE	ACOS
DATEVALUE	CASE	ASIN
DATETIMEVALUE	IF	ATAN
DAY	ISBLANK	ATAN2
DAYOFYEAR	ISNULL	CEILING
FORMATDURATION	ISNUMBER	COS
FROMUNIXTIME	NOT	EXP
HOUR	NULLVALUE	FLOOR
ISOWEEK	OR	LN
ISOYEAR		LOG
MILLISECOND		MAX
MINUTE		MCEILING
MONTH		MFLOOR
NOW		MIN
SECOND		MOD
TIMENOW		PI
TIMEVALUE		ROUND
TODAY		SIN
UNIXTIMESTAMP		SQRT
WEEKDAY		TAN
YEAR		TRUNC

SEE ALSO:

[Salesforce Help: Evaluate Report Data with Formulas \(can be outdated or unavailable during release preview\)](#)

## CRM Analytics

Explore dashboards faster with improved caching, and use your data offline more confidently with exported metadata in Excel. Orchestrate your data jobs more effectively with run details and shared concurrency.

### [Analytics Experience and Visualizations](#)

Experience more responsive dashboards that load faster with improved caching. Download data to Excel files that include metadata about the export.

### [Analytics Data Integration](#)

Preview your hierarchical data before running your recipe. Allocate your concurrent data prep jobs to meet your orchestration needs. Get information on when each data prep job started and was canceled.

## Analytics Experience and Visualizations

Experience more responsive dashboards that load faster with improved caching. Download data to Excel files that include metadata about the export.

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

Your dashboards are now more responsive and load faster with improved caching. Dashboard query results are now cached, increasing performance with fewer calls to the server.

### [Download Metadata from Lenses and Widgets](#)

Extract detailed insights and user-specific metadata that supports collaboration and informed decision-making through organized export files. With the new export option in CRM Analytics, you can download data from a lens or widget to an Excel file that contains information about the export. The Excel format with metadata can include the name of the user, the date and time of the export, dashboard and widget titles, groups and filters in the query, and the number of records downloaded.

### [Embed CRM Analytics Dashboards in LWR Sites \(Beta\)](#)

Let your customers view and interact with CRM Analytics dashboards in your Lightning Web Runtime (LWR) site by adding the CRM Analytics Dashboard component. For example, customers can view visualizations of account data alongside their account information.

### [Get More Functionality with the New Dashboard Lightning Web Component \(Beta\)](#)

Embed your CRM Analytics dashboards in Lightning Experience pages with the new, native CRM Analytics Dashboard Lightning web component. The component works seamlessly in Lightning Experience pages and LWR sites.

### [Create More Efficient Queries with Semi-Joins and Anti-Joins \(Generally Available\)](#)

Create cleaner queries with better performance and stop worrying about filter item limitations. Generate semi-join or anti-join results from different datasets in a single SAQL query using the `join` statement with a `join_type` specifier.

## Get Improved Dashboard Performance with Better Caching

Your dashboards are now more responsive and load faster with improved caching. Dashboard query results are now cached, increasing performance with fewer calls to the server.

**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.

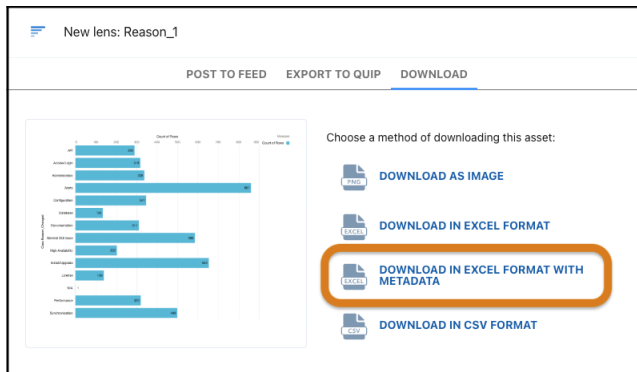
**How:** Improved dashboard caching in the default behavior. If necessary, you can turn it off. From Setup, in the Quick Find box, enter *Analytics*, and select **Settings**. Select **Disable dashboard query caching**.

## Download Metadata from Lenses and Widgets

Extract detailed insights and user-specific metadata that supports collaboration and informed decision-making through organized export files. With the new export option in CRM Analytics, you can download data from a lens or widget to an Excel file that contains information about the export. The Excel format with metadata can include the name of the user, the date and time of the export, dashboard and widget titles, groups and filters in the query, and the number of records downloaded.

**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 access the new export option, select **Share** on a lens or dashboard widget and then click the Download tab.



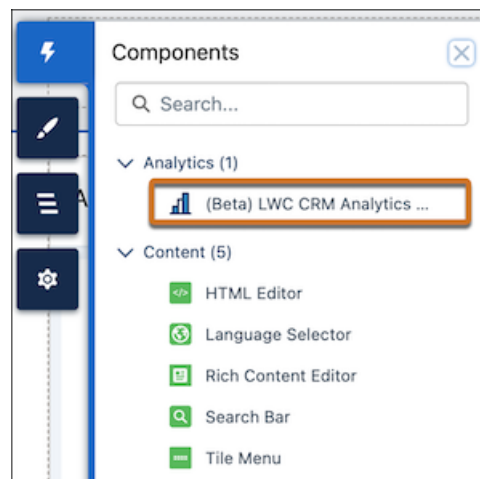
## Embed CRM Analytics Dashboards in LWR Sites (Beta)

Let your customers view and interact with CRM Analytics dashboards in your Lightning Web Runtime (LWR) site by adding the CRM Analytics Dashboard component. For example, customers can view visualizations of account data alongside their account information.

**Where:** This change applies to CRM Analytics in [LWR sites](#) accessed through Lightning Experience and Salesforce Classic. CRM Analytics is available in Developer Edition and for an extra cost in Enterprise and Performance editions, and requires an Experience Cloud license.

 **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 new CRM Analytics Dashboard Lightning web component in your Experience Cloud pages. From the component palette of an object detail page in Experience Builder, drag the dashboard component to the page.



SEE ALSO:


[Salesforce Help: Objects Supported by Out-of-the-Box Components and Pages in Experience Builder Templates \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Standard Components for LWR Templates \(can be outdated or unavailable during release preview\)](#)

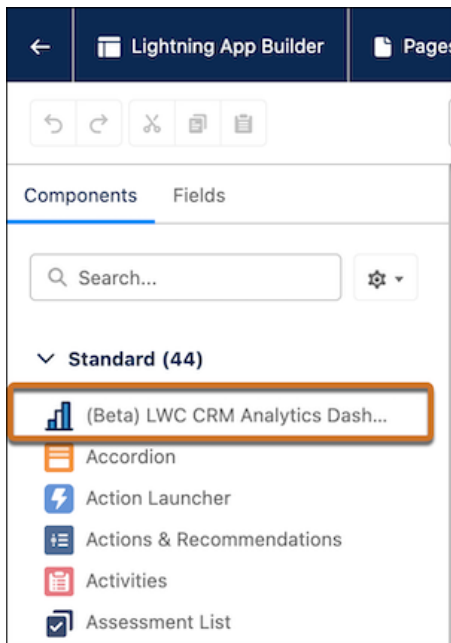
## Get More Functionality with the New Dashboard Lightning Web Component (Beta)

Embed your CRM Analytics dashboards in Lightning Experience pages with the new, native CRM Analytics Dashboard Lightning web component. The component works seamlessly in Lightning Experience pages and LWR sites.

**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:** Open Lightning App Builder for the page you want to edit. Find **(Beta) LWC CRM Analytics Dashboard** in the component palette and drag it onto the page.



SEE ALSO:

[Salesforce Help: Embed Dashboards in Lightning Pages \(can be outdated or unavailable during release preview\)](#)

## Create More Efficient Queries with Semi-Joins and Anti-Joins (Generally Available)

Create cleaner queries with better performance and stop worrying about filter item limitations. Generate semi-join or anti-join results from different datasets in a single SAQL query using the `join` statement with a `join_type` specifier.

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

**How:** Use the CRM Analytics SAQL editor to create your queries.

This example uses a semi-join statement to query for accounts with more than 10 opportunities.

```
account = load \"accounts\";
opp = load \"opportunities\";
opp = group opp by accountId;
opp = foreach opp generate accountId, count() as count;
```

```
opp = filter opp by count > 10;  
q = join account by (id) semi, opp by (accountId)
```

This examples uses an anti-join statement to query for accounts with no opportunities.

```
account = load \"accounts\";  
opp = load \"opportunities\";  
q = join account by (id) anti, opp by (accountId)
```

SEE ALSO:

[Analytics SAQL Developer Guide: join semi and anti](#)(can be outdated or unavailable during release preview)

## Analytics Data Integration

Preview your hierarchical data before running your recipe. Allocate your concurrent data prep jobs to meet your orchestration needs. Get information on when each data prep job started and was canceled.

### [Visualize Hierarchies and Flatten Transformations with Preview in the Recipe Editor](#)

Preview the results of hierarchical data in aggregate nodes and flatten transformations to ensure that you have the correct output before running your recipe. For example, if you're flattening a role hierarchy to implement row-level security on a dataset, you can preview the results to verify that they're as expected before proceeding.

### [Control Your Data Prep Concurrency Allocation](#)

Allocate your dataflow concurrency towards recipe jobs to meet your orchestration needs. For example, instead of being limited to running two dataflows and one recipe at a time, you can share dataflow concurrency towards recipes and run three recipes at the same time.

### [Audit Details of Running and Canceled Data Prep Jobs](#)

Enhanced data prep job information provides details for data prep jobs that are running off schedule or why they were canceled. Now you can see when each job started, who started it, and if a job was canceled, who canceled it and when. You can also view the last person who scheduled or unscheduled a recipe or connection in the job scheduler.

### [Get More Usage Information in Data Manager](#)

Manage your data limits with more statistics on the Data Manager Usage page. New usage information includes the number of external uploads and the total number of dataflow and recipe runs in a rolling 24-hour period. You can also see the monthly count of rows output by recipes.

### [Trigger Recipes to Run When an External Connection Syncs or a CSV Uploads](#)

Set your event-based recipe schedules to run when an external connection syncs or a CSV upload finishes. Instead of being limited to one event for your trigger, you can select multiple events. Create a recipe schedule to run after a local connection syncs and after an external connection syncs, keeping your recipe up to date regardless of the input source.

### [Experience Better Recipe Error Messaging and Reliability](#)

Your recipes are now more reliable and easier to troubleshoot. If an issue occurs, the error message helps you identify the problem and resolve issues faster. In addition, if a recipe requires more resources to run successfully, the resources are automatically increased after the first failure and the job is restarted. The need for increased resources is remembered for subsequent runs. Previously, you needed to open a support case to increase a recipe's resources.

### [Append Data Faster with Incremental Uploads \(Generally Available\)](#)

Improve your data upload time when using the external data API by loading CSV files incrementally. By registering data faster, you can bring in more data to your existing datasets without causing the overall run time to grow exponentially.

### [Connect to Amazon Athena \(Generally Available\)](#)

Sync Amazon Athena data to Data Manager by creating a remote connection.

### [Connect to Databricks \(Generally Available\)](#)

Create a remote connection using the Databricks connector to sync data from Databricks to Data Manager.

## Visualize Hierarchies and Flatten Transformations with Preview in the Recipe Editor

Preview the results of hierarchical data in aggregate nodes and flatten transformations to ensure that you have the correct output before running your recipe. For example, if you're flattening a role hierarchy to implement row-level security on a dataset, you can preview the results to verify that they're as expected before proceeding.

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

**How:** In the Data Prep recipe, select an aggregate node (1) in the graph to view the preview results (2).

The screenshot shows a data flow graph with the following nodes: Opportunities - Africa, Filter, Append, Append, Transform, Join, Aggregate, and Output. The Aggregate node is highlighted with a red box and a '1' in a red circle. Below the graph, the 'AGGREGATE' configuration panel is visible, showing a list of groups with 'Opportunities\_Africa Account Name' selected. A 'Preview' window is open, showing a table of results with a '2' in a red circle in the top right corner.

Account Name	Sum of Amount	Average Amount	Rows
Cummings974 Inc	1513850	756925	2
Tran866 Inc	1882242	627414	3
Adkins907 Inc	2051038	1025519	2
Munoz724 Inc	88200	88200	1

SEE ALSO:

[Salesforce Help: Preview Results in a Data Prep Recipe \(can be outdated or unavailable during release preview\)](#)

## Control Your Data Prep Concurrency Allocation

Allocate your dataflow concurrency towards recipe jobs to meet your orchestration needs. For example, instead of being limited to running two dataflows and one recipe at a time, you can share dataflow concurrency towards recipes and run three recipes at the same time.

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

**Who:** Concurrency allocation is available to users with a CRM Analytics Plus license and the CRMA Analytics Plus Admin permission set.

**How:** From Setup, in the Quick Find box, enter *Analytics*, and select **Settings**. Select **Enable concurrency limit sharing between dataflows and recipes** and save.

The capacity for individual concurrent dataflow or recipe runs in your org hasn't changed, but how you use that capacity is now flexible. You can concurrently run three recipes and no dataflows, two recipes and one dataflow, or one recipe and two dataflows.

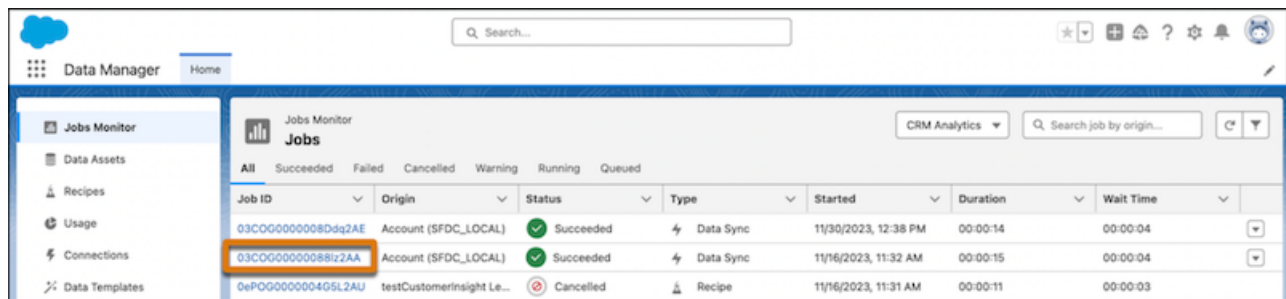
Enabling concurrency limit sharing can affect your scheduled dataflows and recipes if they or other jobs are already using available slots.

## Audit Details of Running and Canceled Data Prep Jobs

Enhanced data prep job information provides details for data prep jobs that are running off schedule or why they were canceled. Now you can see when each job started, who started it, and if a job was canceled, who canceled it and when. You can also view the last person who scheduled or unscheduled a recipe or connection in the job scheduler.

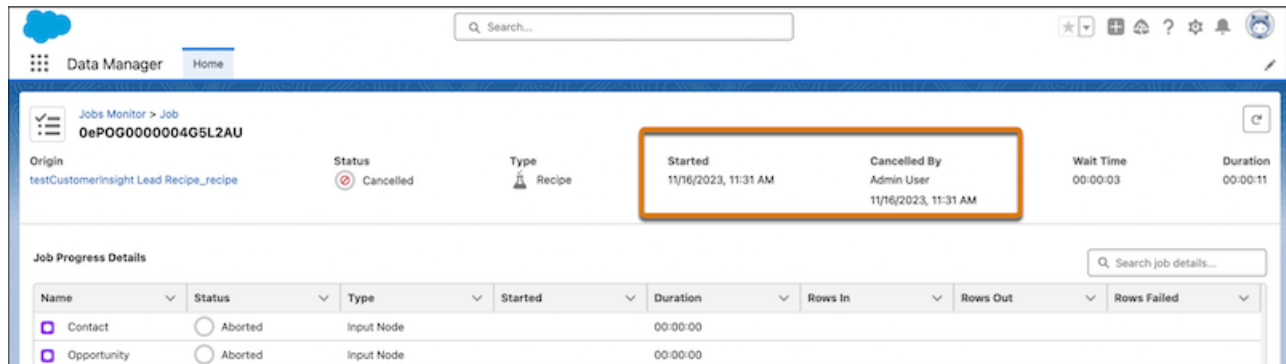
**Where:** This change applies to CRM Analytics in Lightning Experience and Salesforce Classic. CRM Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions. This change also applies to Salesforce Data Pipelines in Lightning Experience. Salesforce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

**How:** In Data Manager, on the Jobs Manager page, click the job ID to view the details.



Job ID	Origin	Status	Type	Started	Duration	Wait Time
03COG000008Ddq2AE	Account (SFDC_LOCAL)	Succeeded	Data Sync	11/30/2023, 12:38 PM	00:00:14	00:00:04
03COG0000088iz2AA	Account (SFDC_LOCAL)	Succeeded	Data Sync	11/16/2023, 11:32 AM	00:00:15	00:00:04
0ePOG000004G5L2AU	testCustomerInsight Le...	Cancelled	Recipe	11/16/2023, 11:31 AM	00:00:11	00:00:03

The Started information includes the user and start date and time. If the job was canceled, Cancelled information shows the user who canceled the job with the date and time.



Origin	Status	Type	Started	Cancelled By	Wait Time	Duration
testCustomerInsight Lead Recipe_recipe	Cancelled	Recipe	11/16/2023, 11:31 AM	Admin User 11/16/2023, 11:31 AM	00:00:03	00:00:11

Name	Status	Type	Started	Duration	Rows In	Rows Out	Rows Failed
Contact	Aborted	Input Node		00:00:00			
Opportunity	Aborted	Input Node		00:00:00			

SEE ALSO:

[Salesforce Help: Monitor a Recipe Job \(can be outdated or unavailable during release preview\)](#)

## Get More Usage Information in Data Manager

Manage your data limits with more statistics on the Data Manager Usage page. New usage information includes the number of external uploads and the total number of dataflow and recipe runs in a rolling 24-hour period. You can also see the monthly count of rows output by 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 change also applies to Salesforce Data Pipelines in Lightning Experience. Salesforce Data Pipelines is available for an extra cost in Enterprise, Performance, and Unlimited editions.

SEE ALSO:

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

## Trigger Recipes to Run When an External Connection Syncs or a CSV Uploads

Set your event-based recipe schedules to run when an external connection syncs or a CSV upload finishes. Instead of being limited to one event for your trigger, you can select multiple events. Create a recipe schedule to run after a local connection syncs and after an external connection syncs, keeping your recipe up to date regardless of the input source.

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

**How:** On the Recipes page in Data Manager, select **Schedule** from the recipes options menu. Under Schedule Mode, select **Event-based**. Select one or more options in the Run Schedule After list.

**Schedule for "Learning Adventure Learn - Join"**

Schedule mode

Time-based  Event-based

**Run Schedule After**

- The Salesforce local connection syncs.
- The Salesforce external connection syncs.
- The selected CSVs are updated or dataflows/recipes run.

SEE ALSO:

[Salesforce Help: Schedule a Recipe to Run Automatically \(can be outdated or unavailable during release preview\)](#)

## Experience Better Recipe Error Messaging and Reliability

Your recipes are now more reliable and easier to troubleshoot. If an issue occurs, the error message helps you identify the problem and resolve issues faster. In addition, if a recipe requires more resources to run successfully, the resources are automatically increased after the first failure and the job is restarted. The need for increased resources is remembered for subsequent runs. Previously, you needed to open a support case to increase a recipe's resources.

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

## Append Data Faster with Incremental Uploads (Generally Available)

Improve your data upload time when using the external data API by loading CSV files incrementally. By registering data faster, you can bring in more data to your existing datasets without causing the overall run time to grow exponentially.



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

**How:** When using the Analytics External Data API to load data, set the mode to incremental.

SEE ALSO:

[Analytics External Data API Developer Guide: Append the Data \(can be outdated or unavailable during release preview\)](#)

## Connect to Amazon Athena (Generally Available)

Sync Amazon Athena data to Data Manager by creating a remote connection.

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

**How:** Use Data Manager to create an Amazon Athena connection. Add your AWS security credentials to the advanced properties for each connected object.

SEE ALSO:

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

## Connect to Databricks (Generally Available)

Create a remote connection using the Databricks connector to sync data from Databricks to Data Manager.

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

**How:** Use Data Manager to create a Databricks connection. Add the Databricks personal access token, server, HTTPPath, and database values to the advanced properties for each connected object.

SEE ALSO:

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

## Intelligent Analytics Apps

Optimize your sales strategy and track changes in your pipeline with Revenue Intelligence. Improve performance, monitor operations, and quickly discover top customer requests with Service Intelligence.

- [Revenue Intelligence Release Notes](#)
- [Service Intelligence Release Notes](#)

## 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.

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

### [Embed Tableau Pulse Data in Lightning Pages](#)

Integrate AI-powered insights from Tableau Pulse with Lightning pages to speed up data-driven decisions. To let users review Tableau metrics and visualizations without leaving their flow of work, you can now add the Tableau Pulse Lightning web component to a Lightning App, Home, or Record page.

### [Tableau Release Notes](#)

Tableau has enterprise analytics platform solutions for deep data exploration.

## Embed Tableau Pulse Data in Lightning Pages

Integrate AI-powered insights from Tableau Pulse with Lightning pages to speed up data-driven decisions. To let users review Tableau metrics and visualizations without leaving their flow of work, you can now add the Tableau Pulse Lightning web component to a Lightning App, Home, or Record page.

**Where:** This change applies to Tableau Cloud in Lightning Experience and Salesforce Classic.

**How:** To enable the Tableau Pulse component, from Setup, in the Quick Find box, enter *Tableau Embedding*, and then select it. Enable Tableau Lightning Web Components and token-based single sign-on authentication. Optionally, set up host mapping for the Tableau site.

To add the Tableau Pulse component, open Lightning App Builder for the page that you want to edit. From the component palette, drag the Tableau Pulse component onto the page.

**Note:** By default, the share setting for Tableau host mapping is Public Read Only for internal and external access, which can impact your org's Health Check score. For more information, see [How Is the Health Check Score Calculated?](#)

SEE ALSO:

[Tableau Help: Configure a Tableau Pulse Lightning Web Component](#)

[Tableau Help: Configuring Tableau Lightning Web Components and Seamless Authentication](#)

[Tableau Help: About Tableau Pulse](#)

## Tableau Release Notes

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

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 Help Map](#)

## Commerce

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

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

Guests can now log in without emptying their carts. Einstein generative AI revolutionizes your store with Goals and Recommendations, the Commerce Concierge chatbot, Smart Promotions, and meta tags to boost your page's SEO. Split orders to ship to multiple locations, or fulfill them to ship from multiple locations. Promote large purchases and use store setup tasks to sell fast. Offer subscriptions, and improve store performance with goals and recommendations.

### [Omnichannel Inventory](#)

View if shipping has been disabled for a product in the Omnichannel Inventory console.

### [Salesforce Order Management](#)

Use the new exchange API to create a single flow for product returns and exchanges. Exchanges cuts out the middle step by letting customer service representatives apply an exchange balance directly to a new product. Use Order on Behalf Of to reach more customers with new guest checkout. Use the simplified Order Creation API independently of the High Scale Order API by enabling High Scale for B2CE Integration.

### [Salesforce Payments](#)

Improve your Pay Now page by using the new Checkout with Order payment link. Let Pay Now customers register and log in using one-click checkout. Accept popular digital wallets by enabling express payment methods, and give customers more ways to manage their saved payment methods.

## Salesforce B2B and D2C Commerce

Guests can now log in without emptying their carts. Einstein generative AI revolutionizes your store with Goals and Recommendations, the Commerce Concierge chatbot, Smart Promotions, and meta tags to boost your page's SEO. Split orders to ship to multiple locations, or fulfill them to ship from multiple locations. Promote large purchases and use store setup tasks to sell fast. Offer subscriptions, and improve store performance with goals and recommendations.

### [Commerce Einstein](#)

Let Einstein revolutionize your Commerce store with Goals and Recommendations, the Commerce Concierge bot, Smart Promotions, and meta tags to boost your page's SEO.

### [Commerce Easy Set Up](#)

Create a store faster using setup tasks displayed and organized for you on the store home page. Allow guests to access your store with just a few clicks. Save time by configuring locale settings as you create a store, and change the CMS public channel assigned to the store at any time. Try out the new Salesforce tax pilot.

### [Commerce Cart, Checkout, and Promotions](#)

Your customers can now log in without losing their cart. Split orders to ship to multiple locations or fulfill an order from multiple locations. Promote larger purchases and set up coupon redemption limits.

### [Commerce Search and SEO](#)

Improve your search results with product image structured data. Search stores with automatic SKU detection (pilot).

### [Commerce Reorder Portal](#)

You can now customize emails in a reorder invitation cadence. Customers can now see purchased products and you can quickly send email invitations on the Commerce Reorder Portal.

### [Commerce Components](#)

You can now create different versions of a component to target specific customer groups. Add express checkout on your cart and checkout pages. Display the No Results Layout component on the search results page when a query yields no results.

### [Additional Commerce Features](#)

You can now welcome business accounts to D2C Commerce. Offer and manage subscriptions in your stores. Set up self-registration for B2B stores.

## Commerce Einstein

Let Einstein revolutionize your Commerce store with Goals and Recommendations, the Commerce Concierge bot, Smart Promotions, and meta tags to boost your page's SEO.

### [Improve Store Performance with Goals and Recommendations](#)

Use goals and recommendations to achieve key performance goals for your store, such as improving site conversion, increasing site traffic, and increasing average order value. With a guided framework that offers specific AI-powered recommendations, you can take smart and efficient actions to set up and grow your store faster. You can also monitor progress over time with insights powered by Data Cloud.

### [Optimize Your Customers' Shopping Experience with the Commerce Concierge Bot](#)

Offer your buyers and shoppers conversational product recommendation and reordering capabilities. Create an enhanced bot from the new Commerce Concierge template to connect your store to a new Einstein bot. Or use the new Commerce Concierge bot blocks to add functionality to an existing enhanced bot. Your customers can authenticate in the store, access multiple accounts, reorder, and leverage Einstein generative AI features, such as product recommendation and product recommendation feedback.

### [Create Smart Promotions with Einstein](#)

Harness the power of Einstein and trusted data from Commerce Cloud to draft promotions with just a few clicks. Quickly create basic and advanced promotions using natural language instructions and generative AI.

### [Create SEO Metadata for Products from Goals and Recommendations](#)

Boost SEO directly from a tile on the Goals and Recommendations page by using Einstein generative AI to create product page title tags. Configure recommended tasks for your store quickly and easily and improve your user experience.

### [Boost SEO with Einstein for Page Meta Tags](#)

Use Einstein generative AI to create Page Title Tag and Page Meta Description fields on products. These fields feed search engines information about your page and improve SEO performance. You can also create and manage page meta tags manually from the SEO tab on a Product record.

### [Decrease Return Rates with Einstein Return Insights](#)

Improve your product listings and decrease return rates by analyzing return reasons. Select up to 20 high return-rate products at a time. Einstein analyzes and displays the return reasons, sorted and categorized.

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

Now your customers can find products more easily with Einstein semantic search. Einstein semantic search uses natural language processing to interpret queries and return relevant results that account for synonyms, alternative spellings, typos, and more. For example, Einstein semantic search matches terms like “couch” and “sofa,” or “jumper” and “sweater,” and returns results that meet the searcher’s intent.

#### SEE ALSO:

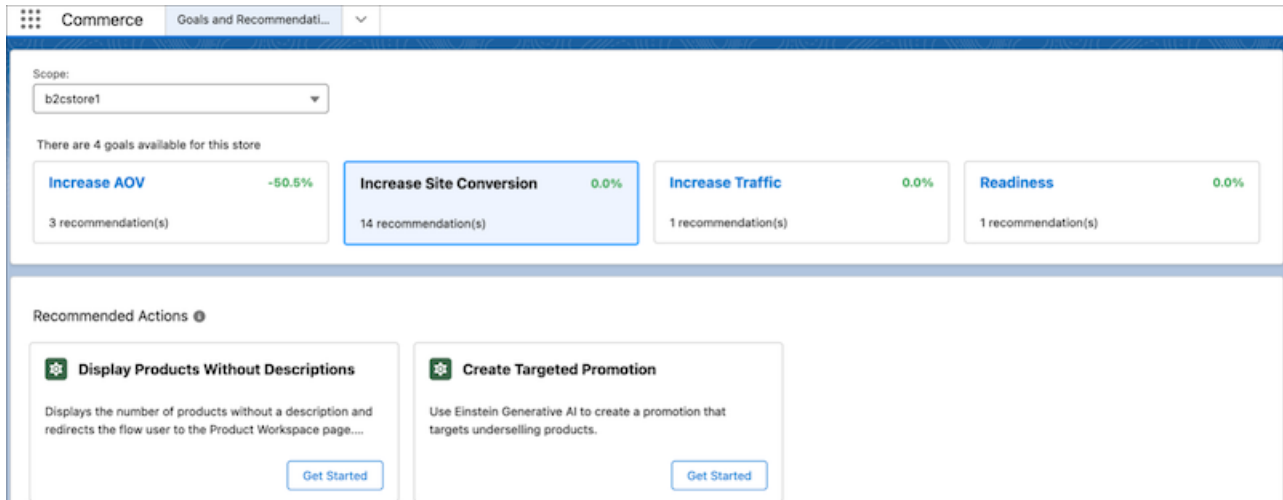
[Einstein Features](#)

## Improve Store Performance with Goals and Recommendations

Use goals and recommendations to achieve key performance goals for your store, such as improving site conversion, increasing site traffic, and increasing average order value. With a guided framework that offers specific AI-powered recommendations, you can take smart and efficient actions to set up and grow your store faster. You can also monitor progress over time with insights powered by Data Cloud.

**Where:** This change applies to B2B Commerce and D2C Commerce in Enterprise, Unlimited, and Developer editions.

**How:** To view the goals and recommendations for your store, from the Commerce App Navigation menu, select **Goals and Recommendations**.



SEE ALSO:

[Salesforce Help: Goals and Recommendations \(can be outdated or unavailable during release preview\)](#)

## Optimize Your Customers' Shopping Experience with the Commerce Concierge Bot

Offer your buyers and shoppers conversational product recommendation and reordering capabilities. Create an enhanced bot from the new Commerce Concierge template to connect your store to a new Einstein bot. Or use the new Commerce Concierge bot blocks to add functionality to an existing enhanced bot. Your customers can authenticate in the store, access multiple accounts, reorder, and leverage Einstein generative AI features, such as product recommendation and product recommendation feedback.

**Where:** This change applies to Lightning Experience in Unlimited editions with Commerce Cloud Einstein and the Einstein Bots and Digital Engagement add-on. Einstein generative AI is available in Lightning Experience.

To purchase the Einstein Bots and Digital Engagement add-on, contact your Salesforce account executive.

**How:** From the Einstein Bots page in Setup, you can create a bot from the Commerce Concierge template. To add blocks to an existing bot, from the Dialogs page of the Bot Builder, import a block into your bot.

SEE ALSO:

[Salesforce Help: Einstein Generative AI Features \(can be outdated or unavailable during release preview\)](#)

## Create Smart Promotions with Einstein

Harness the power of Einstein and trusted data from Commerce Cloud to draft promotions with just a few clicks. Quickly create basic and advanced promotions using natural language instructions and generative AI.

**Where:** This change applies to B2B Commerce and D2C Commerce in Enterprise, Unlimited, and Developer editions. Einstein generative AI is available in Lightning Experience.

**Who:** The EinsteinGPTCommerceAddOn license is required to use Smart Promotions. The EinsteinGPTPlatformAddOn license is required to use Einstein features.

**How:** In the Promotion workspace, click **Draft with Einstein**. In the Einstein GPT panel, select a store, and select an example instruction or use natural language to describe the promotion that you want to create. Click **Draft Promotion**, and review the results before activating the promotion.

SEE ALSO:

[Salesforce Help: Create Promotions with Einstein](#) (can be outdated or unavailable during release preview)

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

## Create SEO Metadata for Products from Goals and Recommendations

Boost SEO directly from a tile on the Goals and Recommendations page by using Einstein generative AI to create product page title tags. Configure recommended tasks for your store quickly and easily and improve your user experience.

**Where:** This change applies to B2B Commerce and D2C Commerce in Enterprise, Unlimited, and Developer editions. Einstein generative AI is available in Lightning Experience.

**How:** On your store's home page, select **Goals & Recommendations > Increase Traffic**. On the Create SEO Metadata for Products tile, click **Get Started**.

SEE ALSO:

[Salesforce Help: Goals and Recommendations](#) (can be outdated or unavailable during release preview)

[Salesforce Help: Page Meta Tags for Commerce](#) (can be outdated or unavailable during release preview)

## Boost SEO with Einstein for Page Meta Tags

Use Einstein generative AI to create Page Title Tag and Page Meta Description fields on products. These fields feed search engines information about your page and improve SEO performance. You can also create and manage page meta tags manually from the SEO tab on a Product record.

**Where:** This change applies to B2B Commerce and D2C Commerce in Enterprise, Unlimited, and Developer editions. Einstein generative AI is available in Lightning Experience.

**How:** In the product workspace, select one or more products and click **Create and Review Field Text**.

SEE ALSO:

[Salesforce Help: Configure Page Meta Tags \(can be outdated or unavailable during release preview\)](#)

## Decrease Return Rates with Einstein Return Insights

Improve your product listings and decrease return rates by analyzing return reasons. Select up to 20 high return-rate products at a time. Einstein analyzes and displays the return reasons, sorted and categorized.

**Where:** This change applies to all Unlimited Edition and Professional Edition orgs with the Salesforce Order Management Growth License. Einstein is available in Lightning Experience.

SEE ALSO:

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

## Bring Products to Customers with AI-Powered Search (Generally Available)

Now your customers can find products more easily with Einstein semantic search. Einstein semantic search uses natural language processing to interpret queries and return relevant results that account for synonyms, alternative spellings, typos, and more. For example, Einstein semantic search matches terms like "couch" and "sofa," or "jumper" and "sweater," and returns results that meet the searcher's intent.

**Where:** This change applies to B2B Commerce and D2C Commerce in Enterprise, Unlimited, and Developer editions.

**How:** To activate Einstein semantic search, first enable Commerce Einstein and storefront activity tracking.

SEE ALSO:

[Salesforce Help: AI-Powered Search \(can be outdated or unavailable during release preview\)](#)

## Commerce Easy Set Up

Create a store faster using setup tasks displayed and organized for you on the store home page. Allow guests to access your store with just a few clicks. Save time by configuring locale settings as you create a store, and change the CMS public channel assigned to the store at any time. Try out the new Salesforce tax pilot.

[Use Store Setup Tasks to Start Selling Fast](#)

Setup tasks listed on the screen walk you through setting up your selling channel. As you complete the tasks, you can check them off to track your progress. The Add products link goes to a new consolidated page where you can select the method you want to use to add products.



### [Easily Set Up Guest Access](#)

Guest access lets unauthenticated shoppers or buyers browse your store and make purchases. Your products are also discoverable online to anyone. Salesforce has streamlined the steps to enable guest access so that you can complete the process in one click. We automatically create a guest user profile, configure settings in Experience Builder, and add default checkout settings. For B2C stores, enabling guest access is required for shoppers to access the store. For B2B stores, guest access is optional and allows unauthenticated buyers to access the store. Person Accounts must be enabled before you can enable guest access.

### [Specify Locale Settings During Store Creation](#)

When creating your store, you can now select the default language, currency, and ship-to country during the store creation process. Previously, you provided those settings after the store was created.

### [Assign a CMS Public Channel to a Store](#)

When you create a store on an enhanced LWR site, Salesforce creates an enhanced CMS workspace and an enhanced public channel to that workspace. You can now change the public channel assigned to the store.

### [Collect Tax Globally with Salesforce Tax \(Pilot\)](#)

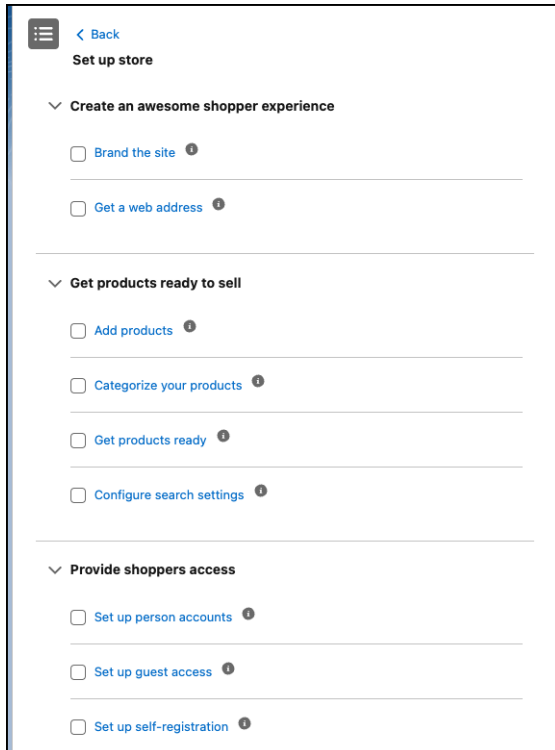
Your storefront is going places—and your tax configuration is ready to follow. Calculate, collect, and report tax on global payments without maintaining static tax tables. Launch your storefront with robust taxation implementation and less configuration so that orders roll in faster.

## Use Store Setup Tasks to Start Selling Fast

Setup tasks listed on the screen walk you through setting up your selling channel. As you complete the tasks, you can check them off to track your progress. The Add products link goes to a new consolidated page where you can select the method you want to use to add products.

**Where:** This change applies to B2B Commerce and D2C Commerce in Enterprise, Unlimited, and Developer editions.

**How:** On the right side of your store's home page, click **Set up store**.



SEE ALSO:

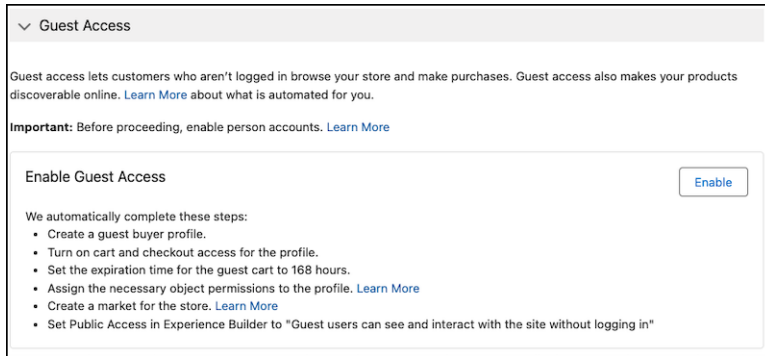
[Salesforce Help: Create a Store or Reorder Portal \(can be outdated or unavailable during release preview\)](#)

## Easily Set Up Guest Access

Guest access lets unauthenticated shoppers or buyers browse your store and make purchases. Your products are also discoverable online to anyone. Salesforce has streamlined the steps to enable guest access so that you can complete the process in one click. We automatically create a guest user profile, configure settings in Experience Builder, and add default checkout settings. For B2C stores, enabling guest access is required for shoppers to access the store. For B2B stores, guest access is optional and allows unauthenticated buyers to access the store. Person Accounts must be enabled before you can enable guest access.

**Where:** This change applies to B2B Commerce and D2C Commerce in Enterprise, Unlimited, and Developer editions.

**How:** On your store's home page, select **Administration > Buyer Access**. Under Guest Access, click **Enable**.

**SEE ALSO:**

[Salesforce Help: Enable Guest Access to a Store \(can be outdated or unavailable during release preview\)](#)

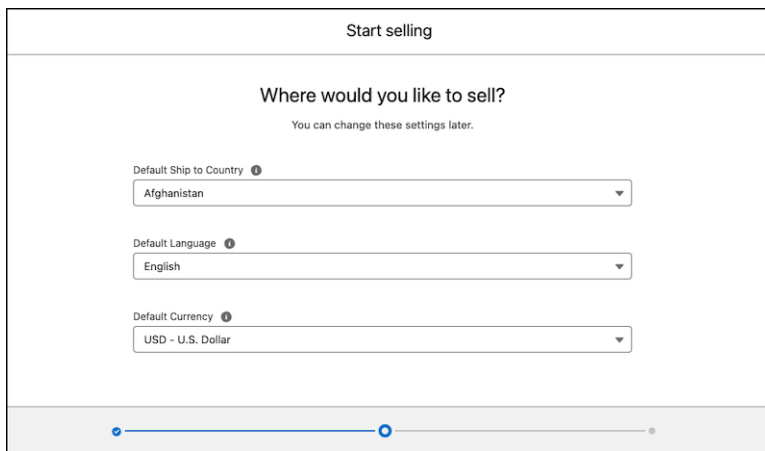
[Salesforce Help: Enable Person Accounts for Commerce \(can be outdated or unavailable during release preview\)](#)

## Specify Locale Settings During Store Creation

When creating your store, you can now select the default language, currency, and ship-to country during the store creation process. Previously, you provided those settings after the store was created.

**Where:** This change applies to B2B Commerce and D2C Commerce in Enterprise, Unlimited, and Developer editions.

**How:** From the Commerce app navigation menu, select **Stores**, and then click **Create a Store**.

**SEE ALSO:**

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

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

[Salesforce Help: Segment a Store into Markets Based on Locale \(can be outdated or unavailable during release preview\)](#)

## Assign a CMS Public Channel to a Store

When you create a store on an enhanced LWR site, Salesforce creates an enhanced CMS workspace and an enhanced public channel to that workspace. You can now change the public channel assigned to the store.

**Where:** This change applies to B2B Commerce and D2C Commerce in Enterprise, Unlimited, and Developer editions.

**How:** The option to select a CMS public channel appears on the screen only for stores built on enhanced LWR sites. From your store's administration page, select **Administration > General**. Select an enhanced CMS public channel for the store.


SEE ALSO:

[Salesforce Help: Assign a CMS Channel to a Commerce Store \(can be outdated or unavailable during release preview\)](#)

## Collect Tax Globally with Salesforce Tax (Pilot)

Your storefront is going places—and your tax configuration is ready to follow. Calculate, collect, and report tax on global payments without maintaining static tax tables. Launch your storefront with robust taxation implementation and less configuration so that orders roll in faster.

**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.

**Who:** To participate in the pilot program, contact your account executive.

**How:** If Salesforce enables the pilot permission and you've configured a merchant account for a web store, the tax service uses Salesforce Tax for calculating taxes.

SEE ALSO:

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

## Commerce Cart, Checkout, and Promotions

Your customers can now log in without losing their cart. Split orders to ship to multiple locations or fulfill an order from multiple locations. Promote larger purchases and set up coupon redemption limits.

### [Let Guests Log In Without Emptying Their Carts](#)

Now when someone shops as a guest before logging in to your store, they don't have to start over with an empty cart after authenticating. Enable Preserve Guest Carts so customers can pick up exactly where they left off. In new stores, Preserve Guest Carts is enabled by default.

### [Split an Order to Ship to Multiple Locations](#)

Let your customers ship items in one order to multiple locations by enabling Split Shipping. At checkout, customers can split a single cart into multiple shipments using delivery groups. Customers can specify a shipping method and destination for up to 10 delivery groups per order. To increase the delivery group limit for your Salesforce org, contact your Salesforce Administrator. Split Shipping doesn't support subscriptions.

### [Fulfill an Order from Multiple Locations](#)

Ship one order from multiple fulfillment locations using Split Order Fulfillment. When combined with the new Split Shipping feature, you can set up your store to create fulfillment orders for each delivery group. To get started, install and activate the Split Order Fulfillment flows.

### [Promote Larger Purchases](#)

Tantalize your customers with promotions aimed at encouraging larger purchases. You can now add promotions to carts with 10,000 or more quantities of items.

### Set Coupon Redemption Limits

Control how many times customers can redeem your coupons. Set the maximum number for each customer and the maximum uses across all customers. When the coupon meets your specified limit, it's no longer valid.

### Customize Promotions with Conditional Rules

Use promotional rules to create complex discounts on your products. Specify conditions to increase sales without undercutting your profit margin. Include or exclude specific products, categories, and product prices.

### Cart Calculate API Enabled for New Webstores

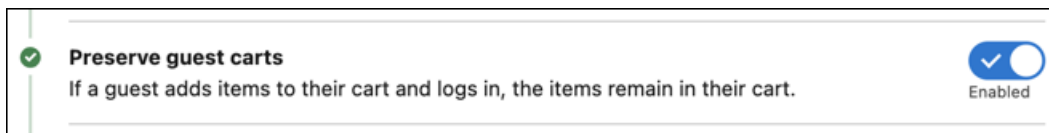
Use the Cart Calculate API to customize cart calculations, including calculations that occur during checkout. The API is enabled by default for all new stores. The Cart Calculate API, which is built on the Salesforce Commerce Extensions framework, is the recommended way to customize cart and checkout behavior for stores based on LWR templates. The Cart Calculate API, however, isn't compatible with stores based on Aura templates. Disable the Cart Calculate API for stores based on Aura templates.

## Let Guests Log In Without Emptying Their Carts

Now when someone shops as a guest before logging in to your store, they don't have to start over with an empty cart after authenticating. Enable Preserve Guest Carts so customers can pick up exactly where they left off. In new stores, Preserve Guest Carts is enabled by default.

**Where:** This change applies to B2B Commerce and D2C Commerce in Enterprise, Unlimited, and Developer editions.

**How:** On your store Administration page, go to the **Buyer Access** tab. In the Guest Access section, enable **Preserve guest carts**.



SEE ALSO:

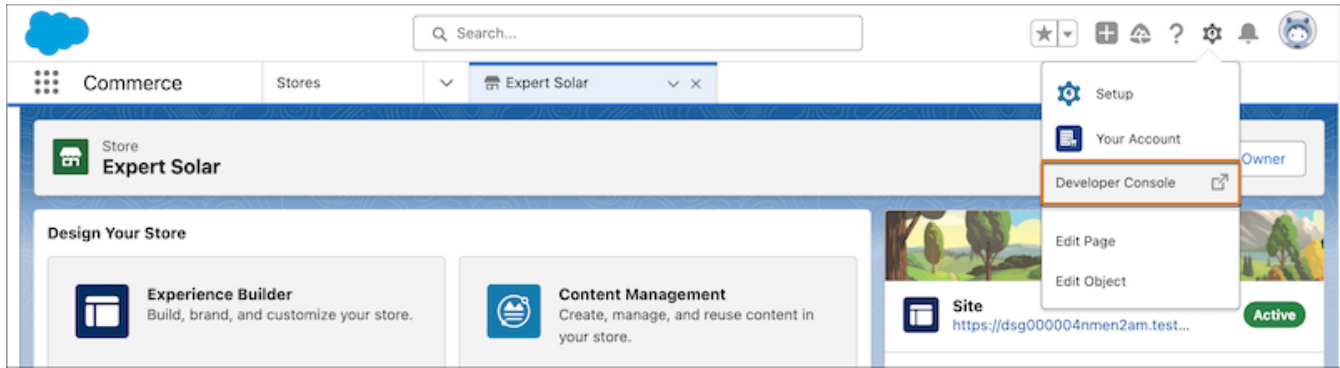
[Salesforce Help: Enable Guest Access to a Store \(can be outdated or unavailable during release preview\)](#)

## Split an Order to Ship to Multiple Locations

Let your customers ship items in one order to multiple locations by enabling Split Shipping. At checkout, customers can split a single cart into multiple shipments using delivery groups. Customers can specify a shipping method and destination for up to 10 delivery groups per order. To increase the delivery group limit for your Salesforce org, contact your Salesforce Administrator. Split Shipping doesn't support subscriptions.

**Where:** This change applies to B2B and D2C Commerce in Enterprise, Unlimited, and Developer editions.

**How:** From your store settings, enable Split Shipping in the Developer Console. To display the Ship to Multiple Locations button, use either the One-Page layout or Accordion layout component on your Checkout page. On the Split Shipment page, add the Split Shipping Header and Split Shipping Cart Item components.



SEE ALSO:

[Salesforce Help: Enable Split Shipping for a Commerce Store \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Customize Shipping in Checkout \(can be outdated or unavailable during release preview\)](#)

## Fulfill an Order from Multiple Locations

Ship one order from multiple fulfillment locations using Split Order Fulfillment. When combined with the new Split Shipping feature, you can set up your store to create fulfillment orders for each delivery group. To get started, install and activate the Split Order Fulfillment flows.

**Where:** This change applies to B2B Commerce and D2C Commerce in Enterprise, Unlimited, and Developer editions.

SEE ALSO:

[Salesforce Help: Configure Split Order Fulfillment \(can be outdated or unavailable during release preview\)](#)

[Split an Order to Ship to Multiple Locations](#)

## Promote Larger Purchases

Tantalize your customers with promotions aimed at encouraging larger purchases. You can now add promotions to carts with 10,000 or more quantities of items.

**Where:** This change applies to B2B Commerce and D2C Commerce in Enterprise, Unlimited, and Developer editions.

**How:** To add support for large cart promotions, contact your Salesforce Administrator. Enabling this feature impacts how some promotions operate.

SEE ALSO:

[Salesforce Help: Considerations for Large Carts \(can be outdated or unavailable during release preview\)](#)

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

## Set Coupon Redemption Limits

Control how many times customers can redeem your coupons. Set the maximum number for each customer and the maximum uses across all customers. When the coupon meets your specified limit, it's no longer valid.

**Where:** This change applies to B2B Commerce and D2C Commerce in Enterprise, Unlimited, and Developer editions.

**How:** In the Promotion Workspace, create a coupon on the Coupons tab. For Redemption Limit All Buyers and Redemption Limit per Buyer, enter the maximum number of uses for this coupon.

**New Coupon**

\* = Required Information

**Information**

\* Coupon Code ↵  
20OFF

Description ↵  
Buyers get 20% off through Black Friday

\* Status ↵  
Active

Redemption Limit All Buyers ⓘ ↵  
100

Redemption Limit Per Buyer ⓘ ↵  
3

\* Promotion ↵  
Coupon Promotion X

**Scheduling**

Start DateTime ↵

Date	Time
11/15/2023	12:00 PM

End DateTime ↵

Date	Time
11/25/2023	12:00 AM

Cancel Save & New Save

SEE ALSO:

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

## Customize Promotions with Conditional Rules

Use promotional rules to create complex discounts on your products. Specify conditions to increase sales without undercutting your profit margin. Include or exclude specific products, categories, and product prices.

**Where:** This change applies to B2B Commerce and D2C Commerce in Enterprise, Unlimited, and Developer editions.

**How:** Open or create a promotion in your store. In Promotion Rules, click **Edit**. Edit the condition details and click **Save**.

**Edit rules**

**Conditions**

Apply Adjustments When  
Any Condition Is Met

Target Type Operator Type \* Product  
Product is Alpine Energy Drink Chai During 0.5L PET - X

OR Target Type Operator Type \* Category  
Category is Not Coffee X

OR Target Type Operator Type \* Price  
Price Greater Than 20.00 X

+ Add Condition

Cancel Save

SEE ALSO:

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

## Cart Calculate API Enabled for New Webstores

Use the Cart Calculate API to customize cart calculations, including calculations that occur during checkout. The API is enabled by default for all new stores. The Cart Calculate API, which is built on the Salesforce Commerce Extensions framework, is the recommended way to customize cart and checkout behavior for stores based on LWR templates. The Cart Calculate API, however, isn't compatible with stores based on Aura templates. Disable the Cart Calculate API for stores based on Aura templates.

**Where:** This change applies to B2B Commerce and D2C Commerce in Enterprise, Unlimited, and Developer editions.

SEE ALSO:

[Enable and Disable the Cart Calculate API for a Webstore](#)

## Commerce Search and SEO

Improve your search results with product image structured data. Search stores with automatic SKU detection (pilot).

[Search Stores with Automatic SKU Detection \(Pilot\)](#)

Now your customers can find the products that they want faster and more precisely with automatically detected searches by stock-keeping unit (SKU). When a customer enters a search, Commerce Search uses Einstein to determine whether the phrase represents a SKU. If it represents a SKU, Commerce Search only searches for the Product SKU and Product Code fields to ensure that the results include exact SKU matches. A customer can enter a single SKU or multiple SKUs separated by a space. Previously, customers manually initiated a SKU-only search by entering sku: or SKU: before their search query. This behavior is still supported.

[Improve Search Results with Product Image Structured Data](#)


Use expressions for product images to dynamically update a page's meta tags and improve SEO. With structured data, search engines can construct richer, more engaging results.



## Search Stores with Automatic SKU Detection (Pilot)

Now your customers can find the products that they want faster and more precisely with automatically detected searches by stock-keeping unit (SKU). When a customer enters a search, Commerce Search uses Einstein to determine whether the phrase represents a SKU. If it represents a SKU, Commerce Search only searches for the Product SKU and Product Code fields to ensure that the results include exact SKU matches. A customer can enter a single SKU or multiple SKUs separated by a space. Previously, customers manually initiated a SKU-only search by entering sku: or SKU: before their search query. This behavior is still supported.

**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.

**Who:** To participate in the pilot program, contact your account executive.

**How:** From the Search tile, click **SKU Detection Settings**, and then turn on **SKU Detection (Beta)**. To apply changes to your store, rebuild the search index.

SEE ALSO:

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

## Improve Search Results with Product Image Structured Data

Use expressions for product images to dynamically update a page's meta tags and improve SEO. With structured data, search engines can construct richer, more engaging results.

**Where:** This change applies to B2B Commerce and D2C Commerce in Enterprise, Unlimited, and Developer editions.

**How:** From Experience Builder, edit the head tags on a Product Detail page. Add an expression that maps to product data, for example, "image": "{!Record.ProductMedia.DefaultImage}".

SEE ALSO:

[Salesforce Help: Structured Data for Meta Tags \(can be outdated or unavailable during release preview\)](#)

## Commerce Reorder Portal

You can now customize emails in a reorder invitation cadence. Customers can now see purchased products and you can quickly send email invitations on the Commerce Reorder Portal.

### [Customize Emails in a Reorder Portal Invitation Cadence](#)

Easily customize reorder portal invitation emails in the Invite Contact to Reorder Portal cadence. And get started by using Einstein to generate a draft. Update the Invite Contact to Reorder Portal cadence to use the new email composition screen.

### [Display Purchased Products on the Reorder Portal Home Page](#)

Make it easy for customers to view previously purchased products and add them to their cart by showing them on the home page. Update your Commerce Reorder Portal template to use the new Purchased Products component.

### [Invite Contacts to a Reorder Portal with a Quick Cadence](#)

You can now use a quick cadence to send email invitations for a Commerce reorder portal. Previously, you could only use a standard cadence, which requires multiple steps and a manager to create it. A quick cadence has only one step and can be created by any Sales Engagement user.

## Customize Emails in a Reorder Portal Invitation Cadence

Easily customize reorder portal invitation emails in the Invite Contact to Reorder Portal cadence. And get started by using Einstein to generate a draft. Update the Invite Contact to Reorder Portal cadence to use the new email composition screen.

**Where:** This change applies to Reorder Portal in Enterprise, Unlimited, and Developer editions.

**How:** From the Sales Engagement app, open a contact record. Add the contact to the Invite Contact to Reorder Portal cadence, and run the cadence.

SEE ALSO:

[Salesforce Help: Use Cadences for a Commerce Reorder Portal \(can be outdated or unavailable during release preview\)](#)

## Display Purchased Products on the Reorder Portal Home Page

Make it easy for customers to view previously purchased products and add them to their cart by showing them on the home page. Update your Commerce Reorder Portal template to use the new Purchased Products component.

**Where:** This change applies to Reorder Portal in Enterprise, Unlimited, and Developer editions.

SEE ALSO:

[Salesforce Help: Sell with a Commerce Reorder Portal \(can be outdated or unavailable during release preview\)](#)

## Invite Contacts to a Reorder Portal with a Quick Cadence

You can now use a quick cadence to send email invitations for a Commerce reorder portal. Previously, you could only use a standard cadence, which requires multiple steps and a manager to create it. A quick cadence has only one step and can be created by any Sales Engagement user.

**Where:** This change applies to Reorder Portal in Enterprise, Unlimited, and Developer editions.

**How:** From Sales Engagement, go to the detail page of the contact that you want to invite. From the Actions menu, select **Add to Cadence**, and then select **Quick Cadence: Invite Contact to Reorder Portal**.

The screenshot shows a modal window titled "Add to Cadence". On the left, there is a search bar with the text "Quick Cadence: Invite Contact to Reorder Portal" and a close button. Below the search bar, a message states "This target is currently assigned to 2 cadences" with a "View" link. Underneath, there is a section "Assign target to:" with three radio button options: "Record owner", "Me" (which is selected), and "Another Sales Engagement user". On the right side of the modal, there are four sections: "Cadence Name" with a plus icon and the text "Quick Cadence: Invite Contact to Reorder Portal"; "Cadence Creator" with a plus icon and the text "Automated Process"; "Last Modified" with the text "Automated Process, 11/12/2023, 10:00 PM"; and "Description" with the text "A quick cadence to invite contacts to a Commerce reorder portal for self-service reorders." At the bottom right, there are two buttons: "Cancel" and "Add".

SEE ALSO:

[Salesforce Help: Use Cadences for a Commerce Reorder Portal \(can be outdated or unavailable during release preview\)](#)

## Commerce Components

You can now create different versions of a component to target specific customer groups. Add express checkout on your cart and checkout pages. Display the No Results Layout component on the search results page when a query yields no results.

### [Create Multiple Variations of a Component to Target Customers](#)

Create different versions of a component to target specific customer groups. Change the style and visibility settings to make each version unique. Create a single variation for a targeted shopper segment or buyer group, or have several variations that apply broadly to subsets of your shoppers.

### [Add Express Checkout to Your Cart and Checkout Pages](#)

Streamline checkout and increase customer conversion rates by accepting digital wallet payments with Express Checkout. Now your customers can complete orders using their digital wallet without entering shipping or payment details. Express Checkout supports multiple digital wallet payment options, including Apple Pay, Google Pay, PayPal, and Venmo. Express Checkout doesn't support subscriptions and is available only when shipping to one address.

### [Let Customers Know When There Are No Search Results](#)

If your B2B or B2C store uses the LWR template, add the No Results Layout component to display a message on the search results page when a query yields no results. Modify the default message as needed. You can also show a message while results are loading with the Loading State component.

## Create Multiple Variations of a Component to Target Customers

Create different versions of a component to target specific customer groups. Change the style and visibility settings to make each version unique. Create a single variation for a targeted shopper segment or buyer group, or have several variations that apply broadly to subsets of your shoppers.

**Where:** This change applies to B2B Commerce and D2C Commerce in Enterprise, Unlimited, and Developer editions.

**How:** From Experience Builder, select a component on the canvas, and click the Component Variations icon. Add a name and click **Save**. Select your variation and update the options on the Settings and Style tabs to differentiate your variation from the default component.

SEE ALSO:

[Salesforce Help: Component Variations in Enhanced LWR Sites \(can be outdated or unavailable during release preview\)](#)

## Add Express Checkout to Your Cart and Checkout Pages

Streamline checkout and increase customer conversion rates by accepting digital wallet payments with Express Checkout. Now your customers can complete orders using their digital wallet without entering shipping or payment details. Express Checkout supports multiple digital wallet payment options, including Apple Pay, Google Pay, PayPal, and Venmo. Express Checkout doesn't support subscriptions and is available only when shipping to one address.

**Where:** This change applies to B2B and D2C Commerce LWR sites in Enterprise, Unlimited, and Developer editions. Express Checkout requires Salesforce Payments.

**How:** To enable Express Checkout payment options, create a digital wallet payment method set during the merchant guided setup, or from the **Related** tab of the merchant account detail page. In Experience Builder, add the Express Checkout component (1) to your store's Cart and Checkout pages, and enter the payment method set key (2) in the component settings. You can't add Express Checkout to the Product Detail Page.

The image shows a screenshot of the Salesforce Commerce interface. On the left, a 'Components' sidebar is open, listing various commerce-related components. The 'Express Checkout' component is highlighted with an orange box and a circled '1'. On the right, the 'Express Checkout' settings panel is open, showing tabs for 'Settings', 'Style', and 'Visibility'. The 'Settings' tab is active, and the 'Payment Method Set Key' field is highlighted with an orange box and a circled '2'. Below this, there are sections for 'Styling Settings' (including Button Shape, Button Size, Section Border Radius, and Section Label), 'Apple Pay', 'Google Pay', and 'PayPal'. On the far right, a partial view of a checkout page is visible, showing a 'Summary' section with a 'Subtotal' and a 'Total' section with a coupon code input field.

**Components**

- Commerce (32)
  - Action Button
  - Billing Address
  - Cart Badge
  - Cart Items
  - Cart Summary
  - Checkout Header
  - Checkout Inventory Reserv...
  - Checkout Layout: Accordion
  - Checkout Layout: One-Page
  - Checkout Notification
  - Checkout Section
  - Commerce Footer
  - Commerce Header
  - Contact Information
  - Country Selector
  - Currency Formatter
  - Express Checkout**
  - List Badge
  - Multilevel Navigation Menu
  - Navigation List Menu
  - Order List
  - Payment
  - Place Order Button
  - Profile Menu

**Express Checkout**

Settings Style Visibility

Payment Method Set Key  
alpine00001

**Styling Settings**

Button Shape  
Rectangle

Button Size  
Medium

Payment Method Set Key  
alpine00001

Section Border Radius (px)  
5

Section Label  
Express Checkout

**Apple Pay**

Button Color  
Black

**Google Pay**

Button Color  
Black

**PayPal**

**Summary**

Subtotal

Promotions

Shipping

Tax

**Total**

Enter a coupon code

WELCOME10

Promotions are not available for these products

**Promotions**

SummerSale - 10%

WELCOME10

## SEE ALSO:

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

[Salesforce Help: Add Salesforce Payments Features to Store Checkout \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Customize Payments in Checkout \(can be outdated or unavailable during release preview\)](#)

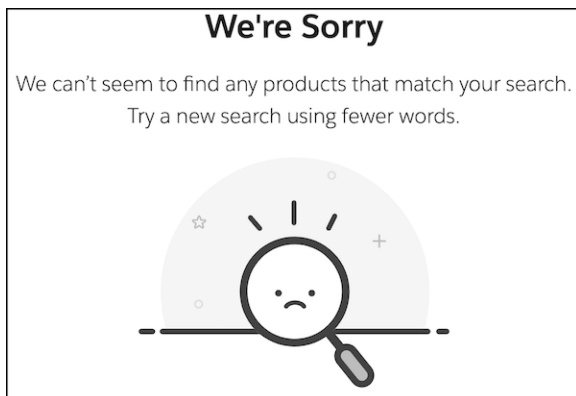
[Salesforce Help: Customize the Shopping Cart \(can be outdated or unavailable during release preview\)](#)

## Let Customers Know When There Are No Search Results

If your B2B or B2C store uses the LWR template, add the No Results Layout component to display a message on the search results page when a query yields no results. Modify the default message as needed. You can also show a message while results are loading with the Loading State component.

**Where:** This change applies to B2B Commerce and D2C Commerce in Enterprise, Unlimited, and Developer editions.

**How:** From Experience Builder, open the Search Results page. Delete the Results Layout component and replace it with the No Results Layout component. To display a message while search results are loading, drag an HTML Editor component into the Loading State component.



## SEE ALSO:

[Salesforce Help: Create a No Search Results Message \(can be outdated or unavailable during release preview\)](#)

## Additional Commerce Features

You can now welcome business accounts to D2C Commerce. Offer and manage subscriptions in your stores. Set up self-registration for B2B stores.

### [Welcome Business Accounts to D2C Commerce](#)

Set out the welcome mat for business accounts in D2C. You can now configure and register business accounts in D2C Commerce.

### [Offer and Manage Subscriptions in Your B2B and D2C Store \(Beta\)](#)

Sell virtual and digital subscriptions in your store by integrating a Subscription Management system such as Salesforce Subscription Management with Salesforce B2B and D2C Commerce. This integration lets you manage your subscription orders and collect payments, while letting your customers view their active subscriptions and payment methods. Display subscription information for any product in the Product Detail page in the Experience Builder, including product sets through the new Product Set component. Salesforce Subscription Management is not included in the Commerce License. To purchase it, you need to Contact your account representative.

### [Set Up Self-Registration for B2B Stores](#)

Encourage buyers to create an account, and enhance the buyer experience with the new, unified self-registration method. Define a profile, an account record type, permission set groups, and up to 20 buyer groups for registering buyers. All stores created after the Spring '24 release include the updated version.

### [Easily Select an Inventory Service for Your Commerce Store](#)

You can now select the inventory service provider, such as Omnichannel Inventory or a custom provider, for your store. Inventory in your storefront is active only when an inventory service is turned on.

### [Reduce Shipping Costs and Integration Times with Native Shipping](#)

Ship efficiently, improve performance, and eliminate third-party integrations using Salesforce's native shipping service. Offer your customers default free shipping, flat and price-based flexible rates, and customizable shipping zones—all configurable from your store settings. Native shipping provides a general shipping profile based on your store's default ship-to-country and currency settings. Customize your default shipping profile for your customers with unique shipping zones for countries that share shipping rates.

### [Update Product Categories in Bulk with a Category Import](#)

Add or update category paths, descriptions, and their corresponding SEO-friendly URL slugs in bulk by importing a CSV file.

### [Analyze Commerce Metrics with the Business Overview Dashboard](#)

Get key business performance metrics and data visualizations on the new Business Overview Dashboard from Commerce Analytics. Monitor average order value, order conversion rate, and more.

### [Improve Page Performance with Displayable Product Fields \(Beta\)](#)

To improve page performance on search, product, cart, and checkout pages, set up displayable product fields. When all fields used in your store's UI are configured as displayable product fields, your store can retrieve this information faster.

### [Automatically Style a Store to Match Your Brand](#)

No more having to enter your brand's colors and fonts and upload your logo image. Instead, provide the URL to your existing site, and Commerce designs the store to match your brand.

## Welcome Business Accounts to D2C Commerce

Set out the welcome mat for business accounts in D2C. You can now configure and register business accounts in D2C Commerce.

**Where:** This change applies to D2C Commerce in Enterprise, Unlimited, and Developer editions.

**How:** In your D2C Commerce store, select **Administration > Buyer Access**. Enable Self-Registration, and select *Business Account* in the **Account Record Type** field. In Experience Builder, add the new Self-Registration component to your store's Register page. Then, publish the store.

The screenshot shows the 'Self-Registration' configuration window. At the top, the 'Self-Registration' toggle is turned on, with a checkmark and the word 'Enabled'. Below this, a subtitle reads 'Customize self-registration so that customers can register themselves on your site.' The main configuration area includes a 'Profile' dropdown menu set to 'Shopper Profile', an 'Account Record Type' dropdown menu set to 'Business Account' (which is highlighted with a red rectangular box), and a 'Permission Set Group' dropdown menu set to 'SHOPPER\_PSG'. To the right of these is a 'Default Buyer Groups' section with two columns: 'Not Selected' and 'Selected'. The 'Not Selected' column contains a single entry 'B2C CodeCep...'. At the bottom of the window, there are 'Cancel' and 'Save' buttons.


SEE ALSO:

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

## Offer and Manage Subscriptions in Your B2B and D2C Store (Beta)

Sell virtual and digital subscriptions in your store by integrating a Subscription Management system such as Salesforce Subscription Management with Salesforce B2B and D2C Commerce. This integration lets you manage your subscription orders and collect payments, while letting your customers view their active subscriptions and payment methods. Display subscription information for any product in the Product Detail page in the Experience Builder, including product sets through the new Product Set component. Salesforce Subscription Management is not included in the Commerce License. To purchase it, you need to Contact your account representative.

**Where:** This change applies to B2B Commerce and D2C Commerce in Enterprise, Unlimited, and Developer editions.

 **Note:** This feature is a Beta Service. Eligible Customers may use this Beta Service subject to the applicable terms of use, as agreed to with Salesforce.

**How:** In Experience Builder, add the new Subscriptions page to your store.

SEE ALSO:

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

## Set Up Self-Registration for B2B Stores

Encourage buyers to create an account, and enhance the buyer experience with the new, unified self-registration method. Define a profile, an account record type, permission set groups, and up to 20 buyer groups for registering buyers. All stores created after the Spring '24 release include the updated version.

**Where:** This change applies to B2B Commerce and D2C Commerce in Enterprise, Unlimited, and Developer editions.

**How:** In your B2B store, select **Administration > Buyer Access**. Enable Self-Registration, and edit the applicable fields. In Experience Builder, add the new Self-Registration component to your store's Register page. Then, publish the store.

The screenshot shows the 'Self-Registration' configuration window. At the top, there is a toggle switch labeled 'Enabled' which is turned on. Below this, the text reads 'Self-Registration' and 'Customize self-registration so that customers can register themselves on your site.' The configuration is divided into several sections: 'Profile' with a dropdown menu set to 'Shopper Profile'; 'Account Record Type' with a dropdown menu set to 'None'; 'Permission Set Group' with a dropdown menu set to 'Shopper\_PSG'; and 'Default Buyer Groups' which consists of two columns: 'Not Selected' and 'Selected'. The 'Not Selected' column contains one item, 'B2C Keeb...', with a right-pointing arrow. The 'Selected' column is currently empty. At the bottom of the window, there are 'Cancel' and 'Save' buttons.

SEE ALSO:

[Salesforce Help: Configure Self-Registration for B2C Stores \(can be outdated or unavailable during release preview\)](#)

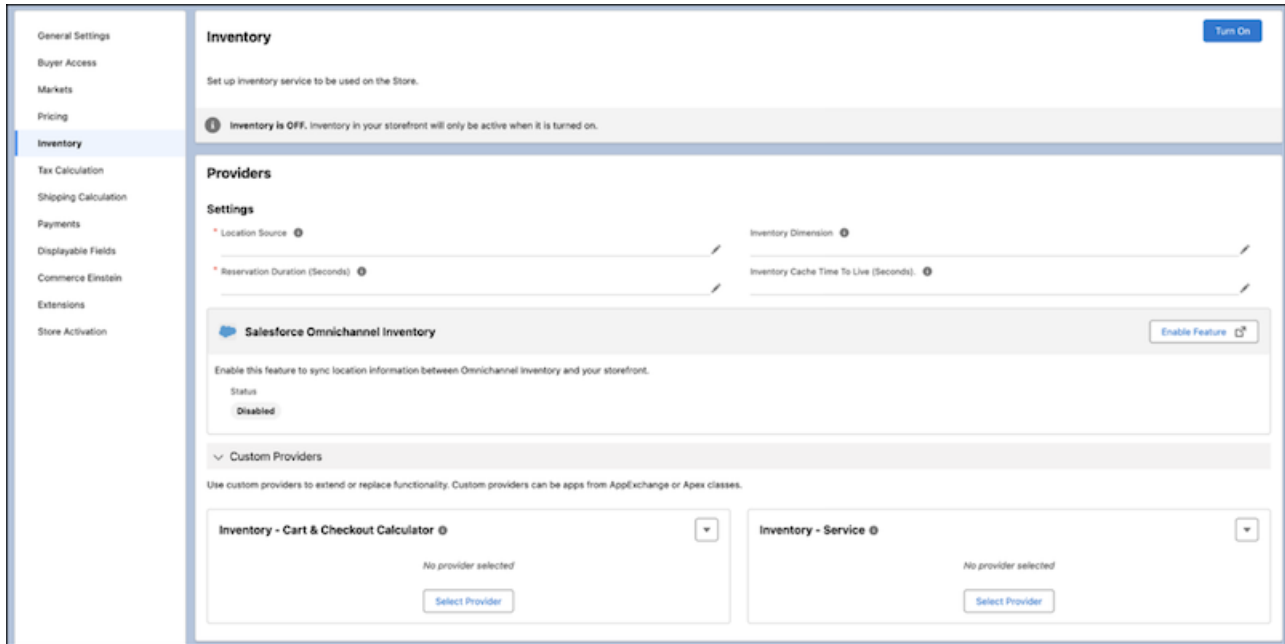
## Easily Select an Inventory Service for Your Commerce Store

You can now select the inventory service provider, such as Omnichannel Inventory or a custom provider, for your store. Inventory in your storefront is active only when an inventory service is turned on.

**Where:** This change applies to B2B Commerce and D2C Commerce in Enterprise, Unlimited, and Developer editions.

**How:** From your store's home page, click the Administration tile. In the navigation menu, select **Inventory**.





SEE ALSO:

[Salesforce Help: Set Up Inventory for Commerce Stores](#) (can be outdated or unavailable during release preview)

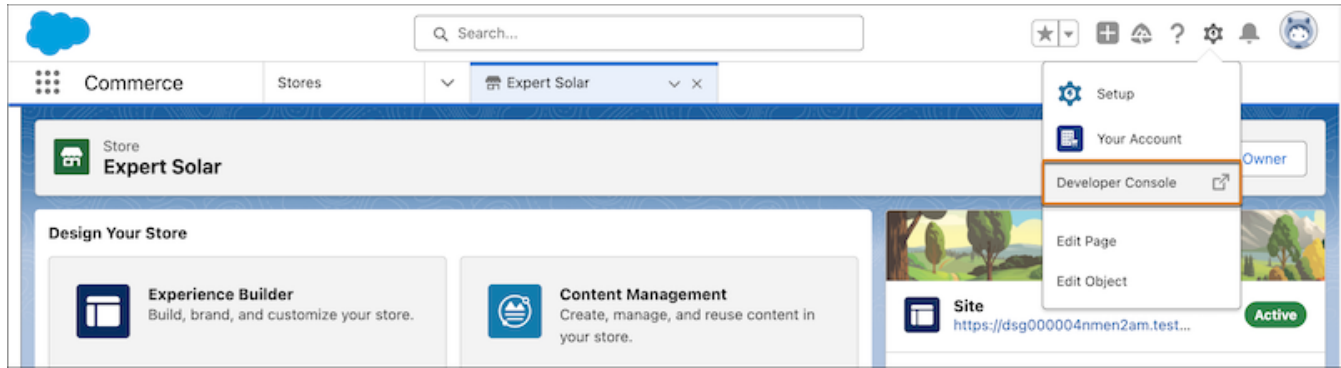
[Salesforce Help: What is Omnichannel Inventory?](#) (can be outdated or unavailable during release preview)

## Reduce Shipping Costs and Integration Times with Native Shipping

Ship efficiently, improve performance, and eliminate third-party integrations using Salesforce's native shipping service. Offer your customers default free shipping, flat and price-based flexible rates, and customizable shipping zones—all configurable from your store settings. Native shipping provides a general shipping profile based on your store's default ship-to-country and currency settings. Customize your default shipping profile for your customers with unique shipping zones for countries that share shipping rates.

**Where:** This change applies to B2B and D2C Commerce in Enterprise, Unlimited, and Developer editions.

**How:** Set up the shipping configuration via Apex in your store's Developer Console. Create zones and rates and manage profile settings on the Shipping Calculation tab of your store's Administration page.



SEE ALSO:

[Salesforce Help: Set Up Native Shipping for a Commerce Store \(can be outdated or unavailable during release preview\)](#)

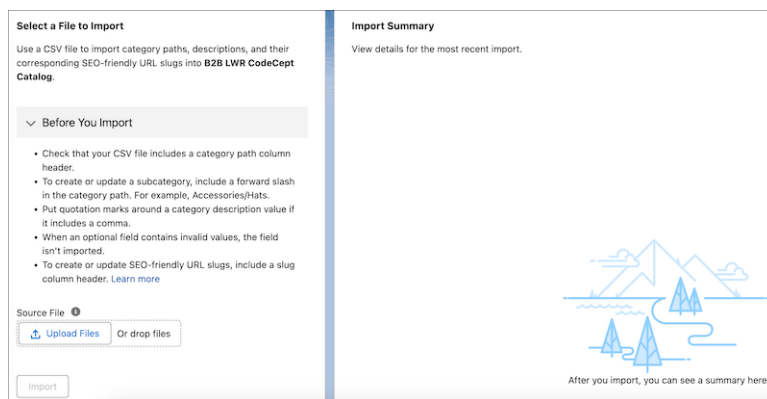
[Salesforce Help: Configure Store Language, Currency, and Tax \(can be outdated or unavailable during release preview\)](#)

## Update Product Categories in Bulk with a Category Import

Add or update category paths, descriptions, and their corresponding SEO-friendly URL slugs in bulk by importing a CSV file.

**Where:** This change applies to B2B Commerce and D2C Commerce in Enterprise, Unlimited, and Developer editions.

**How:** From the Commerce App Navigation menu, select **Catalogs** and click the catalog that you want to update. From the Categories tab on the Catalog page, click **Import**. Click **Upload Files** and open your CSV file. Click **Import** and wait for the upload to complete.



SEE ALSO:

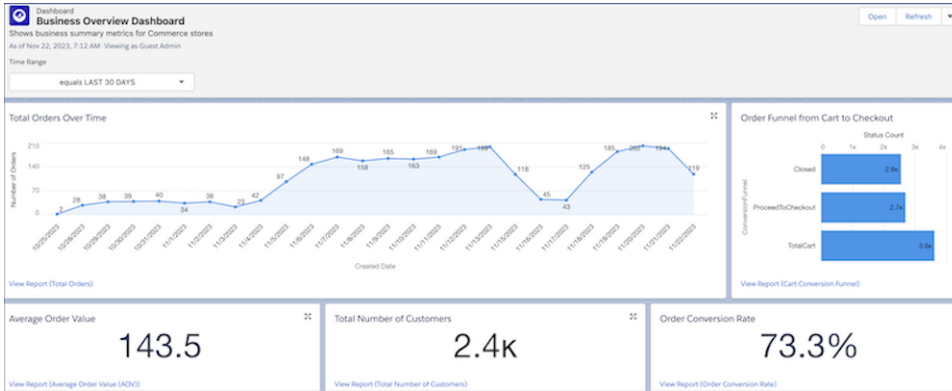
[Salesforce Help: SEO-Friendly URLs for Store Categories \(can be outdated or unavailable during release preview\)](#)

## Analyze Commerce Metrics with the Business Overview Dashboard

Get key business performance metrics and data visualizations on the new Business Overview Dashboard from Commerce Analytics. Monitor average order value, order conversion rate, and more.

**Where:** This change applies to B2B Commerce and D2C in Enterprise, Unlimited, and Developer editions.

**How:** From Commerce Setup, go to **Commerce Analytics > Dashboards & Reports** and click **Install**.



SEE ALSO:

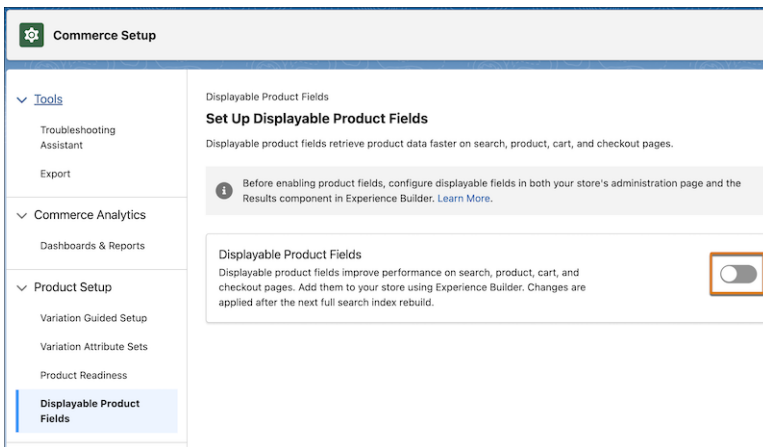
[Salesforce Help: Commerce Analytics \(can be outdated or unavailable during release preview\)](#)

## Improve Page Performance with Displayable Product Fields (Beta)

To improve page performance on search, product, cart, and checkout pages, set up displayable product fields. When all fields used in your store's UI are configured as displayable product fields, your store can retrieve this information faster.

**Where:** This change applies to B2B Commerce and D2C Commerce in Enterprise, Unlimited, and Developer editions.

**How:** Before enabling displayable product fields, configure displayable fields on your store's administration page and in the Results component in Experience Builder. Then, in Commerce Setup, go to Product Setup and turn on Displayable Product Fields.



SEE ALSO:

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

## Automatically Style a Store to Match Your Brand

No more having to enter your brand's colors and fonts and upload your logo image. Instead, provide the URL to your existing site, and Commerce designs the store to match your brand.

**Where:** This change applies to B2B Commerce and D2C Commerce in Enterprise, Unlimited, and Developer editions.

**How:** From the Commerce Setup Assistant, click **Brand the site** and enter the URL.

SEE ALSO:

[Brand a Commerce Store](#)

## Omnichannel Inventory

View if shipping has been disabled for a product in the Omnichannel Inventory console.

[View If Shipping Is Disabled for a Product](#)

You can now see if shipping has been disabled for an item on the Inventory Lookup tab in the Omnichannel Inventory Console. Controlling which SKUs are available for shipping from a particular location was introduced in the Winter '24 release, but the information wasn't visible.

### View If Shipping Is Disabled for a Product

You can now see if shipping has been disabled for an item on the Inventory Lookup tab in the Omnichannel Inventory Console. Controlling which SKUs are available for shipping from a particular location was introduced in the Winter '24 release, but the information wasn't visible.

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

**How:** Go to the Home page in the Omnichannel Inventory console. On the Inventory Lookup tab, enter a SKU and select a location group. Select **Get Inventory Data** and look in the Disable Shipping column.

Location Group	Reference ID	ATF	ATD	On Hand	Future	Future Expected	Reservations	Safety
East-05Aah	East-789pM	0	0	0	0	-	0	0

Location	Reference ID	ATF	ATD	On Hand	Future	Future Expected	Reservations	Safety	Disable Shipping
Warehouse-TXKZJU	Warehouse-TX-KLUT7	0	0	0	0	-	0	0	✓
Store-NY-5000n	Store-NY-072u4	0	0	0	0	-	0	0	✓
Warehouse-NY-0205K	Warehouse-NY-CQ5KX	0	0	0	0	-	0	0	✓

SEE ALSO:

[Salesforce Help: Get Started with the Omnichannel Inventory Console \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: What is Omnichannel Inventory? \(can be outdated or unavailable during release preview\)](#)

## Salesforce Order Management

Use the new exchange API to create a single flow for product returns and exchanges. Exchanges cuts out the middle step by letting customer service representatives apply an exchange balance directly to a new product. Use Order on Behalf Of to reach more customers with new guest checkout. Use the simplified Order Creation API independently of the High Scale Order API by enabling High Scale for B2CE Integration.

### [Place Orders on Behalf Of Guest Shoppers](#)

Expand your customer base by increasing the number of customers that you can place orders on behalf of. You can now place orders directly on behalf of guest shoppers with B2B and D2C Commerce.

### [Simplify Order Creation with the High Scale Order Integration](#)

Easily bring in orders from other sales channels, such as external marketplaces, by enabling High Scale for B2CE Integration. The integration uses the simplified Order Creation API independently of the High Scale Order API.

### [Provide Exchanges for Fulfilled Items](#)

Process product returns and exchanges in a single flow by creating and implementing a custom exchange workflow using the new exchange APIs. The exchange APIs also calculate whether additional funds are needed or if a refund is necessary as a result of the exchange. Previously, to exchange a product, a customer service representative would process the return and then add a new item to an order.

### [Provide More Product Information with the Order Management Product Selector Component](#)

Give your customers more product details by adding fields, such as quantity or price, to your order product summaries. The Order Management Product Selector Component is a flow component that you can add to flows in Flow Builder.

### [Order Management Flow Type Field Has a New Name](#)

To align Order Management flow terminology with Salesforce Flow Builder names, the Order Management Flow Type field is now called Transaction Type. In Flow Builder, Flow Type defines the type of flow, such as a screen flow or an autolaunched flow. Order Management previously used Flow Type to define a specific flow, such as Return or Exchange. Transaction Type is now used to define a specific flow.

## Place Orders on Behalf Of Guest Shoppers

Expand your customer base by increasing the number of customers that you can place orders on behalf of. You can now place orders directly on behalf of guest shoppers with B2B and D2C Commerce.

**Where:** This change applies to Order Management, B2B Commerce, and D2C Commerce in Unlimited, Developer, and Enterprise editions.

**How:** To place an order on behalf of a guest customer, create a person account in the account entity. Launch the Order on Behalf Of flow from the new account, and place the order the same way you would for a registered user.

SEE ALSO:

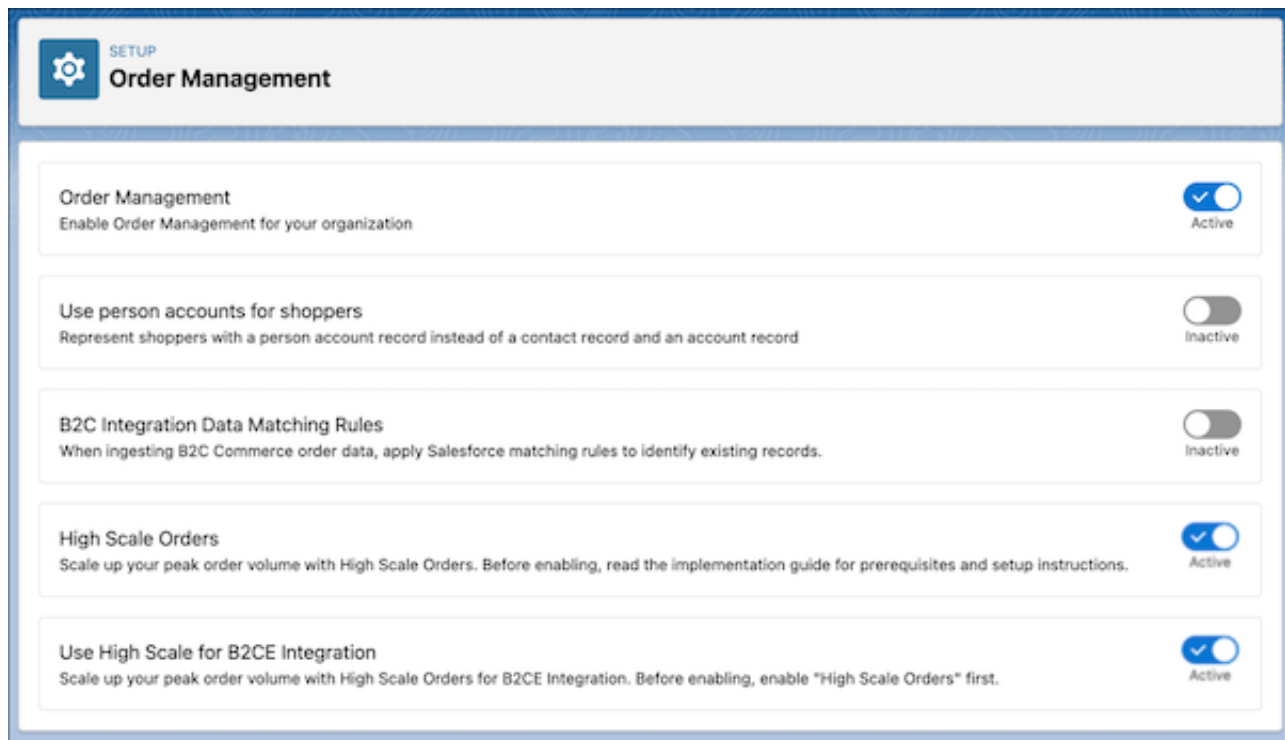
[Salesforce Help: Place an Order on Behalf Of a Customer \(can be outdated or unavailable during release preview\)](#)

## Simplify Order Creation with the High Scale Order Integration

Easily bring in orders from other sales channels, such as external marketplaces, by enabling High Scale for B2CE Integration. The integration uses the simplified Order Creation API independently of the High Scale Order API.

**Where:** This change applies to Order Management, B2B Commerce, and D2C Commerce in Unlimited, Developer, and Enterprise editions.

**How:** From Setup, in the Quick Find box, enter `Order Management`, and select **High Scale Orders**. Then select **Use High Scale for B2CE Integration**.



SEE ALSO:

[Salesforce Help: High-Scale Orders \(can be outdated or unavailable during release preview\)](#)

## Provide Exchanges for Fulfilled Items

Process product returns and exchanges in a single flow by creating and implementing a custom exchange workflow using the new exchange APIs. The exchange APIs also calculate whether additional funds are needed or if a refund is necessary as a result of the exchange. Previously, to exchange a product, a customer service representative would process the return and then add a new item to an order.

**Where:** This change applies to Order Management in Unlimited, Developer, and Enterprise editions.

SEE ALSO:

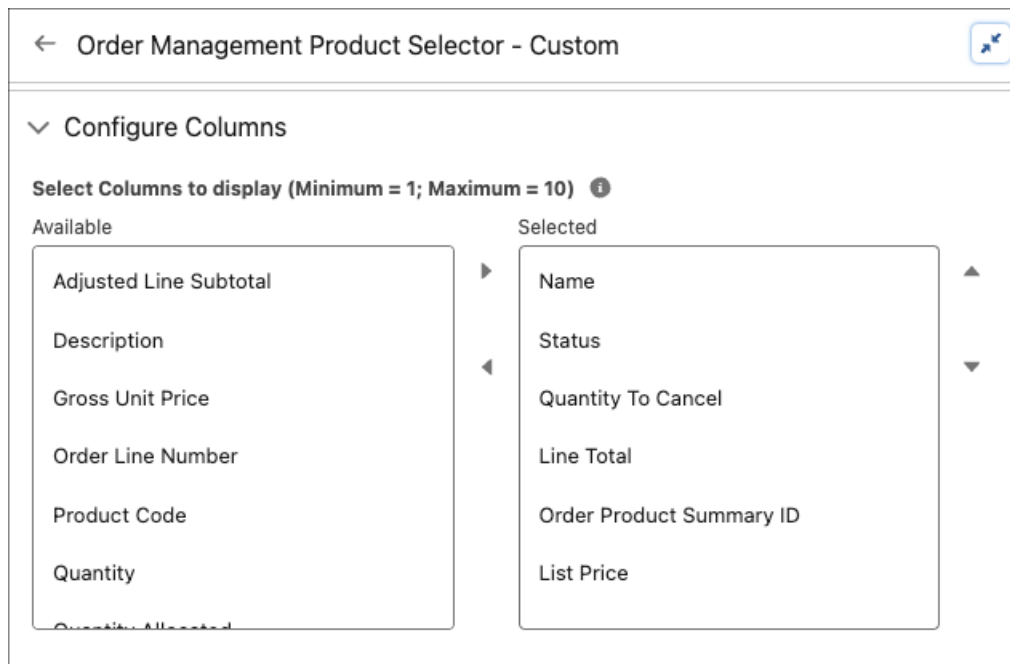
[Salesforce Help: Exchange an Order Item \(can be outdated or unavailable during release preview\)](#)

## Provide More Product Information with the Order Management Product Selector Component

Give your customers more product details by adding fields, such as quantity or price, to your order product summaries. The Order Management Product Selector Component is a flow component that you can add to flows in Flow Builder.

**Where:** This change applies to Order Management Unlimited, Developer, and Enterprise editions.

**How:** Configure columns for each field you want to show.



SEE ALSO:

[Salesforce Help: Order Management Product Selector Component \(can be outdated or unavailable during release preview\)](#)

## Order Management Flow Type Field Has a New Name

To align Order Management flow terminology with Salesforce Flow Builder names, the Order Management Flow Type field is now called Transaction Type. In Flow Builder, Flow Type defines the type of flow, such as a screen flow or an autolaunched flow. Order Management previously used Flow Type to define a specific flow, such as Return or Exchange. Transaction Type is now used to define a specific flow.

**Where:** This change applies to Order Management in Unlimited, Developer, and Enterprise editions.

## Salesforce Payments

Improve your Pay Now page by using the new Checkout with Order payment link. Let Pay Now customers register and log in using one-click checkout. Accept popular digital wallets by enabling express payment methods, and give customers more ways to manage their saved payment methods.

### [Expand Pay Now Checkout with Subscriptions and Tax and Shipping Options](#)

A new type of payment link, called Checkout with Order, takes payers to a new Pay Now Checkout page. The page lists physical and subscription products, calculates the tax, and provides shipping options based on the shipping address and products purchased. After a payer completes the transaction, an order record is created, which you can view using any integrated order management product, such as Salesforce Order Management.

### [Sell Subscriptions Through Pay Now](#)

Add subscription products to your Pay Now page using the new Checkout with Order payment link. The product line item includes the type of subscription payment, such as a one-time payment or auto-recurring. For term-defined subscriptions, you can select when the subscription expires.

### [Automate Payment Link Creation Using Flow Builder](#)

Easily create a payment link for Pay Now transactions using the Generate Payment Link flow, which you can clone and customize for your workflow. You can then copy the link and send it to your customer. The link sends that customer to the Pay Now page to complete the transaction.

### [Register and Log In Customers with One-Click Checkout](#)

Simplify Pay Now purchases with one-click checkout, which features passwordless login. Users can log in and sign up for an account without the trouble of remembering usernames and passwords. During checkout, customers receive a one-time password to verify their identity. Customers can choose to register and save their shipping and payment information for faster checkout in the future or check out as a guest.

### [Make Pay Now Transactions Easier with Express Payments \(Generally Available\)](#)

Express Payments for Pay Now is generally available. Enable express payments on your Pay Now page as a quick and convenient checkout option for your customers. Accepted express payment methods include digital wallets, such as Apple Pay, Google Pay, Paypal, and Venmo.

### [Extend How Customers Manage Payment Methods from My Account](#)

Previously, registered customers could only select a default payment method and delete a payment method from My Account. Now, they can also add payment methods.

### [Accept Pay Now Payments Using a QR Code](#)

Let customers make payments by scanning a QR code with their mobile device. Send the QR Code in a text or email to your customers. The code takes them to a Pay Now page to complete the transaction.

## Expand Pay Now Checkout with Subscriptions and Tax and Shipping Options

A new type of payment link, called Checkout with Order, takes payers to a new Pay Now Checkout page. The page lists physical and subscription products, calculates the tax, and provides shipping options based on the shipping address and products purchased. After a payer completes the transaction, an order record is created, which you can view using any integrated order management product, such as Salesforce Order Management.

**Where:** This change applies to Pay Now in Enterprise and Unlimited editions.

**How:** When you set up your Pay Now site in Experience Builder, select the Checkout page. To create the payment link, use the Generate Payment Link flow in Flow Builder.



alpine group

Please pay this amount  
**\$50.95**

Thank you for your purchase. Enjoy!

Your cart

GoBrew Moca MCT + Protein Vegetarian, 6 oz can - 6 pack (3) \$41.97

**Contact Information** [Change](#)

\* Email

\* Phone Number

**Shipping** [Change](#)

Jane Doe Default  
123 Broadway  
New York, NY 11000  
United States  
[Edit Address](#)

John Doe  
5 Wall Street  
Burlington, MA 01803  
United States

**Summary**

Subtotal	\$41.97
Shipping	\$11.99
Tax	\$1.99
<b>Total</b>	<b>\$50.95</b>

SEE ALSO:

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

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

## Sell Subscriptions Through Pay Now

Add subscription products to your Pay Now page using the new Checkout with Order payment link. The product line item includes the type of subscription payment, such as a one-time payment or auto-recurring. For term-defined subscriptions, you can select when the subscription expires.

**Where:** This change applies to Pay Now in Enterprise and Unlimited editions.

**How:** When you set up your Pay Now site in Experience Builder, select the Checkout page. Use the Generate Payment Link flow in Flow Builder, and create the payment link with products from the product selection page.

Search

50 Items [Products Added \(4\)](#)

	<input type="checkbox"/>	Name	SKU	Type	Price
1	<input type="checkbox"/>	Alpine Energy CO2 Cartridge for Smart Dispe...	6010007	Simple	\$55.50
2	<input checked="" type="checkbox"/>	Alpine Energy Drink Chai During 0.5L PET - 6...	6010008	Simple	\$20.50
3	<input checked="" type="checkbox"/>	Alpine Energy Drink Chai During 0.5L PET - 6...	6010008	Subscription: Term-Defined Monthly	Select e
4	<input checked="" type="checkbox"/>	Alpine Energy Drink Chai Post 0.5L PET - 6 p...	6010009	Simple	\$20.50
5	<input checked="" type="checkbox"/>	Alpine Energy Drink Chai Post 0.5L PET - 6 p...	6010009	Subscription: Term-Defined Monthly	Select e
6	<input type="checkbox"/>	Alpine Energy Drink Chai Pre 0.5L PET - 6 pa...	6010010	Simple	\$20.50

Start Over
Add Products

SEE ALSO:

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

## Automate Payment Link Creation Using Flow Builder

Easily create a payment link for Pay Now transactions using the Generate Payment Link flow, which you can clone and customize for your workflow. You can then copy the link and send it to your customer. The link sends that customer to the Pay Now page to complete the transaction.

**Where:** This change applies to Pay Now in Enterprise and Unlimited editions.

**Who:** Salesforce Payments Administrators who have access to Setup to access Flow Builder.

**How:** In Flow Builder, copy and customize the standard flow. To launch the flow from an object record, add an action to the object, and then add the action to the object's page layout. The action triggers the flow to create a payment link. Here's an example of a Generate Payment Link button in a quote record that starts the flow.

The screenshot displays the Salesforce interface for a quote titled "Project1 Estimate". At the top right, a button labeled "Generate Payment Link" is highlighted with an orange border. Below the header, a table lists key details: Quote Number (00000001), Expiration Date (12/20/2023), Syncing (unchecked), Opportunity Name (Corp1), Account Name (Corp1), and Grand Total (USD 0.00). A progress bar below the table shows stages: Rejected, Presented, Accepted, and Denied, with "Approved" currently selected. The main content area is divided into "Related" and "Activity" sections. The "Related" section includes "Quote Line Items (0)", "Quote PDFs (0)", and "Notes & Attachments (0)". The "Activity" section shows filters for "All time" and "All", and a section for "Upcoming & Overdue" with the message "No activities to show. Get started by sending an email, schedule a meeting, or create a task."

## SEE ALSO:

[Salesforce Help: Integrate Pay Now into Your Salesforce Apps \(can be outdated or unavailable during release preview\)](#)

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

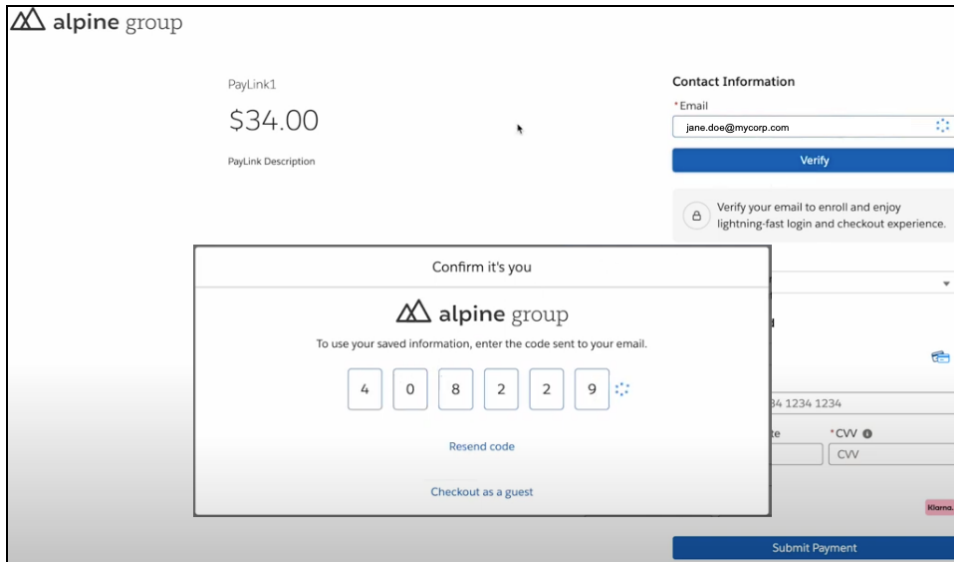
[Salesforce Help: Provide Actions, Buttons, and Links \(can be outdated or unavailable during release preview\)](#)

## Register and Log In Customers with One-Click Checkout

Simplify Pay Now purchases with one-click checkout, which features passwordless login. Users can log in and sign up for an account without the trouble of remembering usernames and passwords. During checkout, customers receive a one-time password to verify their identity. Customers can choose to register and save their shipping and payment information for faster checkout in the future or check out as a guest.

**Where:** This change applies to Pay Now in Enterprise and Unlimited editions.

**How:** Set up a Pay Now site, and enable the Universal Registration permission in the site's Administration settings. In Experience Builder, the Pay Now Pay or Checkout page layouts include the required components.



## SEE ALSO:

[Salesforce Help: Create a Pay Now Site \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Configure Your Self-Registration Page \(can be outdated or unavailable during release preview\)](#)

## Make Pay Now Transactions Easier with Express Payments (Generally Available)

Express Payments for Pay Now is generally available. Enable express payments on your Pay Now page as a quick and convenient checkout option for your customers. Accepted express payment methods include digital wallets, such as Apple Pay, Google Pay, Paypal, and Venmo.

**Where:** This change applies to Pay Now in Enterprise and Unlimited editions.

**How:** On the Experience Builder Pay page, in the Pay Now component properties, select **Enable express payments**. Customers see a Pay Now page with an Express Payments button.

alpine group

paynow

\$50.00

Thank you for your payment

Express Payments

Or

Contact Information

\*First Name \*Last Name

\*Email

\*Billing Country  
United States

Payment Method

Credit Card

\*Card Number  
1234 1234 1234 1234

\*Expiration Date \*CVW  
MM / YY CVW

Klarna

Google Pay

Submit Payment

SEE ALSO:

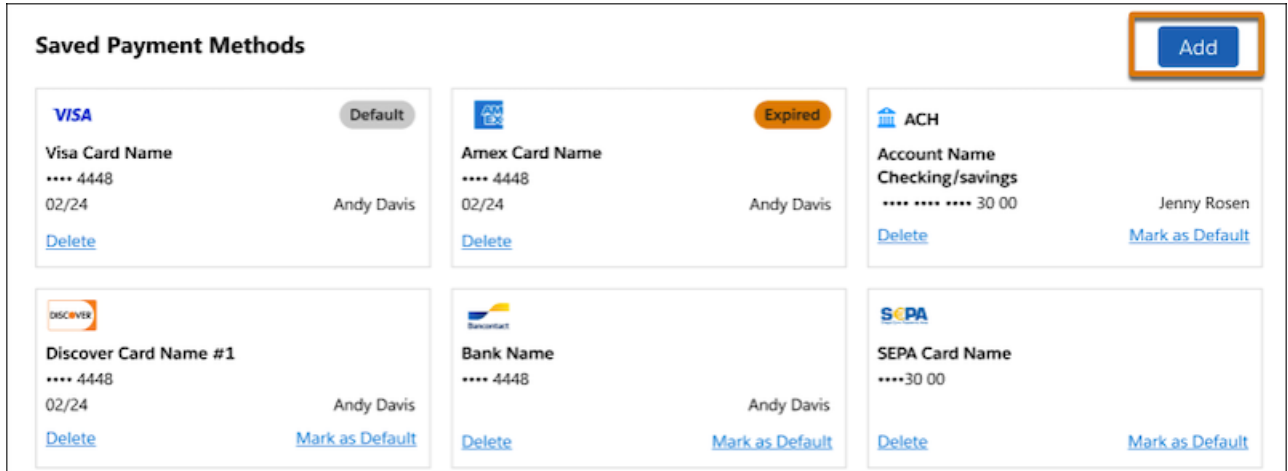
[Salesforce Help: Enable Express Payments for Pay Now \(can be outdated or unavailable during release preview\)](#)

## Extend How Customers Manage Payment Methods from My Account

Previously, registered customers could only select a default payment method and delete a payment method from My Account. Now, they can also add payment methods.

**Where:** This change applies to Salesforce Payments in Enterprise and Unlimited editions.

**How:** The Saved Payment Methods component on the My Account page includes an Add button.



SEE ALSO:


[Salesforce Help: Let Customers Manage Their Saved Payment Methods](#) (can be outdated or unavailable during release preview)

## Accept Pay Now Payments Using a QR Code

Let customers make payments by scanning a QR code with their mobile device. Send the QR Code in a text or email to your customers. The code takes them to a Pay Now page to complete the transaction.

**Where:** This change applies to Pay Now in Enterprise and Unlimited editions.

**How:** When you create a payment link, a QR code is generated by default in the payment link record.




Payment Link  
**PL-000000007**

Status	Amount	Payment Url	Usage Type
Active		<a href="https://pay4.test1.my.pc-rnd.site.com/paynow1/checkout?paymentLinkId=12fSB0000000BzZ">https://pay4.test1.my.pc-rnd.site.com/paynow1/checkout?paymentLinkId=12fSB0000000BzZ</a>	Multiple Uses

Related **Details**

▼ Payment Link Information

<p>Payment Link Number PL-000000007</p>	<p>Payment Url <a href="https://pay4.test1.my.pc-rnd.site.com/paynow1/checkout?paymentLinkId=12fSB0000000BzZ">https://pay4.test1.my.pc-rnd.site.com/paynow1/checkout?paymentLinkId=12fSB0000000BzZ</a></p>
<p>Type Checkout With Order</p>	<p>Currency ISO Code USD - U.S. Dollar <span style="float: right;">✎</span></p>
<p>Amount <span style="float: right;">✎</span></p>	<p>Tax Amount</p>
<p>Payment Method Set <a href="#">PMS-000000001</a> <span style="float: right;">✎</span></p>	<p>Status Active <span style="float: right;">✎</span></p>
<p>Title Test2 <span style="float: right;">✎</span></p>	<p>Description <span style="float: right;">✎</span></p>
<p>Account <span style="float: right;">✎</span></p>	
<p>Cart <a href="#">Cart</a></p>	
<p>QR Code</p> <div style="text-align: center;">  </div>	

SEE ALSO:

[Salesforce Help: Integrate Pay Now into Your Salesforce Apps \(can be outdated or unavailable during release preview\)](#)

## Customization

Give record page users more of what they need where and when they need it with enhancements to Dynamic Forms-enabled Lightning pages. Access invoice, payment, shipment, and return data in Snowflake more easily using Salesforce Connect adapter for SQL.

### Lightning App Builder

Give your users more of the information they need in one place with cross-object fields and field-level visibility rules on Dynamic Forms-enabled record pages. Personalize record pages even further for your mobile users with dynamic actions for standard objects on mobile devices.

### [Salesforce Connect](#)

Get to know the updated Salesforce Connect adapter for Amazon Athena, now called Salesforce Connect adapter for SQL. Natively integrate Snowflake data with Salesforce, and take advantage of Snowflake's interactive query capabilities.

### [Sharing](#)

Updates to organization-wide defaults process quicker, and faster account sharing recalculation is enforced through a release update.

### [Permissions](#)

Permission set groups are available in all editions. You now receive a notification before deleting permission sets if they're assigned to users via a permission set group.

### [Globalization](#)

Enforcement of ICU Locale formats now begins on a rolling basis. English (Italy) and three new Mayan languages are available as platform-only languages. Stay up to date with ICU locale formats.

### [Fields](#)

You now see a confirmation message that reminds you to review multi-select picklist field limitations.

### [AppExchange](#)

Discover solutions based on a business challenge or interest using the new Explore experience. Find what you need on the marketplace in fewer clicks using the streamlined navigation bar.

### [General Setup](#)

Create an Apex client that can handle asynchronous callouts. Restrict a user's access to your org's list of roles when they edit list view visibility. Enhance API performance by removing updates to MRU items.

## Lightning App Builder

Give your users more of the information they need in one place with cross-object fields and field-level visibility rules on Dynamic Forms-enabled record pages. Personalize record pages even further for your mobile users with dynamic actions for standard objects on mobile devices.

### [IdeaExchange Delivered: Add Fields from Related Objects to Dynamic Forms-Enabled Pages](#)

Drill into lookup relationship fields from the component palette in the Lightning App Builder and access fields from related objects. To display relevant data from related objects, drag the cross-object fields onto your record page. We delivered this feature thanks to your ideas on IdeaExchange.

### [Set Field Visibility by Device in Dynamic Forms](#)

Previously, you could set visibility rules based on device form factor on Field Sections and other components but not on individual fields. Now, you can customize your desktop and mobile Lightning record pages even more granularly and restrict field visibility by device form factor, such as desktop or phone.

### [IdeaExchange Delivered: Use Dynamic Actions with Standard Objects on Mobile](#)

Give users more personalized experiences on record pages by using dynamic actions for standard objects on mobile devices. Assign actions in the Lightning App Builder instead of the page layout, and apply filters to control when and where actions appear for users. Set filters based on user fields, form factors, and other criteria. We delivered this feature thanks to your ideas on IdeaExchange.

### [Dynamic Forms on Mobile Is Enabled by Default in New Orgs](#)

New orgs created in Spring '24 and later have Dynamic Forms on Mobile enabled by default.



### [IdeaExchange Delivered: Translate the Related List Label in the Dynamic Related List - Single Component](#)

To show users the Related List label in their language, create a custom label with translations in Setup. In the Lightning App Builder, go to the Lightning page where you want to include the Dynamic Related List - Single component. Enter `{!$Label.customLabelName}` in the Related List Label field, replace "customLabelName" with the name of your custom label, and save your changes. Users whose language is set to the language of your translated custom label see the translated value. We delivered this feature thanks to your ideas on IdeaExchange.

### [See a Field's Object Relationship and API Name in Dynamic Forms](#)

In the Lightning App Builder, all fields on Dynamic Forms-enabled pages have two new properties: Object and API Name. The Object property shows the object that the field is associated with, which is helpful when your page has fields from more than one object. The API Name property shows the unique API name of the field.

### [Use Dynamic Forms on Pinned Region Pages](#)

Now you can use Dynamic Forms on Lightning pages that are based on pinned region page templates.

### [Preview Mobile Actions on Record Pages Before Activating](#)

When you create actions on record pages in Lightning App Builder, use the Phone preview option to see how they appear on mobile devices. The mobile preview also shows you if any actions aren't available on mobile devices.

### [Create a Custom Omni Supervisor Page](#)

Use the new Omni Supervisor Page Lightning page type to create your own tabs for supervisors in Omni Supervisor.



## Add Fields from Related Objects to Dynamic Forms-Enabled Pages

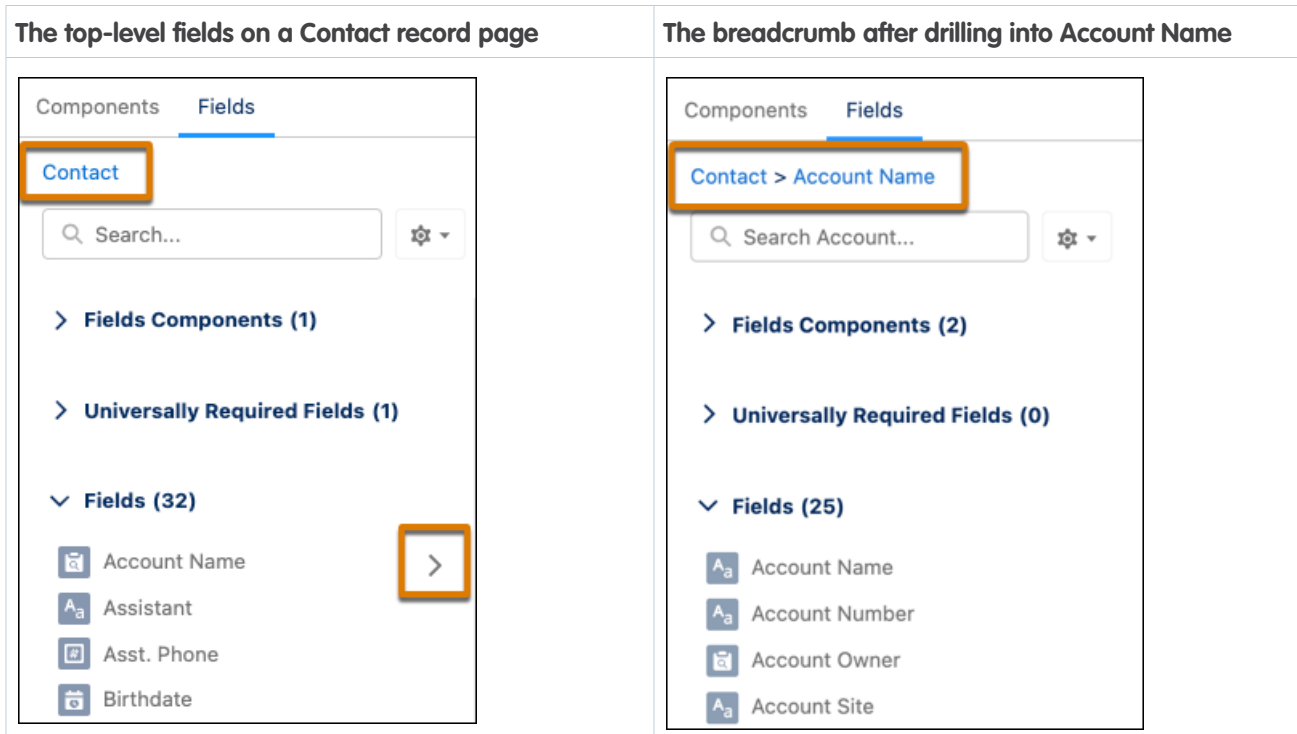
Drill into lookup relationship fields from the component palette in the Lightning App Builder and access fields from related objects. To display relevant data from related objects, drag the cross-object fields onto your record page. We delivered this feature thanks to your ideas on IdeaExchange.

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

**How:** We made some small enhancements to the Lightning App Builder UI to help you navigate through relationship fields.

On the Fields tab, a breadcrumb at the top shows the spans that you drilled into. The top-level breadcrumb indicates the object that the page is associated with.

Cross-object relationship fields have an arrow icon (>). You can drag them onto the page as is, or click the arrow icon to drill in.



When you select a cross-object field on the canvas, a new Object property shows the relationship of the field to the base object associated with the Lightning page.

You can drill down two levels. Polymorphic relationship fields—where the related object can be one of several different types of objects—aren't supported as cross-object fields in Lightning App Builder.

SEE ALSO:

[See a Field's Object Relationship and API Name in Dynamic Forms](#)

## Set Field Visibility by Device in Dynamic Forms

Previously, you could set visibility rules based on device form factor on Field Sections and other components but not on individual fields. Now, you can customize your desktop and mobile Lightning record pages even more granularly and restrict field visibility by device form factor, such as desktop or phone.

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

**How:** On a Dynamic Forms-enabled page in the Lightning App Builder, select a field on the canvas. In the properties pane, create a visibility rule filter using the Device context to set the field to display exclusively when its page is viewed in a specific experience.

SEE ALSO:

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



## Use Dynamic Actions with Standard Objects on Mobile

Give users more personalized experiences on record pages by using dynamic actions for standard objects on mobile devices. Assign actions in the Lightning App Builder instead of the page layout, and apply filters to control when and where actions appear for users. Set filters based on user fields, form factors, and other criteria. We delivered this feature thanks to your ideas on IdeaExchange.

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

## Dynamic Forms on Mobile Is Enabled by Default in New Orgs

New orgs created in Spring '24 and later have Dynamic Forms on Mobile enabled by default.

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

**How:** You can find the Dynamic Forms on Mobile setting in Setup. In the Quick Find box, enter *Mobile*, then select **Salesforce Mobile App**.

SEE ALSO:

[Salesforce Help: Enable Dynamic Forms on Mobile \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Break Up Your Record Details with Dynamic Forms \(can be outdated or unavailable during release preview\)](#)



## Translate the Related List Label in the Dynamic Related List - Single Component

To show users the Related List label in their language, create a custom label with translations in Setup. In the Lightning App Builder, go to the Lightning page where you want to include the Dynamic Related List - Single component. Enter

`{!$Label.customLabelName}` in the Related List Label field, replace "customLabelName" with the name of your custom label, and save your changes. Users whose language is set to the language of your translated custom label see the translated value. We delivered this feature thanks to your ideas on IdeaExchange.

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

SEE ALSO:

[Salesforce Help: Build Localized Component Labels and Attribute Values on Lightning Pages with Custom Labels](#)

## See a Field's Object Relationship and API Name in Dynamic Forms

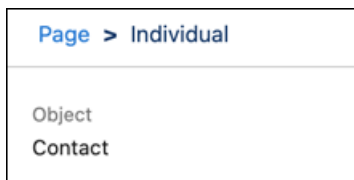
In the Lightning App Builder, all fields on Dynamic Forms-enabled pages have two new properties: Object and API Name. The Object property shows the object that the field is associated with, which is helpful when your page has fields from more than one object. The API Name property shows the unique API name of the field.

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

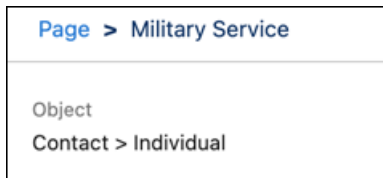
**How:** Click a field in a Dynamic Forms-enabled page in the Lightning App Builder to see the new API Name and Object properties in the property pane.

For cross-object fields, the Object property shows the relationship of the field's object to the base object associated with the Lightning page.

For example, on a contact record page, if you add the Individual field and look at its properties, the Object property shows you that it's from the Contact object.



If you drill into the Individual field and add the Individual object's Military Service field to your page, the Object property shows you the full object relationship mapping of the Military Service field. Military Service is on the Individual object, but you also see its parent object relationship to Contact.



SEE ALSO:

[IdeaExchange Delivered: Add Fields from Related Objects to Dynamic Forms-Enabled Pages](#)

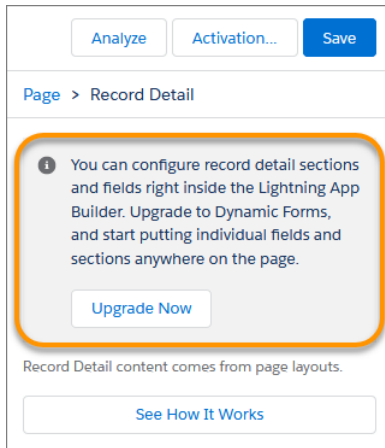
## Use Dynamic Forms on Pinned Region Pages

Now you can use Dynamic Forms on Lightning pages that are based on pinned region page templates.

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

**How:** You can use Dynamic Forms on pinned region pages the same way you use it on non-pinned region pages. Create the page in the Lightning App Builder using a pinned region template, then click the **Fields** tab. Add a Field Section component to the page, and drag the desired fields into the Field Section component. Existing pinned region pages that don't contain a Record Detail component can start using Dynamic Forms in the same way.

If your existing pinned region page has a Record Detail component, click the component. Then in the detail pane, click **Upgrade Now** to start the Dynamic Forms migration wizard.



SEE ALSO:

[Salesforce Help: Migrate a Record Page to Dynamic Forms](#)

[Salesforce Help: Lightning Page Templates](#)

## Preview Mobile Actions on Record Pages Before Activating

When you create actions on record pages in Lightning App Builder, use the Phone preview option to see how they appear on mobile devices. The mobile preview also shows you if any actions aren't available on mobile devices.

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

## Create a Custom Omni Supervisor Page

Use the new Omni Supervisor Page Lightning page type to create your own tabs for supervisors in Omni Supervisor.

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

SEE ALSO:

[Create Custom Tabs for Omni Supervisor](#)

[Salesforce Help: Lightning Page Types \(can be outdated or unavailable during release preview\)](#)

## Salesforce Connect

Get to know the updated Salesforce Connect adapter for Amazon Athena, now called Salesforce Connect adapter for SQL. Natively integrate Snowflake data with Salesforce, and take advantage of Snowflake's interactive query capabilities.

[Salesforce Connect Adapter for Amazon Athena Is Now Salesforce Connect Adapter for SQL](#)

The Salesforce Connect adapter for Amazon Athena is renamed Salesforce Connect adapter for SQL. In addition to Amazon Athena, the SQL adapter can support other external sources that expose their capabilities via REST APIs and offer query and DML operations using SQL. All functionality for existing external data sources mapped to Amazon Athena remains the same.

### [Connect Securely to Snowflake and Perform Interactive Queries from Salesforce](#)

Use the Salesforce Connect adapter for SQL to access and work with Snowflake data without copying or syncing it to Salesforce. Perform queries, execute DML operations, and manage metadata to configure external objects easily.

## Salesforce Connect Adapter for Amazon Athena Is Now Salesforce Connect Adapter for SQL

The Salesforce Connect adapter for Amazon Athena is renamed Salesforce Connect adapter for SQL. In addition to Amazon Athena, the SQL adapter can support other external sources that expose their capabilities via REST APIs and offer query and DML operations using SQL. All functionality for existing external data sources mapped to Amazon Athena remains the same.

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

SEE ALSO:

[Salesforce Help: Access External Data with the Salesforce Connect Adapter for SQL \(can be outdated or unavailable during release preview\)](#)

## Connect Securely to Snowflake and Perform Interactive Queries from Salesforce

Use the Salesforce Connect adapter for SQL to access and work with Snowflake data without copying or syncing it to Salesforce. Perform queries, execute DML operations, and manage metadata to configure external objects easily.

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

**Why:** Often, Salesforce is the system of record for customer information and sales, while order details are stored in Snowflake. With the Salesforce Connect adapter for SQL, Salesforce service and support agents can easily access invoice, payment, shipment, and return data in Snowflake.

**How:** Define an external data source of type SQL and choose Snowflake as the provider. Then, connect Salesforce to access and query data stored in Snowflake.

SEE ALSO:

[Salesforce Help: Salesforce Connect SQL Adapter for Snowflake \(can be outdated or unavailable during release preview\)](#)

## Sharing

Updates to organization-wide defaults process quicker, and faster account sharing recalculation is enforced through a release update.

### [Update Organization-Wide Defaults Faster](#)

Changes to organization-wide defaults now process quicker when you have a large number of parent accounts, person accounts, or associated portal accounts. You can monitor the progress of these smaller phases of the larger org-wide defaults recalculation operation on the Background Jobs page.

### [Enable Faster Account Sharing Recalculation by Not Storing Opportunity Implicit Child Shares \(Release Update\)](#)

To improve performance, Salesforce is changing the way that automatic account sharing recalculation works behind the scenes for the Opportunity object. Implicit child share records are no longer stored between accounts and their child opportunity records. Instead, the system determines whether users can access child opportunity records when they try to access them. This release update was first available starting in Winter '24 and is enforced in Spring '24.

## Update Organization-Wide Defaults Faster

Changes to organization-wide defaults now process quicker when you have a large number of parent accounts, person accounts, or associated portal accounts. You can monitor the progress of these smaller phases of the larger org-wide defaults recalculation operation on the Background Jobs page.

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

**When:** This update is available on a rolling basis beginning in Spring '24 with the rollout completing in Summer '24.

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

SEE ALSO:

[Salesforce Help: Monitoring Background Jobs \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Organization-Wide Sharing Defaults \(can be outdated or unavailable during release preview\)](#)

## Enable Faster Account Sharing Recalculation by Not Storing Opportunity Implicit Child Shares (Release Update)

To improve performance, Salesforce is changing the way that automatic account sharing recalculation works behind the scenes for the Opportunity object. Implicit child share records are no longer stored between accounts and their child opportunity records. Instead, the system determines whether users can access child opportunity records when they try to access them. This release update was first available starting in Winter '24 and is enforced in Spring '24.

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

**When:** This update was first available in Winter '24. For production orgs created before Winter '24, this behavior is enabled on a rolling basis beginning in Spring '24. For production orgs and scratch orgs created in Winter '24 or later, this behavior is enabled by default. For sandboxes, this behavior was enabled on a rolling basis 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:** 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 improve.

**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 Opportunity Implicit Child Shares, follow the testing steps, and click **Apply Update** when your org is ready. This release update isn't visible in sandboxes and production orgs where Salesforce already enabled this behavior. The update also isn't visible in new production orgs or scratch orgs created in Winter '24 or later.

SOQL queries or Apex tests that query implicit child opportunity share records no longer return results because Salesforce no longer stores these records. For more information, see the knowledge article.

SEE ALSO:

[Knowledge Article: Faster Account Sharing Recalculation](#)

[Release Updates](#)

## Permissions

Permission set groups are available in all editions. You now receive a notification before deleting permission sets if they're assigned to users via a permission set group.

### [Use Permission Set Groups in All Editions](#)

To help you better manage your users' permissions, permission set groups are available in all editions.

### [Get Notified Before Deleting Permission Sets Assigned to Users](#)

If you try to delete a permission set included in a permission set group that's assigned to users, you now receive an error. You can only delete a permission set that isn't assigned to users either directly or through a permission set group. Previously, this action wasn't blocked, which allowed users to be assigned to empty permission set groups without enabled permissions.

### [Reference Picklists, Groups, and Queues in User Access Policies \(Beta\)](#)

You can now reference user picklist fields, groups, and queues in your policies' user criteria filters, making it easier to automate your users' assignments to package licenses, permission sets, and other access mechanisms. An improved user interface also makes creating and managing policies faster and easier. This feature continues to be available in beta in Spring '24.

## Use Permission Set Groups in All Editions

To help you better manage your users' permissions, permission set groups are available in all editions.

**Where:** This change applies to Lightning Experience and Salesforce Classic in Contact Manager, Group, Essentials, Professional, Enterprise, Performance, Unlimited, Developer, and Database.com editions.

SEE ALSO:

[Salesforce Help: Permission Set Groups \(can be outdated or unavailable during release preview\)](#)

## Get Notified Before Deleting Permission Sets Assigned to Users

If you try to delete a permission set included in a permission set group that's assigned to users, you now receive an error. You can only delete a permission set that isn't assigned to users either directly or through a permission set group. Previously, this action wasn't blocked, which allowed users to be assigned to empty permission set groups without enabled permissions.

**Where:** This change applies to Lightning Experience and Salesforce Classic in Contact Manager, Group, Essentials, Professional, Enterprise, Performance, Unlimited, Developer, and Database.com editions.


SEE ALSO:

[Salesforce Help: Manage Permission Set Assignments \(can be outdated or unavailable during release preview\)](#)

## Reference Picklists, Groups, and Queues in User Access Policies (Beta)

You can now reference user picklist fields, groups, and queues in your policies' user criteria filters, making it easier to automate your users' assignments to package licenses, permission sets, and other access mechanisms. An improved user interface also makes creating and managing policies faster and easier. This feature continues to be available in beta in Spring '24.

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

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

**How:** To enable user access policies, from Setup, in the Quick Find box, enter *User Management Settings*, and then select **User Management Settings**. Enable **User Access Policies (Beta)**. The improved user interface is enabled by default, but you can disable the Enhanced Interface for User Access Policies (Beta) setting.



To create or manage your user access policies, from Setup, in the Quick Find box, enter *User Access Policies*, and then select **User Access Policies**.

SEE ALSO:

[Salesforce Help: User Access Policies \(Beta\) \(can be outdated or unavailable during release preview\)](#)

## Globalization

Enforcement of ICU Locale formats now begins on a rolling basis. English (Italy) and three new Mayan languages are available as platform-only languages. Stay up to date with ICU locale formats.

### [Enable ICU Locale Formats \(Release Update\)](#)

To conduct business wherever you are, adopt the International Components for Unicode (ICU) locale formats. Locales control the formats for dates, times, currencies, addresses, names, and numeric values. ICU sets the international standard for these formats. The ICU locale formats provide a consistent experience across the platform and improve integration with ICU-compliant applications across the globe. When you enable this update, the ICU locale formats replace Oracle's Java Development Kit (JDK) locale formats in Salesforce. This update was first made available in Winter '20 and will be enforced on a rolling basis starting in Spring '24.

### [Present Your Custom Functionality in English \(Italy\) and Three Mayan Platform-Only Languages](#)

To help your global users use Salesforce in their language, use the platform-only English (Italy) and three Mayan languages, Chuj, Kaqchikel, and Kiche, to localize your apps, custom labels, custom objects, and field names. These platform-only languages are available everywhere you can select a language in the application. However, all standard Salesforce labels default to English. Use Translation Workbench to customize the translations for these languages.

### [Changed CustomObjectTranslation and ValueSetTranslations Behavior](#)

To retrieve either your local or packaged translation, you can now specify between the two when accessing CustomerObjectTranslation and ValueSetTranslations. When you don't specify a choice, the retrieval behavior is the same as in previous versions.

### [Evaluate the Impact of the Latest ICU Locale Updates](#)

Stay up to date with the latest locale formats from International Components for Unicode (ICU). The default currency changed for Spanish (Ecuador), Spanish (Puerto Rico), Spanish (El Salvador), and Spanish (United States). We recommend that you evaluate the changes that affect you for the locales that you use. Then test your filters, code, and components as needed.

### [Review Updated Label Translations](#)

To improve accuracy and your users' experience, we updated the translations for some standard object, tab, and field names for these languages: Arabic, Chinese (Simplified), Portuguese (Brazil), Czech, Danish, Dutch, Finnish, French, German, Greek, Hebrew, Hungarian, Italian, Japanese, Korean, Spanish, Spanish (Mexico), Norwegian, Polish, Romanian, Slovenian, Thai, Slovak, Russian, Chinese (Traditional), Turkish, Vietnamese, and Portuguese (European)

## Enable ICU Locale Formats (Release Update)

To conduct business wherever you are, adopt the International Components for Unicode (ICU) locale formats. Locales control the formats for dates, times, currencies, addresses, names, and numeric values. ICU sets the international standard for these formats. The ICU locale formats provide a consistent experience across the platform and improve integration with ICU-compliant applications across the globe. When you enable this update, the ICU locale formats replace Oracle's Java Development Kit (JDK) locale formats in Salesforce. This update was first made available in Winter '20 and will be enforced on a rolling basis starting 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 is retiring JDK locale formats and enforcing ICU locale formats on a rolling basis starting with the Spring '24 release. Salesforce orgs created in Winter '20 or later have ICU locale formats enabled by default. You can defer the enforcement until Spring '25 through the UI. Salesforce emails admins 30 to 60 days before the ICU enablement for their orgs. After the ICU locale formats are enabled, Salesforce also notifies admins of that event.

**How:** To enable this update, from Setup, in the Quick Find box, enter *Release Updates*, and then select **Release Updates**. To 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**, and save your changes.

To defer the enforcement of the ICU locale formats until Spring '25, in Setup, in the Quick Find box, enter *User Interface*, and select **User Interface**. Then deselect **Enable ICU locale formats as part of the scheduled rollout** and save your changes. This checkbox is visible only if your org uses the JDK locale formats.

SEE ALSO:

[Salesforce Help: Go Global with New International Locale Formats \(can be outdated or unavailable during release preview\)](#)

[Knowledge Article: JDK Locale Format Retirement](#)

[Trailblazer Community Group: ICU Locale Formats Adoption](#)

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To help your global users use Salesforce in their language, use the platform-only English (Italy) and three Mayan languages, Chuj, Kaqchikel, and Kiche, to localize your apps, custom labels, custom objects, and field names. These platform-only languages are available everywhere you can select a language in the application. However, all standard Salesforce labels default to English. Use Translation Workbench to customize the translations for these languages.

**Where:** This change applies to Lightning Experience, Salesforce Classic, and all versions of the mobile app in all editions except Database.com.

SEE ALSO:

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

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

## Changed CustomObjectTranslation and ValueSetTranslations Behavior

To retrieve either your local or packaged translation, you can now specify between the two when accessing CustomerObjectTranslation and ValueSetTranslations. When you don't specify a choice, the retrieval behavior is the same as in previous versions.

**Where:** This change applies to Lightning Experience, Salesforce Classic, and all versions of the mobile app in all editions.

## Evaluate the Impact of the Latest ICU Locale Updates

Stay up to date with the latest locale formats from International Components for Unicode (ICU). The default currency changed for Spanish (Ecuador), Spanish (Puerto Rico), Spanish (El Salvador), and Spanish (United States). We recommend that you evaluate the changes that affect you for the locales that you use. Then test your filters, code, and components as needed.

**Where:** This change applies to Lightning Experience, Salesforce Classic, and all versions of the mobile app in all editions except Database.com.

## Review Updated Label Translations

To improve accuracy and your users' experience, we updated the translations for some standard object, tab, and field names for these languages: Arabic, Chinese (Simplified), Portuguese (Brazil), Czech, Danish, Dutch, Finnish, French, German, Greek, Hebrew, Hungarian, Italian, Japanese, Korean, Spanish, Spanish (Mexico), Norwegian, Polish, Romanian, Slovenian, Thai, Slovak, Russian, Chinese (Traditional), Turkish, Vietnamese, and Portuguese (European)

**Where:** This change applies to Lightning Experience, Salesforce Classic, and all versions of the mobile app in all editions.

**How:** To review the changes, see [Review Spring '24 Updated Label Translations](#) and download the attached list of changes. If you want to use a different translation for tab and field labels, you can change the name back using our "Rename Tabs and Labels" functionality.

SEE ALSO:

[Salesforce Help: Rename Object, Tab, and Field Labels \(can be outdated or unavailable during release preview\)](#)

## Fields

You now see a confirmation message that reminds you to review multi-select picklist field limitations.

[IdeaExchange Delivered: Confirmation Message When You Select the Multi-Select Picklist Field Type](#)

You now see a confirmation message when you select the multi-select picklist field type when creating a custom field. The message reminds you to review the limitations of multi-select picklist fields before proceeding. We delivered this feature thanks to your ideas on IdeaExchange.

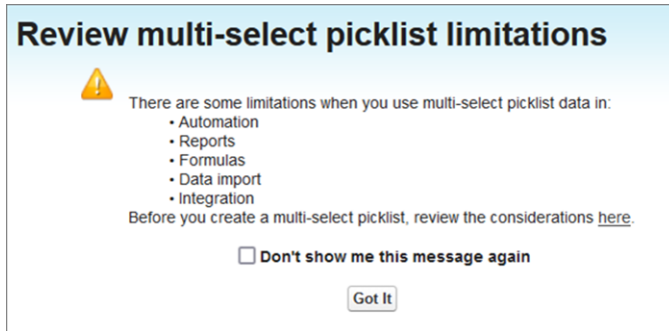


### Confirmation Message When You Select the Multi-Select Picklist Field Type

You now see a confirmation message when you select the multi-select picklist field type when creating a custom field. The message reminds you to review the limitations of multi-select picklist fields before proceeding. We delivered this feature thanks to your ideas on IdeaExchange.

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

**How:** Multi-select picklists can be useful for user interface and data standardization. However, they provide limited reporting capabilities and can be difficult to use in automation and formulas. Use multi-select picklists only in specific situations where their use maximizes their benefits. This confirmation message ensures that you're aware of potential issues when using this field type.



## SEE ALSO:

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

[IdeaExchange: Warning for Users When Creating an MSP](#)

## AppExchange

Discover solutions based on a business challenge or interest using the new Explore experience. Find what you need on the marketplace in fewer clicks using the streamlined navigation bar.

### [Explore AppExchange Solutions Based on Your Interests](#)

Find the AppExchange solutions that best match your interests using Explore, a new way to browse the marketplace. Start your exploration by choosing a general category: business need, industry, Salesforce product, corporate impact, or Salesforce Labs. Optionally, refine your exploration by choosing interests within a category, such as solutions from diverse-owned businesses. Explore handles the rest, showing you the most popular solutions for the criteria that you select.

### [Navigate AppExchange More Efficiently](#)

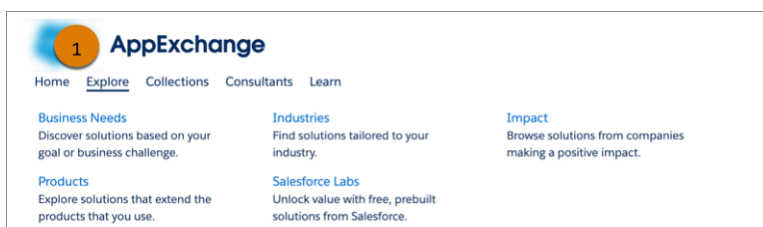
Find your way around AppExchange more efficiently from the simplified navigation bar. Discover solutions based on your business challenge or interest using AppExchange Explore, available from the new Explore tab. Browse handpicked solutions on the Collections tab, previously called Latest Collections. The Solutions by Type, Product Collections, and Industry Collections tabs are retired and removed from the navigation bar.

## Explore AppExchange Solutions Based on Your Interests

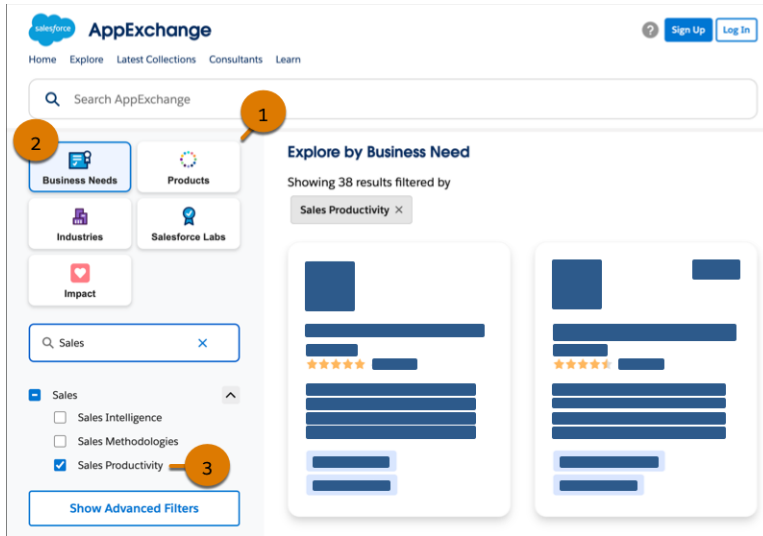
Find the AppExchange solutions that best match your interests using Explore, a new way to browse the marketplace. Start your exploration by choosing a general category: business need, industry, Salesforce product, corporate impact, or Salesforce Labs. Optionally, refine your exploration by choosing interests within a category, such as solutions from diverse-owned businesses. Explore handles the rest, showing you the most popular solutions for the criteria that you select.

**Where:** This change applies to the AppExchange website.

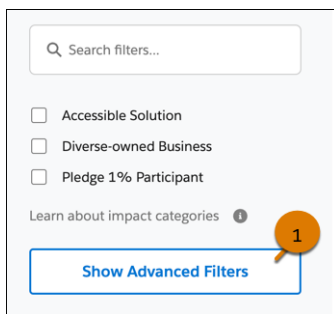
**How:** From the [AppExchange website](#), go to **Explore** (1).



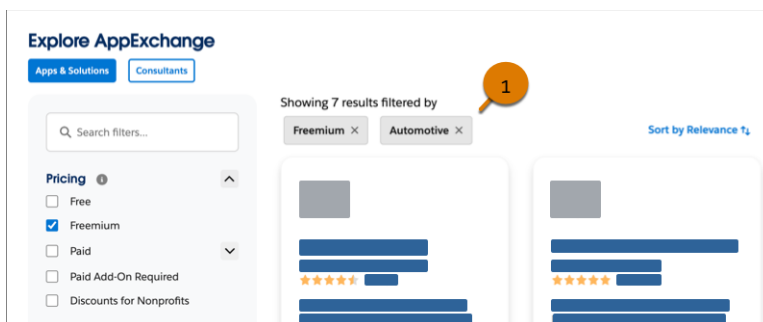
Then, choose interests from the filter panel (1). For example, to see popular solutions for improving sales productivity, go to **Business Needs** (2), and then select **Sales Productivity** (3).



To take your exploration a step further, click **Show Advanced Filters** (1).



From the advanced filter panel, choose from all of the available filter types, or combine filters across categories. For example, apply the **Freemium** and **Automotive** filters (1) to see solutions for the auto industry that offer flexible introductory pricing.



SEE ALSO:

[Navigate AppExchange More Efficiently](#)

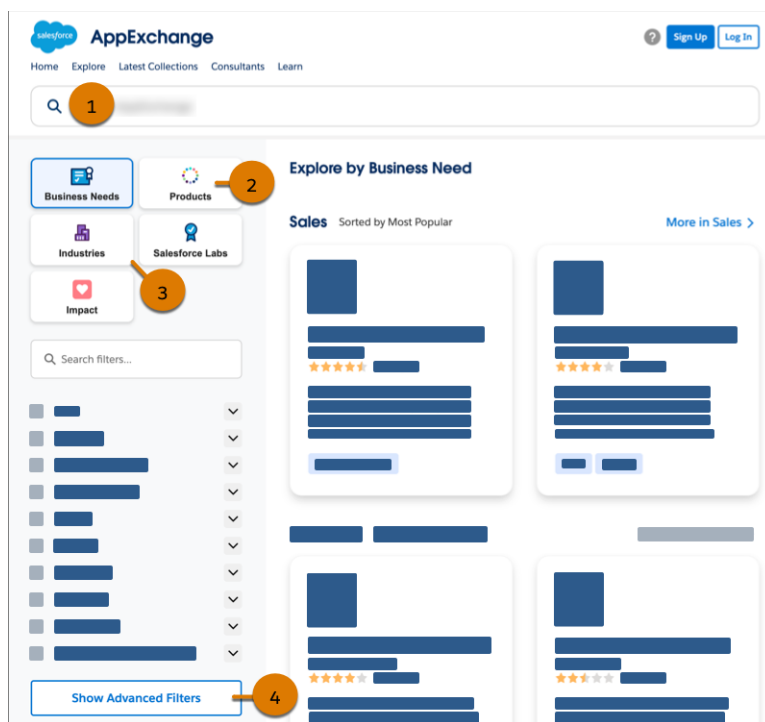
## Navigate AppExchange More Efficiently

Find your way around AppExchange more efficiently from the simplified navigation bar. Discover solutions based on your business challenge or interest using AppExchange Explore, available from the new Explore tab. Browse handpicked solutions on the Collections tab, previously called Latest Collections. The Solutions by Type, Product Collections, and Industry Collections tabs are retired and removed from the navigation bar.

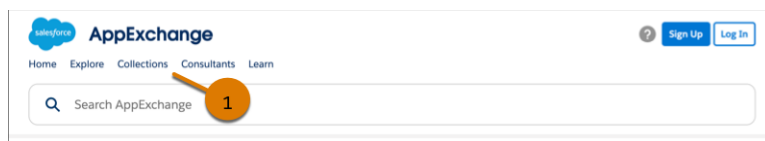
**Where:** This change applies to the AppExchange website.

**Why:** Previously, if you wanted to explore solutions by product, industry, or technology type, you navigated multiple tabs and pages. AppExchange Explore brings these areas together in a single destination. If you bookmarked a product collection, industry collection, or solution page that was retired, you're directed to a related page in AppExchange Explore.

**How:** From Explore (1), go to **Products** (2) to discover solutions for the products in your Salesforce implementation. To discover solutions tailored to your industry, go to **Industries** (3). To see solutions for specific technology types, click **Show Advanced Filters** (4), and apply a solution type filter.



To browse trending and seasonal solution collections curated by Salesforce experts, visit **Collections** (1).



SEE ALSO:

[Explore AppExchange Solutions Based on Your Interests](#)

## General Setup

Create an Apex client that can handle asynchronous callouts. Restrict a user's access to your org's list of roles when they edit list view visibility. Enhance API performance by removing updates to MRU items.

### [Get a Natural-Language Explanation of Your Formulas](#)

Einstein for Formulas can now help you provide an explanation for a formula used in Formula fields, default field values, and record validation rules. Create a new formula or use an existing formula in the Formula Editor and get an explanation generated in natural language with a single click of a button. Get more details about the formulas from an option available in the Einstein panel.

### [Handle Callbacks Asynchronously in Apex](#)

If your OpenAPI specification includes a valid callback operation, External Services generates a typesafe Apex class with callback interfaces. Create an Apex client capable of handling an asynchronous callout by using the Apex callback interface. The Apex client waits for a delayed response from an external system for up to twenty-four hours. To monitor status and system messages, use the Background Operations app or the Apex Debug log. Previously, you could call out to External Services only synchronously, where the callout waits for an HTTP response for up to two minutes and then times out.

### [Enforce View Roles and Role Hierarchy Permission When Editing Public List View Visibility \(Release Update\)](#)

With this update, only users with the View Roles and Role Hierarchy permission can see or select from your organization's list of roles when they edit public list view visibility. This update is available starting in Spring '24.

### [Remove Updates to Most Recently Used Items to Improve API Performance](#)

Automatically remove updates to MRU items based on the user to improve API performance. MRU items also impact how your search results are ranked. Salesforce recommends enabling this option only for integration users who use only APIs.

### [See Required Fields at a Glance on Dynamic Forms-Enabled Page Views](#)

When you create, edit, or clone records on Dynamic Forms-enabled pages on a desktop, a message now tells you that fields with asterisks are required.

### [Large Images No Longer Run Off the Page in Record Printable View](#)

Large images inserted into a record page using the rich text area field are now confined to the page width when you view a record in Printable View. Large images no longer extend beyond the edge of the printed view.

### [Get Improved Accessibility in List Views](#)

Learn about small but important changes that make list views more accessible.

## Get a Natural-Language Explanation of Your Formulas

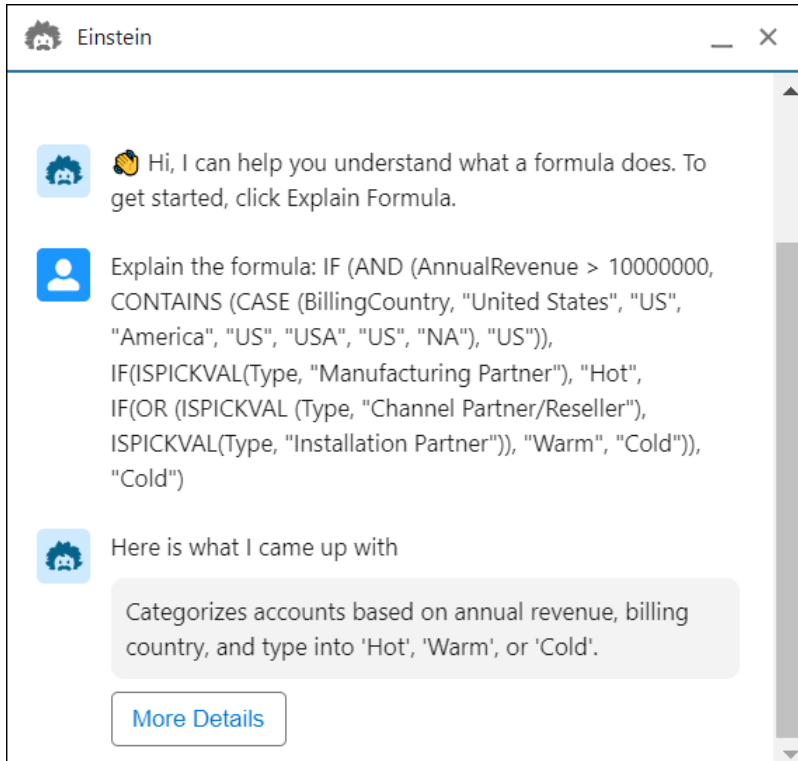
Einstein for Formulas can now help you provide an explanation for a formula used in Formula fields, default field values, and record validation rules. Create a new formula or use an existing formula in the Formula Editor and get an explanation generated in natural language with a single click of a button. Get more details about the formulas from an option available in the Einstein panel.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, and Unlimited Editions. Einstein Generative AI is available in Lightning Experience.

To use this feature, your organization must license Einstein for Formulas. Contact your Salesforce account executive for more information.

**Why:** Interpreting complex formulas requires time, especially when crafted by another admin. Einstein for Formulas simplifies this task by translating a formula into natural language.

**How:** To get an explanation for a formula entered in the Formula Editor, click **Explain Formula**. You can view the explanation generated in the Einstein panel.



## Handle Callbacks Asynchronously in Apex

If your OpenAPI specification includes a valid callback operation, External Services generates a typesafe Apex class with callback interfaces. Create an Apex client capable of handling an asynchronous callout by using the Apex callback interface. The Apex client waits for a delayed response from an external system for up to twenty-four hours. To monitor status and system messages, use the Background Operations app or the Apex Debug log. Previously, you could call out to External Services only synchronously, where the callout waits for an HTTP response for up to two minutes and then times out.

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

SEE ALSO:

[Salesforce Help: Callouts and Callbacks: Limits and Usage \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Asynchronous Callback Operations Using Apex \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Install or Create Packages \(can be outdated or unavailable during release preview\)](#)

## Enforce View Roles and Role Hierarchy Permission When Editing Public List View Visibility (Release Update)

With this update, only users with the View Roles and Role Hierarchy permission can see or select from your organization's list of roles when they edit public list view visibility. This update is available starting in 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 Winter '25. To get the major release upgrade date for your instance, go to [Trust Status](#), search for your instance, and click the maintenance tab.



**Why:** To edit public list views, a user needs the Manage Public List Views permission. After you enable this update, to make a public list view visible to specific roles, a user also needs the View Roles and Role Hierarchy permission. A user with only the Manage Public List Views permission can still edit a list view, but can only make it visible to Public Groups, or set it to fully public or private.

Previously, users with only the Manage Public List Views permission could view your organization's roles and make a list view visible to specific roles.

**How:** This update blocks users with the Manage Public List Views permission from seeing roles and role hierarchies. So that users can make list views visible to roles, grant them the View Roles and Role Hierarchy permission. Alternatively, have a user with the View Roles and Role Hierarchy permission grant access to list views.

If your organization doesn't use roles, this update has no impact.

To view this update, from Setup, in the Quick Find box, enter *Release Updates*, and then select **Release Updates**. For Enforce View Roles and Role Hierarchy Permission When Editing Public List View Visibility, follow the testing and activation steps.

SEE ALSO:

[Salesforce Help: Create a Custom List View in Salesforce Classic \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Create or Clone a List View in Lightning Experience \(can be outdated or unavailable during release preview\)](#)

[Release Updates](#)

## Remove Updates to Most Recently Used Items to Improve API Performance

Automatically remove updates to MRU items based on the user to improve API performance. MRU items also impact how your search results are ranked. Salesforce recommends enabling this option only for integration users who use only APIs.

**Where:** This change applies to all editions.

**How:** From Setup, enter *users* in the Quick Find box, and then select **Users**. Select the users who don't need MRU updates, and select **No MRU Updates**.

SEE ALSO:

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

## See Required Fields at a Glance on Dynamic Forms-Enabled Page Views

When you create, edit, or clone records on Dynamic Forms-enabled pages on a desktop, 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 if you're creating, fully editing, or cloning a record. When inline editing, the message is at the bottom right of the page.

**Edit Rose Gonzalez**

\* = Required Information

**Contact Information**

Contact Owner  
OrgFarm Epic

\* Name  
Salutation: Ms.  
First Name: Rose  
Last Name: Gonzalez

Phone: (512) 757-6000  
Home Phone:   
Mobile: (512) 757-9340  
Other Phone:   
Fax: (512) 757-9000  
Email: rose@edge.com

Account Name: Edge Communications  
Title: SVP, Procurement  
Department: Procurement

Birthdate: 8/21/1971

Buttons: Cancel, Save & New, Save

SEE ALSO:

[Salesforce Help: Break Up Your Record Details with Dynamic Forms](#) (can be outdated or unavailable during release preview)

## Large Images No Longer Run Off the Page in Record Printable View

Large images inserted into a record page using the rich text area field are now confined to the page width when you view a record in Printable View. Large images no longer extend beyond the edge of the printed view.

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

SEE ALSO:

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

## Get Improved Accessibility in List Views

Learn about small but important changes that make list views more accessible.

**Where:** These changes apply to Lightning Experience in Group, Professional, Enterprise, Performance, Unlimited, and Developer editions.

**How:** Check out details about these changes.

- The Pin List View button has a more visible keyboard focus indicator when selected.
- A user can use a keyboard to select a List View header link in a small region on a Lightning page.
- In the list view Charts panel, the button to close the panel has a clearer assistive label, which now reads “Close charts” instead of “Hide charts.” Additionally, a descriptive tooltip appears when a user moves the keyboard focus to the Close Charts button in the Charts panel, or they move it to the Close Filters button in the Filters panel.

- To provide more information to assistive technology users, the Benefits list view on the Related tab of the Benefit Type record page has an accessible label that provides the table name.
- In a list view without any items, keyboard focus follows a more logical pattern. Previously, keyboard focus sometimes moved to hidden elements.
- The records list in split view has a new infobubble that clarifies how to navigate between individual records and select them with the keyboard.
- Screen readers announce the details of errors that occur when a user saves inline edits. Additionally, the inline error window has clearer assistive text.
- A record preview icon is now present for items in related lists. With this change, keyboard users can navigate to the preview icon via the Tab key and launch the record preview.

## Data Cloud

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Ingest, harmonize, unify, and analyze streaming and batch data with Data Cloud. Then use that data to unlock meaningful and intelligent experiences across Customer 360 applications and beyond.

### [AI in Data Cloud](#)

Create your own predictive AI models, bring in predictions from models in Databricks, and connect to generative AI large language models (LLMs) from OpenAI and Azure Open AI with Einstein Studio. Use your AI models in batch transforms and flow actions.

### [Retrieve Your Customer 360 Data in Near Real Time with Data Graphs](#)

Delight your customers with rapid personalization for websites, responsive generative AI, and more by pulling pre-computed customer data from data graphs. A data graph is built from fields selected from a primary data model object (DMO) and its related objects and calculated insights. The data is serialized into a JSON blob for rapid retrieval and processing. Use data graphs where rapid response and processing are critical, such as swiftly personalizing web pages or quickly accessing a customer 360 profile in sales, service, commerce, or marketing. Using data graphs can improve the relevance of responses given by generative AI by grounding prompts to large language models.

### [Query Data Graphs for Metadata and Data Using the Data Graphs APIs](#)

You can use REST API calls to query data graphs for their primary model objects, related objects, and fields. You can also query data from a specific data graph by ID or using secondary lookup keys.

### [Experience a Streamlined Enablement for Data Cloud](#)

Starting in Spring '24, Data Cloud enters enablement as soon as it's licensed on an org. To check your org's Data Cloud enablement progress, visit the Data Cloud Setup home page. Orgs that were provisioned before Spring '24 still need to turn on Data Cloud in Data Cloud Setup by clicking **Get Started**.

### [Create Google Cloud Storage Data Streams More Easily with the New Connector](#)

You no longer need to enter the Google Cloud Storage (GCS) bucket name for each GCS data stream that you create. Use the new standardized GCS source connector to connect to GCS buckets and ingest data into Data Cloud. Your existing GCS data streams aren't affected and continue to ingest data.

### [Create SQL Queries with Query Editor](#)

With the new Query Editor feature, you can compose and execute SQL queries on Data Cloud objects. Query Editor is data space-aware and provides a powerful and flexible way to interact with data. You can also save your queries for future use.

### [Extend Data Cloud Objects to Snowflake Accounts Across AWS Regions and Public Clouds](#)

You can now connect and share data to a Snowflake account deployed in any AWS region or public cloud, such as Azure or GCP. Previously, you could share data between Data Cloud and Snowflake only if both accounts resided in the same AWS region.

### [Share Data in Near Real Time Between Data Cloud and Google BigQuery](#)

Securely share Data Cloud objects with Google BigQuery using Bring Your Own Lake (BYOL) data shares. BYOL data shares offer zero-copy integration that allows access to Salesforce data at scale. Data Cloud objects are available in Google BigQuery without moving the data.

### [Build Engaging Messaging Experiences Using WhatsApp Data in Data Cloud](#)

Ingest WhatsApp contact and tracking data from Marketing Cloud and create personalized interactions with customers. Now WhatsApp joins Email Studio, MobileConnect, and MobilePush as a standard Marketing Cloud data bundle in Data Cloud. Generate more revenue by using WhatsApp engagement data to trigger a campaign in Marketing Cloud. For example, integrate WhatsApp data with Experience Cloud site tracking and send a WhatsApp message to a customer who abandons a cart on your website.

### [Include More Complex Data in Batch Data Transforms](#)

Access multivalued data in a formula transformation. A multivalued field contains multiple values, such as a list or an array. Convert a multivalued field to a string, or merge rows into a single array in a window function.

### [Expand Date Ranges in Batch Data Transforms](#)

Insert rows that correspond with each day in a date range in a formula transformation. Use the sequence function to create an array of dates by defining the start and end values and a time interval. Use the explode function to convert an array of dates into a new column with each element in a separate row.

### [Add Streaming and Batch Data Transforms to a Data Kit](#)

Add streaming and batch data transforms from your default data space to a data kit with just clicks. Add the data kit to a package to include Data Cloud objects, metadata, and relationships and then install these elements in a subscriber org. You can then create the data transform source data streams, data mappings, transform expression, and target data lake objects from the installed data kit in any data space.

### [Add Ingestion API Data Streams to a Data Kit](#)

You can now package and deploy a data stream based on an Ingestion API connector from the default data space. After you create the data stream and add it to a data kit, add the data kit to a package. You can then install the package in a subscriber org. In the subscriber org, create a data stream in any data space from the installed data kit.

### [Create a Data Kit with More Connection Options](#)

You can now package and deploy a data stream based on an SFTP connection or a web and mobile application connector from the default data space.

### [Build Data Cloud Apps Using Second-Generation Managed Packaging](#)

You now get all the benefits of second-generation managed packaging for Data Cloud features. Salesforce partners and developers can create Data Cloud apps using a source-driven approach. You can use scratch orgs for development, retrieve data kit metadata with the CLI, share Data Cloud projects via GitHub, deploy data kit metadata, and package those features. Create multiple versions of a package and easily manage dependencies between them.

### [Add New Connectors to Ingest Data Into Data Cloud \(Beta\)](#)

Leverage a new batch of connectors to bring in data stored in databases and applications into Data Cloud to transform your data and unlock insights. Ingest data from sources such as AWS Athena, AWS RDS databases, Azure SQL Server, Azure Synapse, Databricks, Google Cloud SQL databases, HubSpot, Jira, Oracle NetSuite, SAP SuccessFactors, ServiceNow, and more.

### [Ingest Data from Kinesis Data Streams into Data Cloud with the Amazon Kinesis Connector \(Generally Available\)](#)

Use the Amazon Kinesis connector to map your Kinesis Data Streams to the Data Cloud standard data model objects to unify data across all your connected sources. This feature, which is now generally available, includes some changes since the beta release.

### [Bring PostgreSQL Database Data into Data Cloud with the Heroku PostgreSQL Connector](#)

Use the Heroku PostgreSQL connector to ingest data stored in PostgreSQL open-source relational databases into . Map the data to the standard data model objects (DMO) to unify data across all your connected sources.

### [Create S3 Data Streams More Easily with the New Amazon S3 Connector](#)

You no longer need to enter the S3 bucket credentials inline for every Amazon S3 data stream that you create. Use the new Amazon S3 Connector to perform one-time authentication, and connect to S3 buckets to ingest data into Data Cloud. Your existing S3 data streams aren't affected and continue to ingest data.

### [Package Web and Mobile Data Streams in a Data Kit](#)

Streamline package upgrades by reusing your schemas and templates. You can now package and deploy a data stream based on a web and mobile application connector from the default data space. After you create the data stream and add it to a data kit, add the data kit to a package. You can then install the package in a subscriber org and create a data stream in any data space from the installed data kit.

### [Do More with New Data Types in Data Cloud](#)

To enhance flexibility, you can now use the email, URL, phone, percent, and boolean data types in Data Cloud. These data types expand data compatibility and interoperability with external systems that interface with Data Cloud.

### [Consume Native Salesforce Data Cloud Objects in Tableau Catalog](#)

You can now view data lake objects (DLOs), data model objects (DMOs), and calculated insights in Tableau Cloud and Tableau Desktop, making Data Cloud objects easier to discover and consume in Tableau Catalog. These Data Cloud objects appear in search results, connection dialogs, external assets, and other places. Previously, all Salesforce Data Cloud objects appeared as tables rather than distinct objects.

### [Send Segments Created in Tableau Cloud to Data Cloud](#)

Enhance collaboration between Tableau data analysts and digital marketers who create segments in Data Cloud. Tableau data analysts can now create segments when leveraging the Tableau rich visual experience, and send them to Data Cloud for marketers to activate. Connect Tableau Cloud to Data Cloud to explore Data Cloud data using the Salesforce Data Cloud connector. From Tableau, select a subset of the data, create a segment, and send it to Data Cloud.

### [Reach the Right Audiences with Einstein Segment Creation](#)

Use generative AI to build targeted audience segments in Data Cloud with Einstein Segment Creation. Describe the target audience, and Einstein Segment Creation produces a segment in seconds using trusted customer data available in Data Cloud. You can also edit and fine-tune the segment as needed.

### [Fine-Tune Your Segment with New Boolean Expressions](#)

Tailor your segments further with the Has Value, Has No Value, Is True, and Is False boolean expressions. For example, create a targeted campaign for your high-engagement customers who have made in-app purchases by using the Is True boolean expression.

### [Get insights on Segment Performance with Segment Intelligence](#)

Analyze your segment data with Segment Intelligence, an in-platform intelligence tool for Data Cloud for Marketing. With a simple setup process, out-of-the-box data connectors, and pre-built visualizations, Segment Intelligence helps you optimize segments and activations across common channels, including Marketing Cloud Engagement, Google Ads, Meta Ads, and Commerce Cloud.

### [Analyze Customer Segment Data with Amazon Insights](#)

Gain a deeper understanding of the customer segments targeted by Amazon Marketing Cloud. Compare the segments to the general population in terms of demographics, affinity, and in-market behavior.

### [Activate Audiences to Google DV360](#)

Use Google DV360 as a native activation destination in Data Cloud. You can activate segments directly to Google DV360 for use in targeted advertising campaigns and insights reporting.

### [Activate Audiences to LinkedIn](#)

Use LinkedIn as a native activation destination in Data Cloud. You can activate segments directly to LinkedIn for use in targeted advertising campaigns and insights reporting.

### [Activate Audiences to SnapChat](#)

Use SnapChat as a native activation destination in Data Cloud. You can activate segments directly to SnapChat for use in targeted advertising campaigns and insights reporting.

### [Refresh Segments Incrementally for Ecosystem Partners](#)

Improve cross-channel and omnichannel journeys for your ecosystem partners by refreshing segment activations with only new, changed, and deleted members. The activation job runs at regular intervals to collect these changes.

### [Activate Segments Within Data Cloud Through the Audience DMO](#)

Enable segment activation within Data Cloud by storing the activation payload in the corresponding Audience DMO without sending it directly to an internal or external target system.

### [Manage B2C Communications Using Capping Control \(Pilot\)](#)

Set a cap on communications with B2C customers, leads, or prospects to ensure compliance with regulatory requirements, enhance the customer experience, and mitigate communication fatigue. Optimize your campaign spend budgets across lines of business by applying department-level thresholds.

### [Expand Your Reach Using the WhatsApp Channel](#)

Enhance customer engagement with personalized messages by designating WhatsApp as the contact point when activating a segment to Marketing Cloud. Connect with your audience by sending reminders, like a follow-up message when a customer abandons their cart on your website. Or, initiate conversations post-purchase to recommend similar products or suggest complementary items.

### [Create Segments with Unified Data Model Objects and Activate on Non-Unified Data Model Objects](#)

Have more control and flexibility during segmentation and activation. You're now able to segment on Unified Individual and activate on Individual, or segment on Unified Account and activate on either Account or Account Contact.

### [Connect a Data Space to an Activation Target](#)

Separate data from multiple platforms by creating an activation target specific to your data space. When you create the activation target, choose the data space to associate it with. You can select a data space for these activation targets: File Storage, External Platform, Marketing Cloud, Data Cloud Loyalty, B2C Commerce, and Marketing Cloud Personalization. Existing activations are auto-assigned to a data space based on the number of data spaces the activation target is associated with.

### [Create an Activation Target for B2C Commerce and Marketing Cloud Personalization](#)

You can now create and assign B2C Commerce and Marketing Cloud Personalization activation targets to a specific data space.

### [Apply Filters to Contact Points and the Activation Membership \(Pilot\)](#)

Pinpoint the target audience for specific campaign goals with activation membership filters. With contact point filtering, you can now apply consent filters to target contact points based on your audience preference.

### [Speed Identity Resolution with More Frequent Ruleset Processing](#)

You no longer need to wait for your daily ruleset run. Now, your rulesets run whenever your data changes. Rulesets are processed automatically as often as necessary without increasing your costs.

### [Improve Identity Resolution Match Rules with Fuzzy Matching](#)

Fuzzy matching is now available for more fields. Use fuzzy matching on any text field in your identity resolution match rules. You can use up to two fuzzy match fields other than first name in a match rule, and up to a total of six fuzzy match fields other than first name in any ruleset. We recommend using "Fuzzy Precision - High" on fields like last name, city, and account. If you're using the Exact method in existing match rules, consider updating your standard and custom match rules.

### [Match on OTT Contact Points in Identity Resolution](#)

Expand matching options by setting up match rules for OTT contact points from internet streaming messaging services such as WhatsApp or Signal.

### [Add New Object Permissions to Custom Permission Sets in Data Cloud](#)

To manage data access for future product developments, five object permissions were automatically added to the standard Data Cloud permission sets. However, if you have custom permission sets, they aren't updated automatically. You must manually add the new object permissions to any custom permission set that grants users access to data model objects. Users without these object permissions can encounter errors when accessing or working with data model objects.

### [Quickly Find Data Cloud Connect API Reference Information](#)

More easily locate and browse Salesforce Data Cloud Connect API reference documentation in the new standalone *Data Cloud Connect REST API guide*. We moved the Data Cloud Connect API topics out of the main *Connect REST API Developer Guide* and into their own guide for ease of use.

### [Control Your Data Model By Changing DMO Category](#)

In specific cases, you can now change the category of a data model object (DMO). You can change a DMO's category from Profile to Other or from Other to Profile for an object that isn't used in segmentation or activation. By reassigning categories, you have better control of your data model and the billing for your org.

### [Know the Statistics of a Data Lake Object with the New Refresh History Tab](#)

Use the new Refresh History tab to view a data lake object's (DLO) record-level statistics directly from its record home page. Get information regarding total records in the DLO, the number of records added, updated, and removed. The statistics are available for DLOs that are used by data streams or data transforms.

### [Expanded Data Cloud Availability](#)

Previously, Data Cloud couldn't be licensed on Salesforce orgs in some areas, including Singapore, Indonesia, Korea, and the United Arab Emirates. Data Cloud is now available in all geographic areas. Data Cloud is still unavailable with some licenses and environments, such as Government Cloud orgs.

### [Build Strong Data Foundations with BYOL Data Federation](#)

Use Bring Your Own Lake (BYOL) data federation to securely view and consume data from external data platforms as if it's native to Data Cloud. Data federation uses zero-copy integration to seamlessly access external data without copying it into Data Cloud. With access to trusted, governed, and customer-rich information from external data platforms, you can build rich, accurate profiles to establish a single source of truth and eliminate expensive integration processes. The release includes the general availability of BYOL data federation for Snowflake and Google BigQuery.

### [Refine Access with Data Spaces Feature Permissions](#)

Data security within Data Cloud data spaces is being enhanced and better aligned with CRM access control, enforcing security for data spaces across all access methods. This upgrade includes changes that integrate data space access control into permission sets. Now, admins can directly associate multiple data spaces to a permission set. Use new feature permissions to further restrict access to data space-aware features for each data space within the permission set.

### [Cross Cloud Updates for Data Cloud](#)

Our latest round of cross cloud features for Data Cloud.

SEE ALSO:

[Salesforce Help: Data Cloud Release Notes Changes](#)

## AI in Data Cloud

Create your own predictive AI models, bring in predictions from models in Databricks, and connect to generative AI large language models (LLMs) from OpenAI and Azure Open AI with Einstein Studio. Use your AI models in batch transforms and flow actions.

### [Build Your Own Predictive AI Models](#)

Use clicks, not code, to create AI models from scratch without leaving Salesforce. Let Einstein guide your way to AI-powered predictions in Data Cloud. For example, predict numeric measures like opportunity amount or case satisfaction score. Or predict binary outcomes such as whether you'll win or lose an opportunity or the likelihood a case will be escalated.

### [Unlock the Power of AI with Einstein Studio](#)

Einstein Studio is your home base for AI in Data Cloud. Manage the AI models that power your predictive and generative AI. Use the Einstein Studio tab to get started with AI and create or connect models. You can also use the Einstein Studio tab to see all your AI models in Data Cloud. Sort the models in the table, or use search to find a model to quickly view and access it.

### [Power Generative AI Using Third-Party LLMs](#)

Connect to generative AI power from external large language models (LLM) inside Salesforce. In Einstein Studio, you can now set up an external LLM as a foundation model to serve as a source for generative AI. For example, configure Open AI or Azure OpenAI models to summarize text or generate chat responses in Prompt Builder to accelerate tasks, reduce response time, and enhance your overall operational efficiency.

### [Drive Hyper-Personalization Using Databricks Models](#)

Connect your Databricks models with data in Data Cloud to deliver predictive intelligence and actionable insights for hyper-personalization. With Einstein Studio Bring Your Own Model (BYOM), data scientists and admins can access highly curated, harmonized, and near real-time Customer 360 data in Databricks. You can use the predictive insights to enrich customer profiles, create segments, and customize end-user experiences across touchpoints.

### [Enrich Your Batch Data Transforms Using AI Models](#)

Use AI models created in Einstein Studio to add predictive and prescriptive intelligence to a Data Cloud object using batch data transforms. Quickly evaluate your predictions across large datasets and assess models before deploying them. You can use the aggregated outputs from your data transforms to create data visualizations in Tableau, CRM Analytics, and other Salesforce apps.

### [Get Predictions from Your AI Models](#)

Use Einstein Studio prediction jobs or Flow Builder actions to consume predictions from your AI models. Activating a model enables you to consume predictions in Salesforce. The resulting actionable insights can be used to drive business intelligence.

## Build Your Own Predictive AI Models

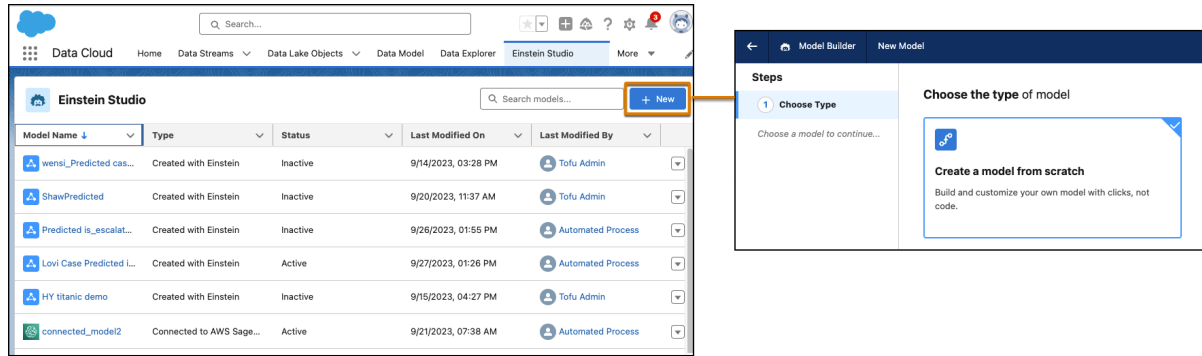
Use clicks, not code, to create AI models from scratch without leaving Salesforce. Let Einstein guide your way to AI-powered predictions in Data Cloud. For example, predict numeric measures like opportunity amount or case satisfaction score. Or predict binary outcomes such as whether you'll win or lose an opportunity or the likelihood a case will be escalated.

**Where:** This change applies to Data Cloud in Developer, Enterprise, Performance, and Unlimited editions.

**When:** This functionality is available starting in February 2024.

**How:** In Einstein Studio, click **New** and select **Create a model from scratch**.





SEE ALSO:

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

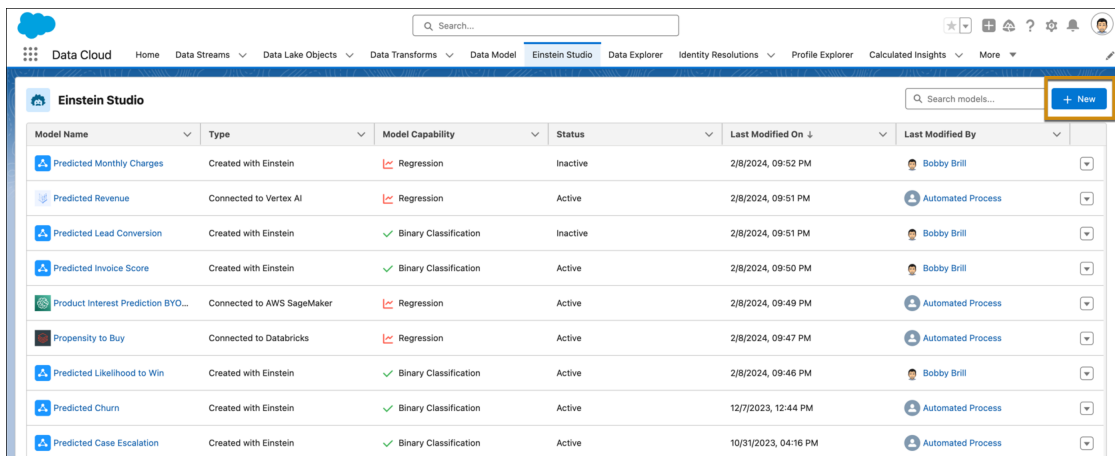
## Unlock the Power of AI with Einstein Studio

Einstein Studio is your home base for AI in Data Cloud. Manage the AI models that power your predictive and generative AI. Use the Einstein Studio tab to get started with AI and create or connect models. You can also use the Einstein Studio tab to see all your AI models in Data Cloud. Sort the models in the table, or use search to find a model to quickly view and access it.

**Where:** This change applies to Data Cloud in Developer, Enterprise, Performance, and Unlimited editions.

**When:** This functionality is available starting in Feb 2024.

**How:** To add the Einstein Studio tab to your navigation bar, click the pencil icon. Click **Add More Items** and select **Einstein Studio**.



The previous Einstein Studio tab is now named Einstein Studio (Legacy). If you have a connected model, also known as BYOM, using the old tab, for a better experience, set up your model endpoints again with the new tab.

For troubleshooting, see [Einstein Studio tab is not visible in Data Cloud](#).

SEE ALSO:

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

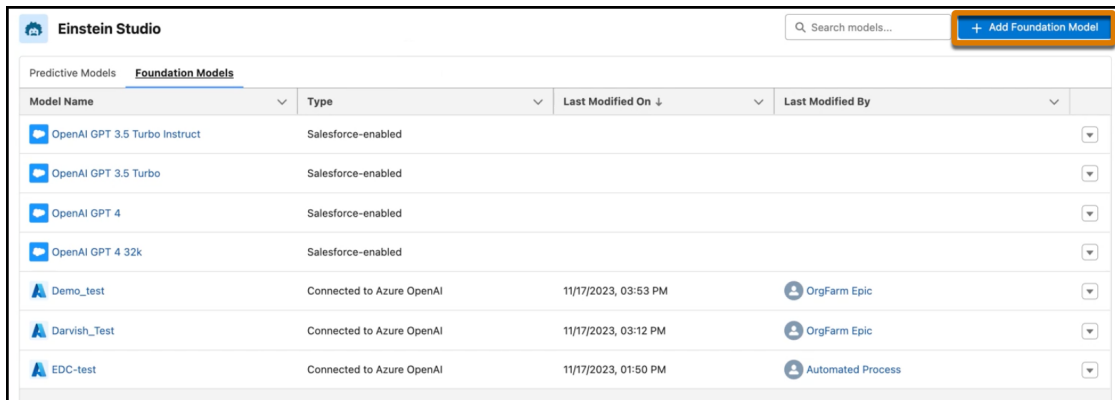
## Power Generative AI Using Third-Party LLMs

Connect to generative AI power from external large language models (LLM) inside Salesforce. In Einstein Studio, you can now set up an external LLM as a foundation model to serve as a source for generative AI. For example, configure Open AI or Azure OpenAI models to summarize text or generate chat responses in Prompt Builder to accelerate tasks, reduce response time, and enhance your overall operational efficiency.

**Where:** This change applies to Data Cloud in Developer, Enterprise, Performance, and Unlimited editions.

**When:** This functionality is available starting in February 2024.

**How:** In Einstein Studio, go to the Foundation Models tab and click **Add Foundation Model**. Enter the endpoint details, and specify a name.



The screenshot shows the Einstein Studio interface with the 'Foundation Models' tab selected. A search bar and an 'Add Foundation Model' button are visible at the top right. Below is a table listing various foundation models.

Model Name	Type	Last Modified On	Last Modified By
OpenAI GPT 3.5 Turbo Instruct	Salesforce-enabled		
OpenAI GPT 3.5 Turbo	Salesforce-enabled		
OpenAI GPT 4	Salesforce-enabled		
OpenAI GPT 4 32k	Salesforce-enabled		
Demo_test	Connected to Azure OpenAI	11/17/2023, 03:53 PM	OrgFarm Epic
Darvish_Test	Connected to Azure OpenAI	11/17/2023, 03:12 PM	OrgFarm Epic
EDC-test	Connected to Azure OpenAI	11/17/2023, 01:50 PM	Automated Process

After the foundation model is established, you can configure and test the model in Model Playground and deploy to production or use in Prompt Builder.

SEE ALSO:

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

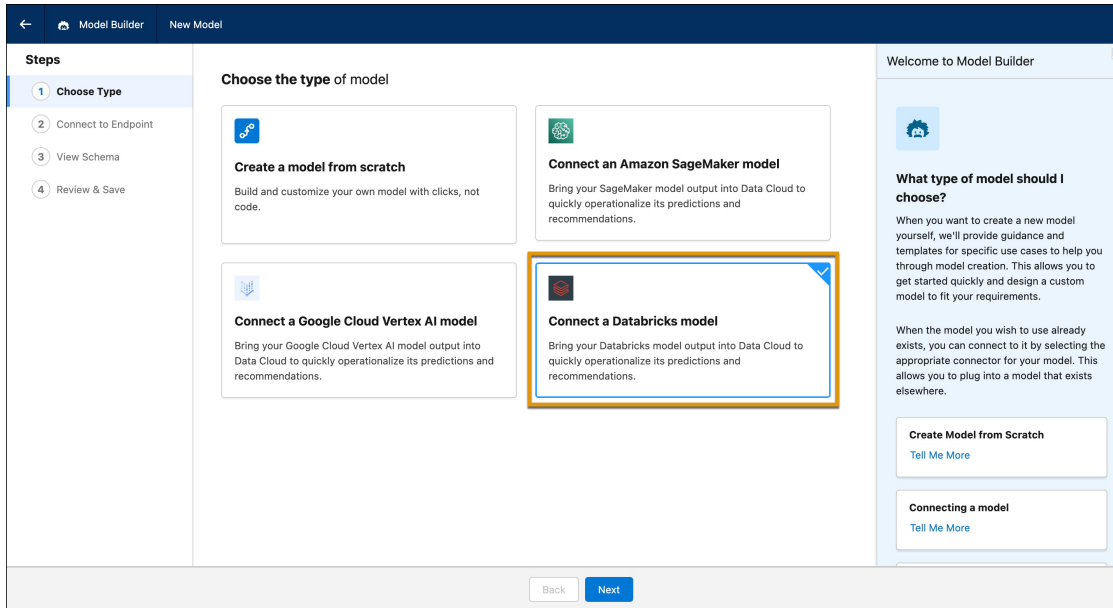
## Drive Hyper-Personalization Using Databricks Models

Connect your Databricks models with data in Data Cloud to deliver predictive intelligence and actionable insights for hyper-personalization. With Einstein Studio Bring Your Own Model (BYOM), data scientists and admins can access highly curated, harmonized, and near real-time Customer 360 data in Databricks. You can use the predictive insights to enrich customer profiles, create segments, and customize end-user experiences across touchpoints.

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

**When:** This functionality is available starting in February 2024.

**How:** To connect your model in Model Builder, click **Connect a Databricks model**.



SEE ALSO:

[Salesforce Help: Bring Your Own Models](#)

## Enrich Your Batch Data Transforms Using AI Models

Use AI models created in Einstein Studio to add predictive and prescriptive intelligence to a Data Cloud object using batch data transforms. Quickly evaluate your predictions across large datasets and assess models before deploying them. You can use the aggregated outputs from your data transforms to create data visualizations in Tableau, CRM Analytics, and other Salesforce apps.

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

**When:** This functionality is available starting in February 2024.

**How:** In Data Cloud Setup, go to Batch Data Transforms. Add your input data from a data lake object or data model object. Then on the Data Transforms canvas, map your data and add predictions to your Data Cloud object. You can then use the aggregated data in flows.

SEE ALSO:

[Salesforce Help: Batch Data Transforms](#)

## Get Predictions from Your AI Models

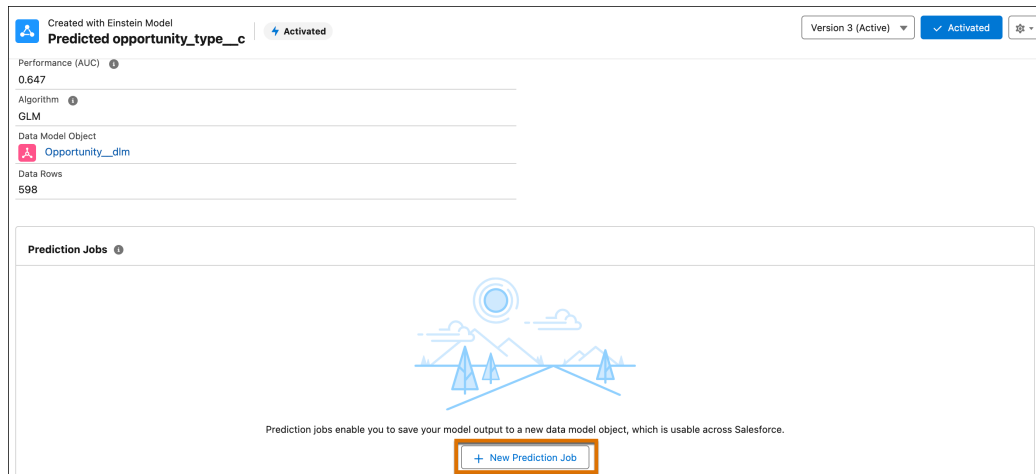
Use Einstein Studio prediction jobs or Flow Builder actions to consume predictions from your AI models. Activating a model enables you to consume predictions in Salesforce. The resulting actionable insights can be used to drive business intelligence.

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

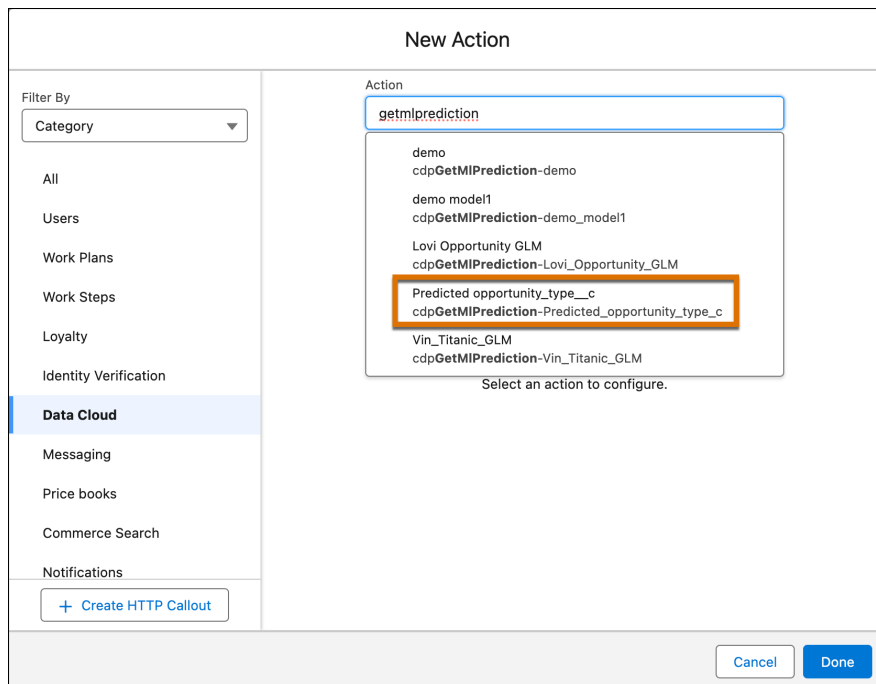
**When:** This functionality is available starting in February 2024.

**How:** You can consume predictions from AI models created in Einstein Studio in two ways.

In Setup, locate your activated model on the Einstein Studio tab. In the model details, scroll to the Prediction Jobs section. As a job runs, it scores records and saves the predictions in a Data Cloud object. Your predictions refresh when there are updates to your model input fields.



In Setup, search for and go to Flows. To invoke the model endpoint to get predictions, create a flow and select the Autolaunched Flow.



SEE ALSO:

[Use Predictions from Your AI Models in Flows](#)

## Retrieve Your Customer 360 Data in Near Real Time with Data Graphs

Delight your customers with rapid personalization for websites, responsive generative AI, and more by pulling pre-computed customer data from data graphs. A data graph is built from fields selected from a primary data model object (DMO) and its related objects and calculated insights. The data is serialized into a JSON blob for rapid retrieval and processing. Use data graphs where rapid response and processing are critical, such as swiftly personalizing web pages or quickly accessing a customer 360 profile in sales, service, commerce, or marketing. Using data graphs can improve the relevance of responses given by generative AI by grounding prompts to large language models.

**Where:** This change applies to Data Cloud in Developer, Enterprise, Performance, and Unlimited editions.

**When:** This feature is available for new Data Cloud orgs on December 13, 2023 and for existing orgs on January 4, 2024.

**How:** Create a data graph by selecting a primary DMO and one or more related DMOs or calculated insights. Data is pulled from the fields that you select in the DMOs or from the specified dimensions and measures of calculated insights. Data graphs are refreshed once in each 24-hour period.

## Query Data Graphs for Metadata and Data Using the Data Graphs APIs

You can use REST API calls to query data graphs for their primary model objects, related objects, and fields. You can also query data from a specific data graph by ID or using secondary lookup keys.

**Where:** This change applies to Data Cloud in Developer, Enterprise, Performance, and Unlimited editions.

**When:** This feature is available for new Data Cloud orgs on December 13, 2023 and for existing orgs on January 4, 2024.

**How:** Use Query API V1 to query data graphs.

SEE ALSO:

[Data Cloud Reference Guide: Query Data Graph Data](#)

## Experience a Streamlined Enablement for Data Cloud

Starting in Spring '24, Data Cloud enters enablement as soon as it's licensed on an org. To check your org's Data Cloud enablement progress, visit the Data Cloud Setup home page. Orgs that were provisioned before Spring '24 still need to turn on Data Cloud in Data Cloud Setup by clicking **Get Started**.

**Where:** This change applies to Data Cloud in Developer, Enterprise, Performance, and Unlimited editions.

**When:** This change is available in all orgs provisioned in Spring '24 and later.

## Create Google Cloud Storage Data Streams More Easily with the New Connector

You no longer need to enter the Google Cloud Storage (GCS) bucket name for each GCS data stream that you create. Use the new standardized GCS source connector to connect to GCS buckets and ingest data into Data Cloud. Your existing GCS data streams aren't affected and continue to ingest data.

**Where:** This change applies to Data Cloud in Developer, Enterprise, Performance, and Unlimited editions.

**When:** This feature is available starting March 2024.

**How:** In Data Cloud Setup, under More Connections, create a connection to a GCS bucket. Then in Data Streams, select GCS as your source.


SEE ALSO:

[Salesforce Help: Set Up a Google Cloud Storage Connection \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Create a Google Cloud Storage Data Stream \(can be outdated or unavailable during release preview\)](#)

## Create SQL Queries with Query Editor

With the new Query Editor feature, you can compose and execute SQL queries on Data Cloud objects. Query Editor is data space–aware and provides a powerful and flexible way to interact with data. You can also save your queries for future use.

 **Note:** Translated user interface labels in the localized version of the Query Editor are currently in Beta release status.

**Where:** This change applies to Data Cloud in Developer, Enterprise, Performance, and Unlimited editions with a Data Cloud license.

**When:** This feature is available starting mid-March 2024.

**How:** Create a workspace in Query Editor, select Data Cloud objects, and build and run your SQL queries.

## Extend Data Cloud Objects to Snowflake Accounts Across AWS Regions and Public Clouds

You can now connect and share data to a Snowflake account deployed in any AWS region or public cloud, such as Azure or GCP. Previously, you could share data between Data Cloud and Snowflake only if both accounts resided in the same AWS region.

**Where:** This change applies to Data Cloud in Developer, Enterprise, Performance, and Unlimited editions.

**When:** This change is being rolled out mid March 2024.

**Who:** Data Cloud customers with a Data Cloud license or CDP SKU.

**How:** Create a data share and add Data Cloud objects. Next, create a data share target to connect with a Snowflake account. Link the data share with the data share target and make the Data Cloud objects in the data share available in Snowflake as secure views.

SEE ALSO:

[Salesforce Help: Power Data-Driven Decisions with Data Shares \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Power Data-Driven Decisions with Data Shares \(can be outdated or unavailable during release preview\)](#)

## Share Data in Near Real Time Between Data Cloud and Google BigQuery

Securely share Data Cloud objects with Google BigQuery using Bring Your Own Lake (BYOL) data shares. BYOL data shares offer zero-copy integration that allows access to Salesforce data at scale. Data Cloud objects are available in Google BigQuery without moving the data.

**Where:** This change applies to Data Cloud in Developer, Enterprise, Performance, and Unlimited editions.

**When:** This capability is being rolled out mid March 2024.

**Who:** Data Cloud customers with a Data Cloud license or CDP SKU.

**How:** Create a data share and add data lake objects, data model objects, or calculated insights objects. Next, create a data share target to connect with Google BigQuery. Link the data share with the data share target and make the data share available as views in a dataset in Google BigQuery.

## Build Engaging Messaging Experiences Using WhatsApp Data in Data Cloud

Ingest WhatsApp contact and tracking data from Marketing Cloud and create personalized interactions with customers. Now WhatsApp joins Email Studio, MobileConnect, and MobilePush as a standard Marketing Cloud data bundle in Data Cloud. Generate more revenue by using WhatsApp engagement data to trigger a campaign in Marketing Cloud. For example, integrate WhatsApp data with Experience Cloud site tracking and send a WhatsApp message to a customer who abandons a cart on your website.

**Where:** This change applies to Data Cloud in Developer, Enterprise, Performance, and Unlimited editions.

**How:** When you set up the Marketing Cloud connector, select the WhatsApp data bundle and then create the corresponding data streams. WhatsApp data in Marketing Cloud is then available to your Data Cloud org and applications.

SEE ALSO:

[Salesforce Help: Marketing Cloud Starter Data Bundles in Data Cloud \(can be outdated or unavailable during release preview\)](#)

## Include More Complex Data in Batch Data Transforms

Access multivalue data in a formula transformation. A multivalue field contains multiple values, such as a list or an array. Convert a multivalue field to a string, or merge rows into a single array in a window function.

**Where:** This change applies to Data Cloud in Developer, Enterprise, Performance, and Unlimited editions.

**When:** This functionality is available starting in February 2024.

**How:** In a transform node, select **Formula**, and then select **Custom Formula**. In the formula editor panel, choose a multivalue function.

## Expand Date Ranges in Batch Data Transforms

Insert rows that correspond with each day in a date range in a formula transformation. Use the sequence function to create an array of dates by defining the start and end values and a time interval. Use the explode function to convert an array of dates into a new column with each element in a separate row.

**Where:** This change applies to Data Cloud in Developer, Enterprise, Performance, and Unlimited editions.

**When:** This functionality is available starting in April 2024.

**How:** In a transform node, select **Formula**, and then select **Custom Formula**. In the formula editor panel, from the list of multivalue functions, select **explode**. From the list of additional functions, select **sequence**.

SEE ALSO:

[Salesforce Help: Multivalue Functions for Formulas](#)

[Salesforce Help: Additional Functions for Formulas](#)

## Add Streaming and Batch Data Transforms to a Data Kit

Add streaming and batch data transforms from your default data space to a data kit with just clicks. Add the data kit to a package to include Data Cloud objects, metadata, and relationships and then install these elements in a subscriber org. You can then create the data transform source data streams, data mappings, transform expression, and target data lake objects from the installed data kit in any data space.

**Where:** This change applies to Data Cloud in Developer, Enterprise, Performance, and Unlimited editions.

**When:** This functionality is available starting in February 2024.

SEE ALSO:

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

[Salesforce Help: Publish a Data Kit \(can be outdated or unavailable during release preview\)](#)

## Add Ingestion API Data Streams to a Data Kit

You can now package and deploy a data stream based on an Ingestion API connector from the default data space. After you create the data stream and add it to a data kit, add the data kit to a package. You can then install the package in a subscriber org. In the subscriber org, create a data stream in any data space from the installed data kit.

**Where:** This change applies to Data Cloud in Developer, Enterprise, Performance, and Unlimited editions.

**When:** This functionality is available starting in February 2024.

SEE ALSO:

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

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

[Salesforce Help: Publish a Data Kit \(can be outdated or unavailable during release preview\)](#)

## Create a Data Kit with More Connection Options

You can now package and deploy a data stream based on an SFTP connection or a web and mobile application connector from the default data space.

**Where:** This change applies to Data Cloud in Developer, Enterprise, Performance, and Unlimited editions.

**When:** This change is being rolled out mid-March 2024.

SEE ALSO:

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

[Salesforce Help: Publish a Data Kit \(can be outdated or unavailable during release preview\)](#)

## Build Data Cloud Apps Using Second-Generation Managed Packaging

You now get all the benefits of second-generation managed packaging for Data Cloud features. Salesforce partners and developers can create Data Cloud apps using a source-driven approach. You can use scratch orgs for development, retrieve data kit metadata with the CLI, share Data Cloud projects via GitHub, deploy data kit metadata, and package those features. Create multiple versions of a package and easily manage dependencies between them.

**Where:** This change applies to Data Cloud in Developer, Enterprise, Performance, and Unlimited editions.

**When:** This functionality is available starting in April 2024.

**Who:** Data Cloud Second-Generation Managed Packaging is available only to Salesforce Partners.



**How:** When you package Data Cloud metadata, add it to a data kit first and then add the data kit to a package.

SEE ALSO:


[Data Cloud Developer Guide: Packages and Data Kits \(can be outdated or unavailable during release preview\)](#)

[Second-Generation Managed Packaging Developer Guide: Second-Generation Managed Packages \(can be outdated or unavailable during release preview\)](#)

## Add New Connectors to Ingest Data Into Data Cloud (Beta)

Leverage a new batch of connectors to bring in data stored in databases and applications into Data Cloud to transform your data and unlock insights. Ingest data from sources such as AWS Athena, AWS RDS databases, Azure SQL Server, Azure Synapse, Databricks, Google Cloud SQL databases, HubSpot, Jira, Oracle NetSuite, SAP SuccessFactors, ServiceNow, and more.

**Where:** This change applies to Data Cloud in Developer, Enterprise, Performance, and Unlimited editions.

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

**When:** This feature is available starting in April 2024.

**How:** In Data Cloud Setup, under More Connectors, create a connection using the new Beta connector. Then in Data Streams, select the connection as your source.

SEE ALSO:

[Salesforce Help: Enable Data Cloud Features](#)

## Ingest Data from Kinesis Data Streams into Data Cloud with the Amazon Kinesis Connector (Generally Available)

Use the Amazon Kinesis connector to map your Kinesis Data Streams to the Data Cloud standard data model objects to unify data across all your connected sources. This feature, which is now generally available, includes some changes since the beta release.

**Where:** This change applies to Data Cloud in Developer, Enterprise, Performance, and Unlimited editions.

**When:** This feature is generally available starting in April 2024.

**How:** In Data Cloud Setup, under More Connectors, create a connection using the Amazon Kinesis connector. Then in Data Streams, select the connection as your source.

SEE ALSO:

[Salesforce Help: Amazon Kinesis Connector](#)

## Bring PostgreSQL Database Data into Data Cloud with the Heroku PostgreSQL Connector

Use the Heroku PostgreSQL connector to ingest data stored in PostgreSQL open-source relational databases into . Map the data to the standard data model objects (DMO) to unify data across all your connected sources.

**Where:** This change applies to Data Cloud in Developer, Enterprise, Performance, and Unlimited editions.

**When:** This feature is available starting in May 2024.

**How:** In Data Cloud Setup, under Connectors, create a connection using the Heroku PostgreSQL connector. Then in Data Streams, select the connection as your source.

SEE ALSO:

[Salesforce Help: PostgreSQL Connectors](#)

## Create S3 Data Streams More Easily with the New Amazon S3 Connector

You no longer need to enter the S3 bucket credentials inline for every Amazon S3 data stream that you create. Use the new Amazon S3 Connector to perform one-time authentication, and connect to S3 buckets to ingest data into Data Cloud. Your existing S3 data streams aren't affected and continue to ingest data.

**Where:** This change applies to Data Cloud in Developer, Enterprise, Performance, and Unlimited editions.

**When:** This change is being rolled out mid March 2024.

**How:** In Data Cloud Setup, under More Connections, create a connection to an Amazon S3 bucket. Then in Data Streams, select Amazon S3 as your source.

SEE ALSO:

[Salesforce Help: Create Amazon S3 Data Stream in Data Cloud \(can be outdated or unavailable during release preview\)](#)

## Package Web and Mobile Data Streams in a Data Kit

Streamline package upgrades by reusing your schemas and templates. You can now package and deploy a data stream based on a web and mobile application connector from the default data space. After you create the data stream and add it to a data kit, add the data kit to a package. You can then install the package in a subscriber org and create a data stream in any data space from the installed data kit.

**Where:** This change applies to Data Cloud in Developer, Enterprise, Performance, and Unlimited editions.

**When:** This change is being rolled out in mid-April 2024.

SEE ALSO:

[Salesforce Help: Web and Mobile Application Connector](#)

[Salesforce Help: Create a Web or Mobile App Data Stream](#)

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

[Salesforce Help: Publish a Data Kit \(can be outdated or unavailable during release preview\)](#)

## Do More with New Data Types in Data Cloud

To enhance flexibility, you can now use the email, URL, phone, percent, and boolean data types in Data Cloud. These data types expand data compatibility and interoperability with external systems that interface with Data Cloud.

**Where:** This change applies to Data Cloud in Developer, Enterprise, Performance, and Unlimited editions.

**When:** This change is being rolled out in March 2024.

SEE ALSO:

[Salesforce Help: Data Types in Data Cloud \(can be outdated or unavailable during release preview\)](#)

## Consume Native Salesforce Data Cloud Objects in Tableau Catalog

You can now view data lake objects (DLOs), data model objects (DMOs), and calculated insights in Tableau Cloud and Tableau Desktop, making Data Cloud objects easier to discover and consume in Tableau Catalog. These Data Cloud objects appear in search results, connection dialogs, external assets, and other places. Previously, all Salesforce Data Cloud objects appeared as tables rather than distinct objects.

**Where:** This change applies to Tableau Cloud February 2024 and Tableau Desktop 2024.1.

**When:** This change is available in Tableau Cloud and Tableau Desktop 2024.1 starting February 2024.

## Send Segments Created in Tableau Cloud to Data Cloud

Enhance collaboration between Tableau data analysts and digital marketers who create segments in Data Cloud. Tableau data analysts can now create segments when leveraging the Tableau rich visual experience, and send them to Data Cloud for marketers to activate. Connect Tableau Cloud to Data Cloud to explore Data Cloud data using the Salesforce Data Cloud connector. From Tableau, select a subset of the data, create a segment, and send it to Data Cloud.

**Where:** This change applies to Data Cloud and Tableau Cloud when using the Salesforce Data Cloud connector for Tableau.

**When:** This change is being rolled out mid-February 2024.

## Reach the Right Audiences with Einstein Segment Creation

Use generative AI to build targeted audience segments in Data Cloud with Einstein Segment Creation. Describe the target audience, and Einstein Segment Creation produces a segment in seconds using trusted customer data available in Data Cloud. You can also edit and fine-tune the segment as needed.

**Where:** This change applies to Data Cloud in Developer, Enterprise, Performance, and Unlimited editions. Einstein generative AI is available in Lightning Experience.

**When:** This functionality is available on a rolling basis starting in Spring '24.

**How:** In Data Cloud, create a new segment and then select **Einstein Segment Creation**. In the Einstein panel, enter a description of your segment using simple text, and then review the draft and make changes as needed.

### Create Segment with Einstein

**Segment Preview**

Review the segment and its attributes and make changes if needed. You can always edit your original prompt and then regenerate the preview.

**North American Outdoor Enthusiasts** ✎ Edit Segment Rules

Count Population

**Segment Description**  
This audience segment consists of individuals residing in Canada or the United States who enjoy outdoor activities such as camping, cycling, fishing, hiking, and have a primary hobby of mountaineering, rafting, skiing, snowboarding, or surfing. They have a strong interest in sports and prefer outdoor activities such as cycling, fishing, camping, and hiking.

▼ Unified Individual

Attributes	Possible Values
<input type="checkbox"/> Residence Country Name	Is In Canada,United States
<input checked="" type="checkbox"/> Primary Hobby	Is In Camping,Cycling,Fishing,Hiking,Hunt...

▼ Preferences1

Previous Cancel Create Segment

**Einstein**

i This tool uses generative AI, which can produce inaccurate or harmful responses.

🗨️ Describe the segment you're creating using simple phrases, and then press enter to preview the segment.  
Don't enter personally identifiable data such as names, addresses, or numerical identifiers.

Create a segment of "customers who live in north american and enjoy outdoor sports"

🗨️ The drafted segment "North American Outdoor Enthusiasts" is ready. Review the segment's name, description and suggested attributes and make changes if needed. 👍 👎

Suggested Actions  
Refine Segment

SEE ALSO:

[Einstein Segments](#)

[Einstein Features](#)

## Fine-Tune Your Segment with New Boolean Expressions

Tailor your segments further with the Has Value, Has No Value, Is True, and Is False boolean expressions. For example, create a targeted campaign for your high-engagement customers who have made in-app purchases by using the Is True boolean expression.

**Where:** This change applies to Data Cloud in Developer, Enterprise, Performance, and Unlimited editions.

**When:** This feature is available starting in March 2024.

SEE ALSO:

[Salesforce Help: Expressions in Data Cloud \(can be outdated or unavailable during release preview\)](#)

## Get insights on Segment Performance with Segment Intelligence

Analyze your segment data with Segment Intelligence, an in-platform intelligence tool for Data Cloud for Marketing. With a simple setup process, out-of-the-box data connectors, and pre-built visualizations, Segment Intelligence helps you optimize segments and activations across common channels, including Marketing Cloud Engagement, Google Ads, Meta Ads, and Commerce Cloud.

**Where:** This change applies to Data Cloud in Developer, Enterprise, Performance, and Unlimited editions. Using Segment Intelligence requires a Data Cloud Starter license.

**When:** For details about timing and eligibility, contact your Salesforce account executive

**How:** To set up Segment Intelligence, go to Salesforce Setup. To view Segment Intelligence dashboards, go to Data Cloud and select the Segment Intelligence tab.

SEE ALSO:

[Salesforce Help: Segment Intelligence in Data Cloud](#)

## Analyze Customer Segment Data with Amazon Insights

Gain a deeper understanding of the customer segments targeted by Amazon Marketing Cloud. Compare the segments to the general population in terms of demographics, affinity, and in-market behavior.

**Where:** This change applies to Data Cloud in Developer, Enterprise, Performance, and Unlimited editions with Ad Audiences.

**When:** This functionality is available starting in April 2024.

## Activate Audiences to Google DV360

Use Google DV360 as a native activation destination in Data Cloud. You can activate segments directly to Google DV360 for use in targeted advertising campaigns and insights reporting.

**Where:** This change applies to Data Cloud in Developer, Enterprise, Performance, and Unlimited editions. Available with an Ad Audiences license.

**When:** This functionality is available starting in May 2024.

## Activate Audiences to LinkedIn

Use LinkedIn as a native activation destination in Data Cloud. You can activate segments directly to LinkedIn for use in targeted advertising campaigns and insights reporting.

**Where:** This change applies to Data Cloud in Developer, Enterprise, Performance, and Unlimited editions. Available with an Ad Audiences license.

**When:** This functionality is available starting in April 2024.

## Activate Audiences to SnapChat

Use SnapChat as a native activation destination in Data Cloud. You can activate segments directly to SnapChat for use in targeted advertising campaigns and insights reporting.

**Where:** This change applies to Data Cloud in Developer, Enterprise, Performance, and Unlimited editions. Available with an Ad Audiences license.

**When:** This functionality is available starting in April 2024.

## Refresh Segments Incrementally for Ecosystem Partners

Improve cross-channel and omnichannel journeys for your ecosystem partners by refreshing segment activations with only new, changed, and deleted members. The activation job runs at regular intervals to collect these changes.

**Where:** This change applies to Data Cloud in Developer, Enterprise, Performance, and Unlimited editions.

**When:** This functionality is available starting in March 2024.

SEE ALSO:

[Activation Refresh Types](#)

## Activate Segments Within Data Cloud Through the Audience DMO

Enable segment activation within Data Cloud by storing the activation payload in the corresponding Audience DMO without sending it directly to an internal or external target system.

**Where:** This change applies to Data Cloud in Developer, Enterprise, Performance, and Unlimited editions.

**When:** This functionality is available starting in March 2024.

SEE ALSO:


[Create a Data Cloud Activation Target](#)

[Create a Data Cloud Activation for a Segment](#)

## Manage B2C Communications Using Capping Control (Pilot)

Set a cap on communications with B2C customers, leads, or prospects to ensure compliance with regulatory requirements, enhance the customer experience, and mitigate communication fatigue. Optimize your campaign spend budgets across lines of business by applying department-level thresholds.

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

**When:** This functionality is available starting in March 2024.

**Who:** To participate in the pilot program, contact your account executive.

## Expand Your Reach Using the WhatsApp Channel

Enhance customer engagement with personalized messages by designating WhatsApp as the contact point when activating a segment to Marketing Cloud. Connect with your audience by sending reminders, like a follow-up message when a customer abandons their cart on your website. Or, initiate conversations post-purchase to recommend similar products or suggest complementary items.

**Where:** This change applies to Data Cloud in Developer, Enterprise, Performance, and Unlimited editions.

**When:** This functionality is available starting in April 2024.

SEE ALSO:

[Salesforce Help: Contact Points and Source Priority Order](#)

## Create Segments with Unified Data Model Objects and Activate on Non-Unified Data Model Objects

Have more control and flexibility during segmentation and activation. You're now able to segment on Unified Individual and activate on Individual, or segment on Unified Account and activate on either Account or Account Contact.

**Where:** This change applies to Data Cloud in Developer, Enterprise, Performance, and Unlimited editions.

**When:** This functionality is available starting in March 2024.

## Connect a Data Space to an Activation Target

Separate data from multiple platforms by creating an activation target specific to your data space. When you create the activation target, choose the data space to associate it with. You can select a data space for these activation targets: File Storage, External Platform, Marketing Cloud, Data Cloud Loyalty, B2C Commerce, and Marketing Cloud Personalization. Existing activations are auto-assigned to a data space based on the number of data spaces the activation target is associated with.

**Where:** This change applies to Data Cloud in Developer, Enterprise, Performance, and Unlimited editions.

**When:** This functionality is available starting in March 2024.

SEE ALSO:

[Knowledge Article: Activations Auto-Assigned to Data Spaces](#)

## Create an Activation Target for B2C Commerce and Marketing Cloud Personalization

You can now create and assign B2C Commerce and Marketing Cloud Personalization activation targets to a specific data space.


**Where:** This change applies to Data Cloud in Developer, Enterprise, Performance, and Unlimited editions.

**When:** This functionality is available starting in March 2024.

## Apply Filters to Contact Points and the Activation Membership (Pilot)

Pinpoint the target audience for specific campaign goals with activation membership filters. With contact point filtering, you can now apply consent filters to target contact points based on your audience preference.

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

**When:** This functionality is available for pilot customers starting in March 2024.

**Who:** To participate in the pilot program, contact your account owner.

## Speed Identity Resolution with More Frequent Ruleset Processing

You no longer need to wait for your daily ruleset run. Now, your rulesets run whenever your data changes. Rulesets are processed automatically as often as necessary without increasing your costs.

**Where:** This change applies to Data Cloud in Developer, Enterprise, Performance, and Unlimited editions.

**When:** This change rolls out in February 2024.

## Improve Identity Resolution Match Rules with Fuzzy Matching

Fuzzy matching is now available for more fields. Use fuzzy matching on any text field in your identity resolution match rules. You can use up to two fuzzy match fields other than first name in a match rule, and up to a total of six fuzzy match fields other than first name in any ruleset. We recommend using "Fuzzy Precision - High" on fields like last name, city, and account. If you're using the Exact method in existing match rules, consider updating your standard and custom match rules.

**Where:** This change applies to Data Cloud in Developer, Enterprise, Performance, and Unlimited editions.

**When:** This change rolls out in February 2024.

## Match on OTT Contact Points in Identity Resolution

Expand matching options by setting up match rules for OTT contact points from internet streaming messaging services such as WhatsApp or Signal.

**Where:** This change applies to Data Cloud in Developer, Enterprise, Performance, and Unlimited editions.

**When:** This change rolls out in February 2024.

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

To manage data access for future product developments, five object permissions were automatically added to the standard Data Cloud permission sets. However, if you have custom permission sets, they aren't updated automatically. You must manually add the new object permissions to any custom permission set that grants 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:** This change is being rolled out in February 2024.

**How:** Add the new object permissions to each custom permission set that controls user access to in Data Cloud.

SEE ALSO:

[Salesforce Help: Add Object Permissions to Custom Permission Sets for Data Cloud \(can be outdated or unavailable during release preview\)](#)



## Quickly Find Data Cloud Connect API Reference Information

More easily locate and browse Salesforce Data Cloud Connect API reference documentation in the new standalone *Data Cloud Connect REST API guide*. We moved the Data Cloud Connect API topics out of the main *Connect REST API Developer Guide* and into their own guide for ease of use.

SEE ALSO:

[Salesforce Developer: Salesforce Data Cloud Connect REST API Guide](#)

## Control Your Data Model By Changing DMO Category

In specific cases, you can now change the category of a data model object (DMO). You can change a DMO's category from Profile to Other or from Other to Profile for an object that isn't used in segmentation or activation. By reassigning categories, you have better control of your data model and the billing for your org.

**Where:** This change applies to Data Cloud in Developer, Enterprise, Performance, and Unlimited editions with a Data Cloud license.

**When:** This feature is available starting early April 2024.

SEE ALSO:

[Salesforce Help: Customer Data Platform Billable Usage Calculations](#)

## Know the Statistics of a Data Lake Object with the New Refresh History Tab

Use the new Refresh History tab to view a data lake object's (DLO) record-level statistics directly from its record home page. Get information regarding total records in the DLO, the number of records added, updated, and removed. The statistics are available for DLOs that are used by data streams or data transforms.

**Where:** This change applies to Data Cloud in Enterprise, Performance, and Unlimited editions.

**When:** This feature is being rolled out in May 2024.

## Expanded Data Cloud Availability

Previously, Data Cloud couldn't be licensed on Salesforce orgs in some areas, including Singapore, Indonesia, Korea, and the United Arab Emirates. Data Cloud is now available in all geographic areas. Data Cloud is still unavailable with some licenses and environments, such as Government Cloud orgs.

**Where:** This change applies to Data Cloud in Developer, Enterprise, Performance, and Unlimited editions.

**When:** Data Cloud is available everywhere starting on February 19, 2024.

SEE ALSO:

[Knowledge Article: Data Cloud: Data Center Locations](#)

## Build Strong Data Foundations with BYOL Data Federation

Use Bring Your Own Lake (BYOL) data federation to securely view and consume data from external data platforms as if it's native to Data Cloud. Data federation uses zero-copy integration to seamlessly access external data without copying it into Data Cloud. With access to trusted, governed, and customer-rich information from external data platforms, you can build rich, accurate profiles to establish a single source of truth and eliminate expensive integration processes. The release includes the general availability of BYOL data federation for Snowflake and Google BigQuery.

**Where:** This change applies to Data Cloud in Enterprise, Performance, and Unlimited editions.

**When:** This capability is being rolled out in March 2024.

SEE ALSO:

[Salesforce Help: BYOL Data Federation](#)

## Refine Access with Data Spaces Feature Permissions

Data security within Data Cloud data spaces is being enhanced and better aligned with CRM access control, enforcing security for data spaces across all access methods. This upgrade includes changes that integrate data space access control into permission sets. Now, admins can directly associate multiple data spaces to a permission set. Use new feature permissions to further restrict access to data space-aware features for each data space within the permission set.

**Where:** This change applies to Data Cloud in Developer, Enterprise, Performance, and Unlimited editions.

**When:** Data Cloud orgs began receiving new permission sets starting in December 2023. All Data Cloud orgs except orgs with Marketing Cloud Growth enabled received new permissions sets by April 20, 2024.

**How:** To prepare for enhanced security data spaces, assign new permission sets to Data Cloud users when your org gets them. Enable enhanced security data spaces after assigning new permission sets.

Permission sets for each data space are no longer created automatically when you create a data space. Instead, associate data spaces in the Data Cloud Data Space Management settings for a Data Cloud standard permission set or custom permission set. After a data space is associated with a permission set, select the data space link to access feature permissions.

Sharing is no longer supported on data space-aware feature objects.

SEE ALSO:

[Salesforce Help: Partition Your Data with Enhanced Security Data Spaces](#)

[Salesforce Help: Update Data Cloud to Enhanced Security Data Spaces](#)

[Salesforce Help: Data Cloud Permission Set Names During the Enhanced Security Migration Period](#)

## Cross Cloud Updates for Data Cloud

Our latest round of cross cloud features for Data Cloud.

New and Changed Features

- Data Cloud reports: [Analyze Calculated Insights in Data Cloud Reports](#)
- Data Cloud reports: [Tailor Reports on Data Model Objects with Custom Report Types](#)
- Data Cloud reports: [Discover Trends over Time Using Standard Fiscal Calendar Options](#)
- Data Cloud reports: [Easily Categorize Data Cloud Records with Bucket Columns](#)
- Data Cloud reports: [Perform Calculations Using Functions and Formulas](#)

- Data Cloud with Salesforce Flow: [Send Data to Data Cloud using Flows](#)
- Data Cloud with Salesforce Flow: [Debug Data Cloud-Triggered Flows](#)
- Data Cloud Enrichments: [Use a Key Qualifier for Copy Field Enrichments](#)
- Data Cloud Enrichments: [View Sync History for Copy Field Enrichments](#)
- Data Cloud Enrichments: [Create Related List Enrichments More Easily](#)
- Data Cloud Connect API: [New and Changed Connect REST API Resources](#)
- Data Cloud with Marketing Cloud Account Engagement: [Import Account Engagement Email Data into Data Cloud](#)
- New and Changed Data Model Objects (DMOs): [New and Changed Data Model Objects](#)
- Data Cloud with Einstein [Improve Your Einstein Usage with Generative AI Audit and Feedback Data](#)

## Use a Key Qualifier for Copy Field Enrichments

You can now specify a key qualifier for copy field enrichments. If you ingest data from your org into Data Cloud by using a data stream other than the CRM connector, you can identify the data stream by using a key qualifier when creating a copy field enrichment.

**Where:** This change applies to Enterprise, Performance, Unlimited, and Developer editions.

**When:** This change rolls out in December 2023.

## View Sync History for Copy Field Enrichments

Copy field enrichments now have a new Sync History tab. You can track full sync progress and access log information. You can also get information about incremental sync errors and the number of records updated.

**Where:** This change applies to Enterprise, Performance, Unlimited and Developer editions.

**How:** From the Contact or Lead object management settings, select **Data Cloud Copy Fields**, select the name of an enrichment, and then click **Sync History**.

**When:** This change rolls out in December 2023.

## Create Related List Enrichments More Easily

We've improved the work flow for creating a related list enrichment, so it's easier and gives you more control over who can see the related list data from Data Cloud.

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

**How:** From the Contact or Lead object management settings, select **Data Cloud Related Lists**, and then create a new related list.

## Deployment

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Check out what's new in deployment.

### [Salesforce Ant Migration Tool End of Life](#)

The Salesforce Ant Migration Tool is retired with Spring '24. The tool continues to function for future API versions but isn't updated with new functionality and isn't supported. To manage metadata changes, switch to Salesforce CLI for a modern, supported developer experience.

## Salesforce Ant Migration Tool End of Life

The Salesforce Ant Migration Tool is retired with Spring '24. The tool continues to function for future API versions but isn't updated with new functionality and isn't supported. To manage metadata changes, switch to Salesforce CLI for a modern, supported developer experience.

The Salesforce Ant Migration Tool is a developer tool. For developer tool policies, review [Program Terms for the Salesforce Developers Program](#).

SEE ALSO:

[Salesforce CLI Setup Guide](#)

[Salesforce CLI Command Reference: project convert mdapi](#)

## Development

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

### Lightning Components

LWC API version 60.0 provides several bug fixes and enhancements. The LWC Workspace API and `lightning-record-picker` component are generally available. Mixed shadow mode is still in beta with a minor change. Migrate your LWC projects from LWC.studio to StackBlitz. Improve accessibility with more ARIA attributes.

### Visualforce

Increase the security of your Visualforce pages by reviewing the release update that's enforced in this release.

### Apex

Use the null coalescing operator to short-circuit expressions that operate on null values. Use the new UUID class to generate a version 4 universally unique identifier (UUID). Roll back all uncommitted DML by using a savepoint and then use the new `Database.releaseSavepoint` method to explicitly release savepoints before making a desired callout. Use the methods in the new `Compression` namespace (Developer Preview) to easily generate and extract compressed zip files. Use the classes in the new `FormulaEval` namespace (Developer Preview) to evaluate user-defined formulas for Apex objects and sObjects.

### API

Secure API access with a new user profile and more control over XML deserialization. And the previously announced retirement of API versions 21.0 through 30.0 of the Salesforce Platform API is delayed until Summer '25.

### Bulk API 2.0

Query whether PK chunking is supported for an object.

### 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 is retiring on January 31, 2025. Learn about the retirement plan for Salesforce Functions.

### [AppExchange Partners](#)

The UsersWithMFA attribute will no longer be available for trial orgs in AppExchange App Analytics subscriber snapshots. Analyze subscriber activity by creating custom interactions in AppExchange App Analytics. The Cloud Security website is being retired in early February. Traffic sources in AppExchange Marketplace Analytics are updated to reflect the new Explore experience and pages that were retired from AppExchange. Marketplace Analytics is updated to reflect the Partner Co-Marketing Program's latest branding. Discover what brings customers to your listing with enhanced AppExchange lead descriptions.

### [Change Data Capture](#)

Receive change events for more objects.

### [Platform Events](#)

Find uncaught exceptions of triggers in event log files. Learn about the retirement plan for some Streaming API versions.

### [Event Bus](#)

Resume your Pub/Sub API subscriptions with managed event subscriptions (beta). Benefit from expanded regional processing for Pub/Sub API and Event Relay.

### [New and Changed Items for Developers](#)

Here is where you can find new and changed objects, calls, classes, components, commands, and more that help you customize Salesforce features.

## Lightning Components

LWC API version 60.0 provides several bug fixes and enhancements. The LWC Workspace API and `lightning-record-picker` component are generally available. Mixed shadow mode is still in beta with a minor change. Migrate your LWC projects from LWC.studio to StackBlitz. Improve accessibility with more ARIA attributes.



**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.

### [Get the Latest LWC Changes with LWC API Version 60.0](#)

API versioning on a custom component guarantees that the LWC framework behaves as it did for the Salesforce release that corresponds to the specified API version for that component. It enables us to ship bug fixes and performance improvements and to deprecate legacy features more effectively.

### [Control Workspace Tabs and Subtabs \(Generally Available\)](#)

The LWC Workspace API provides methods to manage your workspace tabs and subtabs in a Lightning console app. This feature, which is now generally available, includes minor bug fixes and improvements since the beta release.

### [Search for Records with the Lightning Record Picker Component \(Generally Available\)](#)

Use the `lightning-record-picker` component in a Salesforce application so that desktop and mobile users can quickly find and select Salesforce records. Configure the component's behavior and presentation, and enable filtering so that users can retrieve and display precisely the records that they want. This feature, now generally available, includes some changes since the last release. You can now retrieve up to 100 records. Previously, it was 50 records. The component also displays clear error messages when you configure invalid specifications and supports new attributes. This component uses the GraphQL wire adapter, which enables offline use.

### [Render Components in Native Shadow with Mixed Shadow Mode \(Beta\)](#)

Get your components ready for native shadow DOM to achieve better performance and alignment with web standards.

### [Migrate LWC Projects from LWC.studio to StackBlitz](#)

LWC.studio is discontinuing its services and shutting down the online IDE on January 1, 2024. If you have LWC projects on LWC.studio that you want to keep, move them to StackBlitz. With StackBlitz, you can start coding without any installation overheads and speed up your development with rapid prototyping. The online IDE helps you reproduce bugs and share a URL with your team quickly. StackBlitz is built on VS Code, so the interface is familiar to some users.

### [ARIA Property Reflection Available For More Attributes](#)

ARIA attributes like `aria-braillelabel` and `aria-brailledescription` are part of the Accessible Rich Internet Applications (WAI-ARIA) standard, but property reflection wasn't previously available for them on LWC.

### [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.

### [LWS Automatically Uses Closed Shadow Root Mode](#)

If a Lightning web component creates an open shadow root, LWS changes the shadow root mode to closed. Previously, LWS displayed an error message when it encountered a shadow root set to open mode. The closed mode protects the shadow root internals from JavaScript manipulation.

### [Monitor Component Events with Custom Component Instrumentation API \(Generally Available\)](#)

Add observability to your Lightning web components with Custom Component Instrumentation API. Directly monitor and track events or interactions with custom Lightning web components in your org's Event Monitoring. Previously, Event Monitoring tools tracked only insights about your application as a whole, such as records loaded and page performance. Custom Component Instrumentation API, now generally available, includes a change since the beta release. Now you can view custom component logs on the browser console. Custom Component Instrumentation API is designed for Lightning web components and isn't supported for Aura components.

### [Be Aware of Base Component lightning-input Internal DOM Structure Changes](#)

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. Ensure that your tests and styling don't rely on the previous internal structure of this component.

### [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.

### [Improved Accessibility of Base Lightning Components](#)

Salesforce continues to change base Lightning components to improve accessibility for Salesforce users.

### [Return to the Record Page with Record Create on Custom Quick Actions](#)

When creating a record from a stacked modal, you are returned to the record page on record save instead of navigating to the created record. When you work with stacked modals, such as with custom quick actions, post-save navigation isn't triggered. A stacked modal is a modal that overlays on another modal. This post-save navigation change is one of several changes included in Salesforce's migration of internal components to use Lightning Web Components.

### [Scan Documents on a Mobile Device](#)

Use the DocumentScanner API to create a Lightning web component that uses a device's camera and optical character recognition (OCR) to scan documents.

### [Interact with NFC Tags on a Mobile Device](#)

Use the NFCService API to create a Lightning web component that uses a device's native NFC functionality to read, erase, and write to NFC tags.

[New Features for the LWC Offline Test Harness](#)

Testing your offline-enabled Lightning web components gets even easier! Test Harness has simplified the Home tab by moving the developer-centric tools to the new Debug tab.

SEE ALSO:

[Lightning Web Components Developer Guide](#)

[Lightning Aura Components Developer Guide](#)

## Get the Latest LWC Changes with LWC API Version 60.0

API versioning on a custom component guarantees that the LWC framework behaves as it did for the Salesforce release that corresponds to the specified API version for that component. It enables us to ship bug fixes and performance improvements and to deprecate legacy features more effectively.


**Where:** This change applies to custom Lightning web components in Lightning Experience, Experience Builder sites, and all versions of the Salesforce mobile app.

**How:** To specify an API version, use the `apiVersion` key in the `.js-meta.xml` file for the component.

```
<?xml version="1.0" encoding="UTF-8"?>
<LightningComponentBundle xmlns="http://soap.sforce.com/2006/04/metadata">
  <apiVersion>58.0</apiVersion>
</LightningComponentBundle>
```

Setting the `apiVersion` key to 58.0 ensures that the custom component continues to behave as it did in Summer '23. However, by setting the API version to 58.0, you don't get the bug fixes and enhancements available only with LWC API version 59.0 and later.

Starting in Winter '24, all LWC API versions of 58.0 and earlier are treated as version 58.0 (Summer '23). These components continue to work based on LWC framework behavior in Summer '23.

 **Note:** To receive the latest fixes and enhancements in your component, we recommend that you upgrade your component API version one version at a time. For example, from 58.0, upgrade from 58.0 to 59.0, fix any errors or warnings you encounter, and then upgrade to 60.0.

LWC API version 60.0 corresponds to v5.0.0 in LWC open source (OSS). LWC developers who use LWC outside of the Salesforce platform are impacted by additional breaking changes. LWC API version 60.0 also includes changes from LWC OSS v4.0.0. For more information, see [LWC OSS v5.0.0](#).

LWC API version 60.0 provides several bug fixes and enhancements.

### [Empty Comment Nodes Replace Empty Text Nodes](#)

Custom components using LWC API version 60.0 and later render empty comment nodes instead of empty text nodes in features like slots in light DOM, scoped slots, and the `lwc:if` directive. We recommend that you review your test snapshots and code that rely on DOM node APIs like `childNodes` or `nextSibling`.

### [Light DOM Renders Additional Whitespace Characters](#)

Custom components using LWC API version 60.0 and later observe light DOM slots that are rendered with additional empty text nodes. We recommend that you replace code that uses the affected Web APIs.

### [Decorators Throw a Syntax Error in Non-LightningElement classes](#)

Custom components using LWC API version 60.0 and later can use decorators only in components that extend the `LightningElement` class. Remove decorators from other classes if you use them.

### Object Rest and Spread Transpilation Is Removed

LWC compiles your code using `@babel/core` and `@babel/parser`, among many other dependencies. To improve performance, custom components using LWC API version 60.0 and later now use the native rest and spread syntax instead of the Babel transpiled version. We recommend that you update your component API version to use the native syntax.

SEE ALSO:

[Lightning Web Components Developer Guide: API Versioning](#)

## Empty Comment Nodes Replace Empty Text Nodes

Custom components using LWC API version 60.0 and later render empty comment nodes instead of empty text nodes in features like slots in light DOM, scoped slots, and the `lwc:if` directive. We recommend that you review your test snapshots and code that rely on DOM node APIs like `childNodes` or `nextSibling`.

**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:** LWC implements virtual DOM nodes for features like slots in light DOM, scoped slots, and `lwc:if`. This implementation allows for insertion and removal of elements relative to the fragment, which can have sibling nodes that aren't part of the fragment. In server-side rendering (SSR), the empty text nodes are rendered using a zero-width space character, which introduced several issues during hydration. SSR is currently supported for LWC in open source only. For more information, see [LWC OSS v5.0.0](#).

**How:** In LWC API version 60.0 and later, LWC uses an empty comment node (`<!-->`) instead of an empty text node (`' '`) with the implementation of the virtual DOM nodes.

Consider this example that displays content when the `expression` variable is true.

```
<template>
  <template lwc:if={expression}>Some content here</template>
</template>
```

In LWC API version 60.0 and later, the example renders in the DOM an empty comment node before and after the content.

```
<!-->
"Some content here"
<!-->
```

In LWC API version 59.0 and earlier, the component renders the content like this.

```
"Some content here"
```

The additional empty comment nodes resolve the hydration issues and have no impact on performance or file size.

## Light DOM Renders Additional Whitespace Characters

Custom components using LWC API version 60.0 and later observe light DOM slots that are rendered with additional empty text nodes. We recommend that you replace code that uses the affected Web APIs.

**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:** Replace code that uses these affected Web APIs:

- `childNodes`
- `firstChild`
- `lastChild`



These Web APIs include all child nodes, including elements, text, and comments. For example:

```
renderedCallback() {
  const myExpectedChildNode = this.childNodes[0];
}
```

In LWC API version 59.0 and earlier, `this.childNodes[0]` included the first slotted element in the light DOM component.

In LWC API version 60.0 and later, `this.childNodes[0]` resolves to an empty text node.

We recommend that you use `lwc:ref` or `this.querySelector` instead. Alternatively, you can use these Web APIs to include element nodes only:

- [children](#)
- [firstElementChild](#)
- [lastElementChild](#)

SEE ALSO:

[Lightning Web Components Developer Guide: Access Elements the Component Owns](#)

[Lightning Web Components Developer Guide: Light DOM](#)

## Decorators Throw a Syntax Error in Non-LightningElement classes

Custom components using LWC API version 60.0 and later can use decorators only in components that extend the `LightningElement` class. Remove decorators from other classes if you use them.

**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:** Remove these decorators from non-`LightningElement` classes.

- `@api`
- `@track`
- `@wire`

For example, remove the `@track` decorator from this class.

```
// Don't do this
class MyCustomClass {
  @track myName = { firstName: '', lastName: '' };
}
```

In LWC API version 60.0 and later, this class returns a syntax error. You can use decorators only on `LightningElement` classes or those that extend `LightningElement`, such as a class that extends `LightningDatatable`.

```
// Do this instead
import { LightningElement } from 'lwc';

export default class DecoratorExample extends LightningElement {
  @track fullName = { firstName: '', lastName: '' };
}
```

In all LWC API versions, your component already throws an error if it doesn't extend `LightningElement` from `"lwc"`. However, you can create a class that extends `HTMLElement`, which is a non-`LightningElement` class, to create custom elements using `customElements.define()`.

SEE ALSO:

[Lightning Web Components Developer Guide: Public Properties](#)

[Lightning Web Components Developer Guide: Reactivity for Fields, Objects, and Arrays](#)

## Object Rest and Spread Transpilation Is Removed

LWC compiles your code using `@babel/core` and `@babel/parser`, among many other dependencies. To improve performance, custom components using LWC API version 60.0 and later now use the native rest and spread syntax instead of the Babel transpiled version. We recommend that you update your component API version to use the native syntax.

**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 LWC API version 60.0 and later, the object rest and spread syntax (`...obj`) has changed as part of a performance improvement. LWC no longer uses the Babel transpiled version and instead uses the native syntax (`...`).

If you have a counter inside of a getter and are relying on the count to report a particular number, this change can impact your code because the Babel transform behaves differently than the native behavior.

```
let count = 0;
const {
  foo: {
    bar,
    ...obj
  }
} = {
  get foo() {
    count++;
    return { bar: 42 }
  }
};
```

In this example, the `count` variable returns 2 after the Babel transform, which is a [known Babel bug](#). The variable returns 1 for the native syntax.

SEE ALSO:

[MDN Web Docs: Rest parameters](#)

[MDN Web Docs: Spread syntax](#)

## Control Workspace Tabs and Subtabs (Generally Available)

The LWC Workspace API provides methods to manage your workspace tabs and subtabs in a Lightning console app. This feature, which is now generally available, includes minor bug fixes and improvements since the beta release.

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

**How:** Import the `lightning/platformWorkspaceApi` module to access the LWC Workspace API methods, wire adapters, and event-based APIs via Lightning Message Service.

 **Note:** Lightning Web Security must be enabled in the Salesforce org because Lightning Locker doesn't support the LWC Workspace API.

These API methods for LWC are available for Lightning console apps.

- `closeTab()` —Closes a workspace tab or subtab.
- `disableTabClose()` —Prevents a workspace tab or subtab from closing.
- `focusTab()` —Focuses a workspace tab or subtab.
- `getAllTabInfo()` —Returns information about all open tabs.
- `getFocusedTabInfo()` —Returns information about the focused workspace tab or subtab.
- `getTabInfo()` —Returns information about the specified tab.
- `openSubtab()` —Opens a subtab within a workspace tab. If the subtab is already open, the subtab is focused.
- `openTab()` —Opens a new workspace tab. If the tab is already open, the tab is focused.
- `refreshTab()` —Refreshes a workspace tab or a subtab specified by the tab ID.
- `setTabHighlighted()` —Highlights the specified tab with a different background color and a badge. Tab highlights don't persist after reloading a Lightning console app.
- `setTabIcon()` —Sets the icon and alternative text of the specified tab.
- `setTabLabel()` —Sets the label of the specified tab.

These wire adapters are available for Lightning console apps.

- `EnclosingTabId()` —Returns the ID of the enclosing tab.
- `IsConsoleNavigation()` —Determines whether the app it's used within uses console navigation.

These Lightning message channels correspond to the Aura application events that are available for Lightning console apps. Their payloads are the same as the payloads for the Aura application events. Subscribe to these channels for the events that you want to listen for.

- `lightning__tabClosed`—Indicates that a tab was closed.
- `lightning__tabCreated`—Indicates that a tab was created successfully.
- `lightning__tabFocused`—Indicates that a tab was focused.
- `lightning__tabRefreshed`—Indicates that a tab was refreshed.
- `lightning__tabReplaced`—Indicates that a tab was replaced successfully.
- `lightning__tabUpdated`—Indicates that a tab was updated successfully.

 **Example:** The [lwc-recipes repo](#) contains many LWC Workspace API examples. Look for components that start with `workspaceApi`, for example, [workspaceAPICloseTab](#)

SEE ALSO:

[Salesforce Console Developer Guide](#)

## Search for Records with the Lightning Record Picker Component (Generally Available)

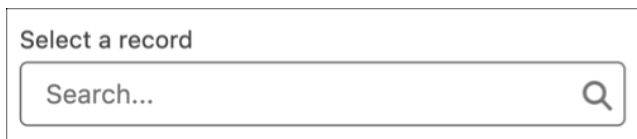
Use the `lightning-record-picker` component in a Salesforce application so that desktop and mobile users can quickly find and select Salesforce records. Configure the component's behavior and presentation, and enable filtering so that users can retrieve and display precisely the records that they want. This feature, now generally available, includes some changes since the last release. You can now retrieve up to 100 records. Previously, it was 50 records. The component also displays clear error messages when you configure invalid specifications and supports new attributes. This component uses the GraphQL wire adapter, which enables offline use.

**Where:** This feature is available for Lightning Experience in all editions.

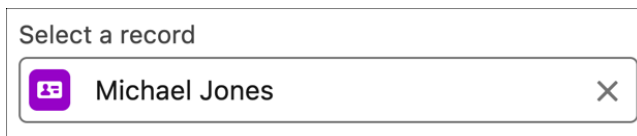
**How:** Here's an example to get started with the `lightning-record-picker` component. The component attributes provide the label for the input field, the object to search, and a callback to handle the selection of a record.

```
<lightning-record-picker
  label="Select a record"
  placeholder="Search..."
  object-api-name="Contact"
  value={initialValue}
  onchange={handleChange}
></lightning-record-picker>
```

Here's what the example looks like in the UI.



Providing a record ID to the `value` attribute makes the record picker component display a default selected record.



SEE ALSO:

[New and Changed Lightning Web Components](#)


[Component Reference: lightning-record-picker](#)

[Salesforce Developers' Blog: Introducing the Lightning Record Picker Component](#)

## Render Components in Native Shadow with Mixed Shadow Mode (Beta)

Get your components ready for native shadow DOM to achieve better performance and alignment with web standards.

**Where:** This change applies to custom Lightning web components in Lightning Experience, Experience Builder sites, 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](#).

**Why:** On the Salesforce platform, custom components render in synthetic shadow by default. Salesforce implemented synthetic shadow as a polyfill of shadow DOM to ensure a consistent experience in all browsers, including browsers that don't support native shadow. Today, most modern browsers support shadow DOM. Salesforce continues to align the framework with web standards and strives to migrate to native shadow DOM gradually via mixed shadow mode.

**How:** Use `shadowSupportMode = 'native'` to render your component in native shadow DOM.

```
export class MyComponent extends LightningElement {
  static shadowSupportMode = 'native';
}
```

Mixed shadow mode renders the component subtree in native shadow where possible. If the browser doesn't support native shadow, the component renders in synthetic shadow.

 **Note:** Previously, the mixed shadow mode developer preview introduced the `shadowSupportMode` property with the `any` value. `shadowSupportMode = 'any'` is deprecated and superseded by `shadowSupportMode = 'native'`.

To check if a component is running in native or synthetic mode, use the `this.template.synthetic` property. In native shadow, `this.template.synthetic` returns `undefined`. In synthetic shadow, `this.template.synthetic` returns `true`.

Consider these guidelines when working in mixed shadow mode.

- When you use `shadowSupportMode = 'native'`, LWC renders any shadow components that are inside of a native shadow component into native shadow mode. We recommend starting with leaf nodes when migrating your components to native shadow.
- Render a custom component in native shadow only when all the components that it contains also support native shadow. Child components that don't support native shadow can exhibit broken styling or functionality. If a custom component contains base Lightning components, don't set `shadowSupportMode = 'native'`. Salesforce has started preparing base Lightning components to use native shadow, but they aren't supported for native shadow usage yet.

Migrating from synthetic to native shadow DOM can lead to some challenges along the way. We recommend that you review these links for best practices that help with the migration process.

SEE ALSO:

[Salesforce Developers' Blog: Get your LWC components ready for native shadow DOM in Spring '24](#)

[Lightning Web Components Developer Guide: Build Components in Mixed Shadow Mode](#)


[Be Aware of Base Lightning Component Internal DOM Structure Changes for Future Native Shadow Support](#)

## Migrate LWC Projects from LWC.studio to StackBlitz

LWC.studio is discontinuing its services and shutting down the online IDE on January 1, 2024. If you have LWC projects on LWC.studio that you want to keep, move them to StackBlitz. With StackBlitz, you can start coding without any installation overheads and speed up your development with rapid prototyping. The online IDE helps you reproduce bugs and share a URL with your team quickly. StackBlitz is built on VS Code, so the interface is familiar to some users.

**How:** To get started, go to <https://playground.lwc.dev>. The default project includes a parent component `x-app` and a child component `x-counter`, where `x` is the namespace.

StackBlitz projects don't include Lightning Design System styling and base components. StackBlitz provides both Salesforce platform and LWC open source features. It doesn't have access to your Salesforce data. For example, it doesn't support `@salesforce/*` imports and Lightning Data Service wire adapters.

 **Note:** StackBlitz is a third-party product and is subject to additional terms and conditions, such as its own terms of service or privacy policies. Salesforce isn't responsible for the content, services, or paid options offered by StackBlitz.

SEE ALSO:

[Lightning Web Components Developer Guide: Get Started Coding](#)

[StackBlitz Docs: Getting Started](#)

## ARIA Property Reflection Available For More Attributes

ARIA attributes like `aria-braillelabel` and `aria-brailledescription` are part of the Accessible Rich Internet Applications (WAI-ARIA) standard, but property reflection wasn't previously available for them on LWC.

**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:** ARIA property reflection is now available on these attributes:

- `aria-colindextext`—Defines a human-readable text alternative of the numeric `aria-colindex`.
- `aria-rowindextext`—Defines a human-readable text alternative of the numeric `aria-rowindex`.
- `aria-description`—Describes the current element.
- `aria-braillelabel`—Defines a string value for the current element, which is intended for Braille conversion.
- `aria-brailledescription`—Defines a human-readable, author-localized abbreviated description for the role of an element, which is intended for Braille conversion.

Follow the [WAI-ARIA standard](#) when implementing accessibility in your components.

With property reflection, you can define these ARIA properties in a component and customize its getter and setter behavior. For example:

```
import { LightningElement } from 'lwc';

export default class extends LightningElement {
  get ariaBrailleLabel() {
    return this._ariaBrailleLabel
  }

  set ariaBrailleLabel(val) {
    console.log('I am in the setter!')
    this._ariaBrailleLabel = val
  }
}
```

Additionally, you can call `this.aria*` in a component using a property getter and setter. If the browser doesn't support the ARIA reflection, calling `this.ariaBraille*`, such as `this.ariaBrailleLabel`, returns undefined. Currently, Safari and Firefox don't support property reflection for `ariaBraille*` properties.

SEE ALSO:

[MDN web docs: ARIA states and properties](#)

## 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.

**How:** These APIs have new distortions documented in the [LWS Distortion Viewer](#). Corresponding ESLint rules are included in the ESLint package.

- `Selection.prototype.collapse`
- `Selection.prototype.extend`
- `Selection.prototype.selectAllChildren`
- `Selection.prototype.setBaseAndExtent`
- `Selection.prototype.setPosition` event

This distortion was changed.

- `Document.prototype.execCommand`

These distortions and associated ESLint rules were removed.

- `Element.prototype.attributes` getter
- `HTMLIFrameElement.prototype.allowPaymentRequest`
- `HTMLIFrameElement.prototype.csp`
- `HTMLIFrameElement.prototype.featurePolicy`
- `HTMLIFrameElement.prototype.referrerPolicy`

## LWS Automatically Uses Closed Shadow Root Mode

If a Lightning web component creates an open shadow root, LWS changes the shadow root mode to closed. Previously, LWS displayed an error message when it encountered a shadow root set to open mode. The closed mode protects the shadow root internals from JavaScript manipulation.

**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.

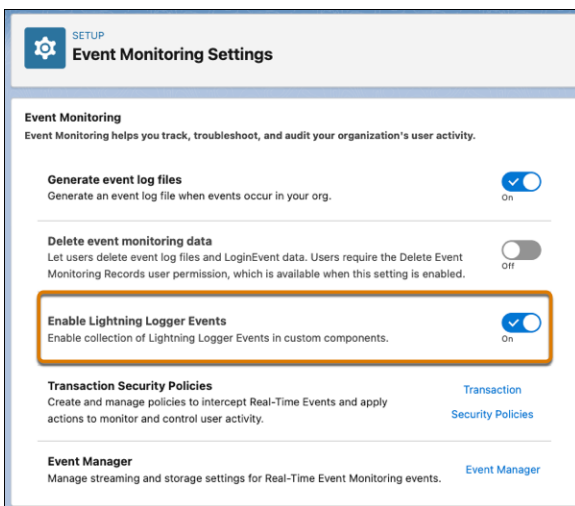
## Monitor Component Events with Custom Component Instrumentation API (Generally Available)

Add observability to your Lightning web components with Custom Component Instrumentation API. Directly monitor and track events or interactions with custom Lightning web components in your org's Event Monitoring. Previously, Event Monitoring tools tracked only insights about your application as a whole, such as records loaded and page performance. Custom Component Instrumentation API, now generally available, includes a change since the beta release. Now you can view custom component logs on the browser console. Custom Component Instrumentation API is designed for Lightning web components and isn't supported for Aura components.

**Where:** This change applies to Lightning Experience 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:** From Setup, in the Quick Find box, enter `event`, and then select **Event Monitoring Settings**. Turn on Lightning Logger Events.



Next, import `log` from the `lightning/logger` module in your component and log data messages to Event Monitoring. The `log()` function publishes data to a new `EventLogFile` event type called `Lightning Logger Event` that structures the event data for use in Event Monitoring.

```
<!-- myComponent.html -->
<template>
  <lightning-button label="Approve"
    onclick={handleClick}>
  </lightning-button>
</template>

// myComponent.js
import { LightningElement } from 'lwc';
import { log } from 'lightning/logger';

export default class MyComponent extends LightningElement {

  handleClick() {
    let msg = {
      type: 'click',
      action: 'Approve'
    }
    log(msg);
  }
}
```

SEE ALSO:

[Component Library: lightning/logger](#)

[Object Reference for the Salesforce Platform: Lightning Logger Event Type](#)

## Be Aware of Base Component `lightning-input` Internal DOM Structure Changes

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. 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.

**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](#)). Since the Spring '23 release, 33 components have been 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 Spring '24, in addition to other components, the internal structure of the `lightning-input` component changed to prepare for native shadow DOM.

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 \(Developer Preview\)](#).

## 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 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](#)). Since the Spring '23 release, 33 components have been adapted to prepare for native shadow DOM, as we announced in [the Summer '23 release notes](#)

In Spring '24, these additional components have been adapted to prepare for native shadow DOM.

- `lightning-alert`
- `lightning-badge`
- `lightning-button-group`
- `lightning-confirm`
- `lightning-formatted-address`
- `lightning-formatted-date-time`
- `lightning-formatted-email`
- `lightning-formatted-location`
- `lightning-formatted-phone`
- `lightning-formatted-rich-text`
- `lightning-formatted-text`
- `lightning-formatted-time`
- `lightning-formatted-url`
- `lightning-input-address`
- `lightning-input-name`
- `lightning-input-location`
- `lightning-input-rich-text`
- `lightning-layout`
- `lightning-layout-item`
- `lightning-menu-subheader`
- `lightning-modal`
- `lightning-modal-body`
- `lightning-modal-footer`
- `lightning-modal-header`
- `lightning-prompt`

- `lightning-rich-text-toolbar-button`
- `lightning-rich-text-toolbar-button-group`
- `lightning-toast`
- `lightning-toast-container`

Salesforce [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. 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 [Style Components with Lightning Design System](#) in the *Lightning Web Components Developer Guide*.

## Improved Accessibility of Base Lightning Components

Salesforce continues to change base Lightning components to improve accessibility for Salesforce users.

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

**Why:** The [Web Content Accessibility Guidelines \(WCAG\)](#) were created to allow for greater accessibility and usability of technology by individuals with disabilities. We strive for conformance with [WCAG 2.1 level AA](#), which aligns to these standards.

Salesforce works continuously to align the base Lightning components with accessibility standards. For descriptions of recent component changes, see [New and Changed Lightning Web Components](#) on page 264.

SEE ALSO:

[Salesforce Legal: Product Accessibility Status](#)

[Object Reference for the Salesforce Platform: Lightning Logger Event Type](#)

## Return to the Record Page with Record Create on Custom Quick Actions

When creating a record from a stacked modal, you are returned to the record page on record save instead of navigating to the created record. When you work with stacked modals, such as with custom quick actions, post-save navigation isn't triggered. A stacked modal is a modal that overlays on another modal. This post-save navigation change is one of several changes included in Salesforce's migration of internal components to use Lightning Web Components.

**Where:** This change applies to custom Lightning components in Lightning Experience, Experience Builder sites, and all versions of the Salesforce mobile app.

**When:** This change is applied on a rolling basis starting in Spring '24. The rollout is expected to end in June 2024.

**How:** Post-save navigation no longer occurs with this change. On record save, you're redirected back to the record page that triggered the quick action. Previously, when you created a record via a stacked modal from a custom quick action, you were redirected to the newly created record page. For example, firing the `force:createRecord` event from an Aura component that's embedded in a screen flow via a quick action results in a stacked modal that displays a create record page. When creating the record, you were redirected to the newly created record.

To use post-save navigation for custom Aura components, you can close the previously opened modal before firing the `force:createRecord` event. Alternatively, use the `lightning:navigation` component for navigation so that you can control post-save navigation behavior using the `replace` property.

```
<aura:component
implements="force:hasRecordId,force:lightningQuickAction,lightning:availableForFlowScreens"
```

```

>
<aura:handler name="init" value="{!this}" action="{!c.doInit}"/>
<aura:attribute name="pageReference" type="Object"/>
<aura:attribute name="url" type="String"/>
<lightning:pageReferenceUtils aura:id="pageRefUtils"/>
<lightning:navigation aura:id="navService"/>

<lightning:button onclick="{!c.handleClick}" label="Create Contact"/>
</aura:component>

```

To use post-save navigation on record save, specify `navService.navigate(pageRef, true)`; where the `replace` property is `true`.

```

({
  doInit : function(component,event,helper){
    var navService = component.find("navService");
    // Specify the contact create page
    var pageRef = {
      type: "standard__objectPage",
      attributes: {
        objectApiName: "Contact",
        actionName: "new"
      },
      state: {
        }
    }
    // Replace with your own field values
    var defaultFieldValues = {
      LastName: "Last Name",
    };
    pageRef.state.defaultFieldValues =
component.find("pageRefUtils").encodeDefaultFieldValues(defaultFieldValues);
    component.set("v.pageReference", pageRef);

    // Generate a Link for the Aura Link example
    navService.generateUrl(pageRef)
    .then($A.getCallback(function(url) {
      component.set("v.url", url ? url : defaultUrl);
    }), $A.getCallback(function(error) {
      component.set("v.url", defaultUrl);
    }));

  },
  handleClick : function (component, event, helper) {
    var navService = component.find("navService");
    var pageRef = component.get("v.pageReference");
    event.preventDefault();
    navService.navigate(pageRef,true); // replace is true
  },
});

```

For custom Lightning web components, with the `lightning/navigation` module, you can control post-save navigation behavior using the `replace` property.

-  **Note:** In custom and standard quick actions, creating a record from a lookup field returns you to the previously stacked modal. For more information, see [Create From Lookup Changes](#).

SEE ALSO:

[Lightning Aura Components Developer Guide: Navigate to a Record Create Page with Default Field Values](#)

[Lightning Web Components Developer Guide: Quick Action Navigation](#)


[New and Changed Modules for Lightning Web Components](#)

[New and Changed Aura Components](#)

## Scan Documents on a Mobile Device

Use the DocumentScanner API to create a Lightning web component that uses a device's camera and optical character recognition (OCR) to scan documents.

**Where:** This change applies to the Salesforce Mobile and Field Service Mobile apps.

-  **Note:** Using the DocumentScanner API to create document scanning based features works only in the mobile app, and not on mobile or desktop web.

**How:** Using DocumentScanner in your Lightning web component is straightforward.

1. Import DocumentScanner into your component definition to make the DocumentScanner API functions available to your code.
2. Test to make sure DocumentScanner is available before you call the `scan ()` function.
3. Use the `scan ()` function to begin a document scanning session.
4. Process the scan results.

For more details, see [Scan Documents on a Mobile Device](#) in the *Mobile and Offline Developer Guide* (can be outdated or unavailable during release preview).

## Interact with NFC Tags on a Mobile Device

Use the NFCService API to create a Lightning web component that uses a device's native NFC functionality to read, erase, and write to NFC tags.

**Where:** This change applies to the Salesforce Mobile and Field Service Mobile apps.

-  **Note:** Using the NFCService API to create NFC-based features works only in the mobile app, and not on mobile or desktop web.

**How:** Using NFCService in your Lightning web component is straightforward.

1. Import NFCService into your component definition to make the NFCService API functions available to your code.
2. Test to make sure NFCService is available before you call NFC-related functions.
3. Use the feature functions to perform NFC-related operations.

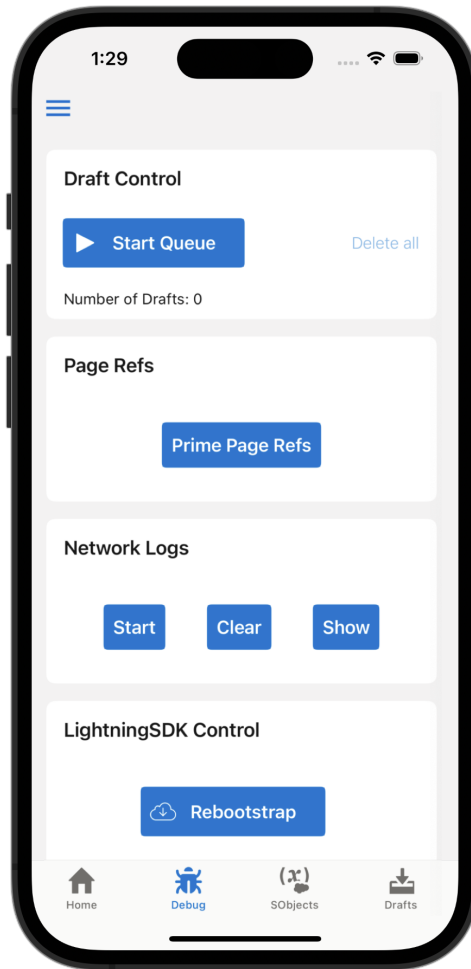
For more details, see [Interact with NFC Tags on a Mobile Device](#) in the *Mobile and Offline Developer Guide* (can be outdated or unavailable during release preview).

## New Features for the LWC Offline Test Harness

Testing your offline-enabled Lightning web components gets even easier! Test Harness has simplified the Home tab by moving the developer-centric tools to the new Debug tab.

**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 the Test Harness during offline component development, see [Develop Offline-Ready LWCs with the LWC Offline Test Harness](#) in the Mobile Offline Developer Guide.

## Visualforce

Increase the security of your Visualforce pages by reviewing the release update that's enforced in this release.

For more information on features affected by this enhancement, refer to the [Visualforce Developer Guide](#).

### [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 is enforced in Spring '24.

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

The Visualforce Remoting API uses JavaScript to directly call methods in Apex controllers from Visualforce pages. To prevent unauthorized serialization and deserialization across packaging namespaces, this update validates the `JsonAccess` annotation of your Apex classes. This update was first made available in Winter '23 and is enforced in Spring '24.

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

**When:** This 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 then click the maintenance tab.

**How:** To review 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](#)

## Apex

Use the null coalescing operator to short-circuit expressions that operate on null values. Use the new `UUID` class to generate a version 4 universally unique identifier (UUID). Roll back all uncommitted DML by using a savepoint and then use the new `Database.releaseSavepoint` method to explicitly release savepoints before making a desired callout. Use the methods in the new `Compression` namespace (Developer Preview) to easily generate and extract compressed zip files. Use the classes in the new `FormulaEval` namespace (Developer Preview) to evaluate user-defined formulas for Apex objects and `sObjects`.

For more information on these enhancements, see the [Apex Developer Guide](#) and the [Apex Reference Guide](#).

### [IdeaExchange Delivered: Use the Null Coalescing Operator](#)

The `??` operator returns the left-hand argument if the left-hand argument isn't null. Otherwise, it returns the right-hand argument. Similar to the safe navigation operator (`?.`), the null coalescing operator (`??`) replaces verbose and explicit checks for null references in code. We delivered this feature thanks to your ideas on IdeaExchange.

### [IdeaExchange Delivered: Get Support for Randomly Generated UUID v4](#)

Use the new `UUID` class to generate a version 4 universally unique identifier (UUID). The UUID is generated using a cryptographically strong pseudo-random number generator and is represented as 32 hexadecimal values. We delivered this feature thanks to your ideas on IdeaExchange.

### [IdeaExchange Delivered: Make Callouts After Rolling Back DML and Releasing Savepoints](#)

Roll back all uncommitted DML by using a savepoint. Then use the new `Database.releaseSavepoint` method to explicitly release savepoints before making a desired callout. Previously, callouts after creating savepoints resulted in a `CalloutException` regardless of whether there was uncommitted DML or the changes were rolled back to a savepoint. We delivered this feature thanks to your ideas on IdeaExchange.

### [IdeaExchange Delivered: Compress and Extract Zip Files in Apex \(Developer Preview\)](#)

Use the methods in the new `Compression` namespace to easily generate and extract compressed zip files. To optimize compression, you can specify the compression method and level. You can compress multiple attachments or documents as an Apex blob that contains the zip archive. You can also specify the data to extract from the zip archive without uncompressing the entire zip archive. We partially delivered this feature thanks to your ideas on IdeaExchange.

[IdeaExchange Delivered: Evaluate Dynamic Formulas in Apex \(Developer Preview\)](#)

Evaluate user-defined formulas for Apex objects and sObjects by using the classes in the new `FormulaEval` namespace. With this feature, avoid unnecessary DML statements to recalculate formula field values or evaluate dynamic formula expressions. We partially delivered this feature thanks to your ideas on IdeaExchange.

[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. This update was available starting in Spring '23 and is enforced in Spring '24.

[See Improved Logging When FOR UPDATE Locks Are Released](#)

Record locks that are obtained in Apex using `FOR UPDATE` are automatically released when making callouts. The information is now logged in the debug log and the logged message includes the most recently locked entity type. For example:

```
FOR_UPDATE_LOCKS_RELEASE FOR UPDATE locks released due to a callout. The most recent lock was Account.
```

[Changed Behavior with Type.forName Method](#)

Using an invalid namespace while calling the `Type.forName()` method now returns null. Previously, Apex allowed you to specify an invalid namespace such as `Type.forName('InvalidNamespace', 'OuterClass.InnerClass')` or use an outer class as a namespace such as `Type.forName('OuterClass', 'InnerClass')` with indeterminate results.

[Improved Validation and Limit Accounting with DML on External Objects](#)

Starting Spring '24, only external objects can use the DML methods such as `Database.insertImmediate()` and `Database.insertAsync()`. A catchable `TypeException` is thrown if object types other than external or big objects are used in the lists of arguments to these DML methods. Further, these DML operations no longer increment DML statement and record limits. Previously, there was no validation to ensure that external and non-external objects weren't mixed in the arguments to these DML calls.

[New Default Quiddity Enum Value](#)

A quiddity value of undefined (UD) is the new default when an event hasn't been assigned a more descriptive quiddity. Previously, the default was Synchronous Uncategorized (R).

[Provide Data to Einstein with Invocable Actions](#)

Now you can create an invocable action in Apex that integrates with a prompt template in Prompt Builder. The invocable action performs dynamic logic and actions to generate output text that's merged into the associated prompt template's resolution.

## SEE ALSO:

[Apex: New and Changed Items](#)



## Use the Null Coalescing Operator

The `??` operator returns the left-hand argument if the left-hand argument isn't null. Otherwise, it returns the right-hand argument. Similar to the safe navigation operator (`?.`), the null coalescing operator (`??`) replaces verbose and explicit checks for null references in code. We delivered this feature thanks to your ideas on IdeaExchange.

**Where:** This change applies to all editions.

**How:** The null coalescing operator is a binary operator in the form `a ?? b` that returns `a` if `a` isn't null, and otherwise returns `b`. The operator is left-associative. The left-hand operand is evaluated only one time. The right-hand operand is only evaluated if the left-hand operand is null.

You must ensure type compatibility between the operands. For example, in the expression: `objectZ result = objectA ?? objectB`, both `objectA` and `objectB` must be instances of `objectZ` to avoid a compile-time error.

Here's a comparison that illustrates the operator usage. Before the Null Coalescing Operator, you used:

```
Integer notNullReturnValue = (anInteger != null) ? anInteger : 100;
```

With the Null Coalescing Operator, use:

```
Integer notNullReturnValue = anInteger ?? 100;
```

While using the null coalescing operator, always keep operator precedence in mind. In some cases, using parentheses is necessary to obtain the desired results. For example, the expression `top ?? 100 - bottom ?? 0` evaluates to `top ?? (100 - bottom ?? 0)` and not to `(top ?? 100) - (bottom ?? 0)`.

Apex supports assignment of a single resultant record from a SOQL query, but throws an exception if there are no rows returned by the query. The null coalescing operator can be used to gracefully deal with the case where the query doesn't return any rows. If a SOQL query is used as the left-hand operand of the operator and rows are returned, then the null coalescing operator returns the query results. If no rows are returned, the null coalescing operator returns the right-hand operand.

These examples use the null coalescing operator.

```
Account defaultAccount = new Account(name = 'Acme');
// Left operand SOQL is empty, return defaultAccount from right operand:
Account a = [SELECT Id FROM Account
  WHERE Id = '001000000FAKEID'] ?? defaultAccount;
Assert.areEqual(defaultAccount, a);
```

```
// If there isn't a matching Account or the Billing City is null, replace the value
string city = [Select BillingCity
  From Account
  Where Id = '001xx000000001oAAA']?.BillingCity;
System.debug('Matches count: ' + (city?.countMatches('San Francisco') ?? 0) );
```

There are some restrictions on using the null coalescing operator.

- You can't use the null coalescing operator as the left side of an assignment operator in an assignment. `foo??bar = 42;` // This is not a valid assignment
- SOQL bind expressions don't support the null coalescing operator.

```
String primaryName;
String secondaryName = 'Acme';
String acctName = primaryName ?? secondaryName;
List<Account> accounts = [SELECT Name FROM Account WHERE Name = :acctName];
List<List<SObject>> moreAccounts = [
  FIND :acctName
  IN ALL FIELDS
```



```
RETURNING Account (Name)
];
```

## SEE ALSO:

[Apex Developer Guide: Operator Precedence](#)

[Apex Developer Guide: Using SOQL Queries That Return One Record](#)

[IdeaExchange: Null Coalesce Operator](#)



## Get Support for Randomly Generated UUID v4

Use the new UUID class to generate a version 4 universally unique identifier (UUID). The UUID is generated using a cryptographically strong pseudo-random number generator and is represented as 32 hexadecimal values. We delivered this feature thanks to your ideas on IdeaExchange.

**Where:** This change applies to all editions.

**How:** To generate a UUID and perform operations on a UUID instance, use these methods in the UUID class.

**randomUUID ()**

Randomly generates a UUID that uniquely identifies an object.

**equals (obj)**

Compares the UUID instance with the specified object. Returns true if both are equal; otherwise, returns false.

**hashCode ()**

Returns the hashcode corresponding to the UUID instance.

**fromString (string)**

Returns a UUID instance from a string representation of a UUID.

**toString ()**

Returns the string representation of the UUID instance.

Here's an example that uses the `randomUUID ()` class method.

```
UUID randomUuid = UUID.randomUUID();
// Prints the UUID string that was randomly generated
system.debug(randomUuid);

String uuidStr = randomUUID.toString();

UUID fromStr = UUID.fromString(uuidStr);

Assert.areEqual(randomUuid, fromStr);
```

## SEE ALSO:

[Apex Reference Guide: UUID \(can be outdated or unavailable during release preview\)](#)

[IdeaExchange: GUID Generator Function](#)



## Make Callouts After Rolling Back DML and Releasing Savepoints

Roll back all uncommitted DML by using a savepoint. Then use the new `Database.releaseSavepoint` method to explicitly release savepoints before making a desired callout. Previously, callouts after creating savepoints resulted in a `CalloutException` regardless of whether there was uncommitted DML or the changes were rolled back to a savepoint. We delivered this feature thanks to your ideas on IdeaExchange.

**Where:** This change applies to all editions.

**How:** To allow callouts, roll back all savepoints and explicitly release them. In this example, the `makeACallout()` callout succeeds because the uncommitted DML is rolled back and the savepoint is released.


```
Savepoint sp = Database.setSavepoint();
try {
  // Try a database operation
  insert new Account(name='Foo');
  integer bang = 1 / 0;
} catch (Exception ex) {
  Database.rollback(sp);
  Database.releaseSavepoint(sp); // Also releases any savepoints created after 'sp'
  makeACallout(); // Callout is allowed because uncommitted work is rolled back and savepoints
  are released
}
```

In this example, the savepoint isn't released before making the callout. The `CalloutException` informs you that you must release all active savepoints before making the callout.

```
Savepoint sp = Database.setSavepoint();
try {
  makeACallout();
} catch (System.CalloutException ex) {
  Assert.isTrue(ex.getMessage().contains('All active Savepoints must be released before
  making callouts.));
}
```

In this example, DML is pending when the callout is made. The `CalloutException` informs you that you must roll back the transaction before the callout is made or the transaction must be committed.

```
Savepoint sp = Database.setSavepoint();
insert new Account(name='Foo');
Database.releaseSavepoint(sp);
try {
  makeACallout();
} catch (System.CalloutException ex) {
  Assert.isTrue(ex.getMessage().contains('You have uncommitted work pending. Please
  commit or rollback before calling out.));
}
```

 **Note:** As part of this feature, `Database.rollback(Savepoint)` and `Database.setSavepoint()` don't count against the DML row limit, but still count toward the DML statement limit. This change applies to all API versions. Before Spring '24, both the calls incremented the DML row usage limit.

When `Database.releaseSavepoint()` is called, `SAVEPOINT_RELEASE` is logged if savepoints are found and released.

For Apex tests with API version 60.0 or later, all savepoints are released when `Test.startTest()` and `Test.stopTest()` are called. A `SAVEPOINT_RESET` event is logged if any savepoints are reset.

SEE ALSO:

[IdeaExchange: DML Rollback Should Allow HttpCallouts](#)



## Compress and Extract Zip Files in Apex (Developer Preview)

Use the methods in the new `Compression` namespace to easily generate and extract compressed zip files. To optimize compression, you can specify the compression method and level. You can compress multiple attachments or documents as an Apex blob that contains the zip archive. You can also specify the data to extract from the zip archive without uncompressing the entire zip archive. We partially delivered this feature thanks to your ideas on IdeaExchange.



**Note:** Feature is available as a developer preview. Feature isn't generally available unless or until Salesforce announces its general availability in documentation or in press releases or public statements. All commands, parameters, and other features are subject to change or deprecation at any time, with or without notice. Don't implement functionality developed with these commands or tools in a production environment.

**Where:** This feature is available in scratch orgs where the `ZipSupportInApex` feature is enabled. If the feature isn't enabled, Apex code with this feature can be compiled but not executed.

**How:** To add zip entries by specifying details, such as an entry name, comment, and compression method, use the `addEntry(String name, Blob data)`, `addEntry(Compression.ZipEntry prototype)`, and `setMethod(Compression.Method method)` methods in the `ZipWriter` class. To generate a zipped archive and return the result as an Apex blob, use the `getArchive()` method. This code sample compresses email attachments into a single file.

```
Compression.ZipWriter writer = new Compression.ZipWriter();

List<id> contentDocumentIds = new List<id>();

// Add IDs of documents to be compressed to contentDocumentIds

for ( ContentVersion cv : [SELECT PathOnClient, Versiondata
                           FROM ContentVersion
                           WHERE ContentDocumentId IN :contentDocumentIds])
{
    writer.addEntry(cv.PathOnClient, cv.versiondata);
}

blob zipAttachment = writer.getArchive();

Messaging.EmailFileAttachment efa = new Messaging.EmailFileAttachment();
efa.setFileName('attachments.zip');
efa.setBody(zipAttachment);

List<Messaging.EmailFileAttachment> fileAttachments = new
List<Messaging.EmailFileAttachment>();
fileAttachments.add(efa);

Messaging.SingleEmailMessage email = new Messaging.SingleEmailMessage();

// Set all the other email fields, such as addresses, subject, and body
```

```
email.setFileAttachments(fileAttachments);

Messaging.sendEmail(new Messaging.SingleEmailMessage[] { email });
```

Get zip entry details, such as the list of entries in the archive, entry names, and extract the contents of the zip file by using the `getEntries()`, `getEntry(String name)`, `extract(ZipEntry entry)`, and other methods in the `ZipReader` class. This code sample extracts the translation from a callout response.

```
HttpRequest request = new HttpRequest();
request.setEndpoint('callout:My_Named_Credential/translationService');
request.setMethod('POST');

// Set translation service request payload for input to translate
// The translation endpoint will return translations to the requested languages as JSON
// in a Zip archive

HttpResponse response = new Http().send(request);
Blob translationZip = response.getBodyAsBlob();

Compression.ZipReader reader = new Compression.ZipReader(translationZip);
ZipEntry frTranslation = reader.getEntry('translations/fr.json');
Blob frTranslationData = reader.extractEntry(frTranslation);
```

#### SEE ALSO:

[Apex Reference Guide: Compression Namespace \(can be outdated or unavailable during release preview\)](#)

[IdeaExchange: Apex or API - Zip file creation in Salesforce](#)



## Evaluate Dynamic Formulas in Apex (Developer Preview)

Evaluate user-defined formulas for Apex objects and sObjects by using the classes in the new `FormulaEval` namespace. With this feature, avoid unnecessary DML statements to recalculate formula field values or evaluate dynamic formula expressions. We partially delivered this feature thanks to your ideas on IdeaExchange.



**Note:** Feature is available as a developer preview. Feature isn't generally available unless or until Salesforce announces its general availability in documentation or in press releases or public statements. All commands, parameters, and other features are subject to change or deprecation at any time, with or without notice. Don't implement functionality developed with these commands or tools in a production environment.

**Where:** This feature is available in scratch orgs where the `FormulaEvalInApex` feature is enabled. If the feature isn't enabled, Apex code with this feature can be compiled but not executed.

**How:** To create an instance of the formula, call the static method `builder()` in the `FormulaBuilder` class by specifying the formula text, return type, and context object. To validate the formula instance, call the `build()` method. If the validation fails, the `build()` method triggers the `FormulaValidationException` exception.

To calculate the formula expression and return the result, use the `evaluate()` method in the `FormulaInstance` class. If the evaluation results in an error, the method triggers the `FormulaEvaluationException` exception.

Here's an example that uses the `build()` and `evaluate()` methods.

```
global class MotorYacht {
    global Integer lengthInYards;
    global Integer numOfGuestCabins;
    global String name;
    global Account owner;
}

MotorYacht aBoat = new MotorYacht();
aBoat.lengthInYards = 52;
aBoat.numOfGuestCabins = 4;
aBoat.name = 'RV Foo';
FormulaEval.FormulaInstance isItSuper = FormulaEval.FormulaBuilder.builder()
    .withReturnType(FormulaEval.FormulaReturnType.STRING)
    .withType(MotorYacht.class)
    .withFormula('IF(lengthInYards < 100, "Not Super", "Super")')

    .build();
isItSuper.evaluate(aBoat); //=> "Not Super"

aBoat.owner = new Account(Name='Acme Watercraft', Site='New York');
FormulaEval.FormulaInstance ownerDetails = FormulaEval.FormulaBuilder.builder()
    .withReturnType(FormulaEval.FormulaReturnType.STRING)
    .withType(MotorYacht.class)
    .withFormula('owner.Name & " (" & owner.Site & ")')')
    .build();
ownerDetails.evaluate(aBoat); //=> "Acme Watercraft (New York)"
```

The `withType` context type must be a global, user-defined Apex class. Any fields or properties that the formula references must also be global.

SEE ALSO:

[Apex Reference Guide: FormulaEval Namespace \(can be outdated or unavailable during release preview\)](#)

[IdeaExchange: Evaluate Dynamic Formula with Apex](#)

## 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. This update was available starting in Spring '23 and is enforced in Spring '24.

**Where:** This change applies to all editions.

**When:** Salesforce enforces this update in Spring '24. To get the major release upgrade date for your instance, go to [Trust Status](#), search for your instance, and click the maintenance tab.

**Why:** This update improves legacy behavior where Apex REST Response headers weren't validated and enables [RFC 7230](#) validation. After the update, invalid characters such as `/` are no longer accepted.

**How:** Apex that invokes the `RestResource.addHeader(name, value)` method with a header name that isn't RFC 7230-compliant results in a runtime exception of type `InvalidHeaderException`. Before activating this update in production, check with your package providers to make sure that all your installed packages are compatible. Evaluate the impact to your Salesforce org with these checks.

- Run Apex test cases and check for failures caused by `InvalidHeaderExceptions`.
- Invoke your Apex REST API classes and check responses for `InvalidHeaderException` exceptions.
- Inspect Apex code that calls the `RestResource.addHeader(name, value)` method for a `name` parameter with a value that isn't RFC 7230-compliant.

## See Improved Logging When FOR UPDATE Locks Are Released

Record locks that are obtained in Apex using `FOR UPDATE` are automatically released when making callouts. The information is now logged in the debug log and the logged message includes the most recently locked entity type. For example:

```
FOR_UPDATE_LOCKS_RELEASE FOR UPDATE locks released due to a callout. The most recent lock was Account.
```

**Where:** This change applies to all editions.

## Changed Behavior with Type.forName Method

Using an invalid namespace while calling the `Type.forName()` method now returns null. Previously, Apex allowed you to specify an invalid namespace such as `Type.forName('InvalidNamespace', 'OuterClass.InnerClass')` or use an outer class as a namespace such as `Type.forName('OuterClass', 'InnerClass')` with indeterminate results.

**Where:** This change applies to Salesforce orgs in all editions. This change is a versioned behavior change in API version 60.0 and later.

## Improved Validation and Limit Accounting with DML on External Objects

Starting Spring '24, only external objects can use the DML methods such as `Database.insertImmediate()` and `Database.insertAsync()`. A catchable `TypeException` is thrown if object types other than external or big objects are used in the lists of arguments to these DML methods. Further, these DML operations no longer increment DML statement and record limits. Previously, there was no validation to ensure that external and non-external objects weren't mixed in the arguments to these DML calls.

**Where:** This change applies to all editions.

## New Default Quiddity Enum Value

A quiddity value of undefined (UD) is the new default when an event hasn't been assigned a more descriptive quiddity. Previously, the default was Synchronous Uncategorized (R).

**Where:** This change applies to all editions and is a versioned behavior change in API version 60.0 and later.

## Provide Data to Einstein with Invocable Actions

Now you can create an invocable action in Apex that integrates with a prompt template in Prompt Builder. The invocable action performs dynamic logic and actions to generate output text that's merged into the associated prompt template's resolution.

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

**How:** Create an Apex method that uses the `InvocableMethod` annotation and the `capabilityType` modifier.

SEE ALSO:

[Salesforce Help: Ground with Apex](#)

[Apex Developer Guide: InvocableMethod Annotation](#)

[Simplify Daily Tasks with Prompt Builder \(Generally Available\)](#)

[Provide Data to Einstein with Template-Triggered Prompt Flows](#)

## API

Secure API access with a new user profile and more control over XML deserialization. And the previously announced retirement of API versions 21.0 through 30.0 of the Salesforce Platform API is delayed until Summer '25.

### [Secure API Access with the New Least-Privilege User Profile](#)

The new Minimum Access - API Only Integrations user profile is used with the Salesforce Integration user license to provide the minimum required access to API users. The Salesforce API Only Systems Integration user profile currently in use incorrectly provides CRUD permissions to custom objects. Replace with the new Minimum Access - API Only Integrations user profile.

### [Control API Access to XML Deserialization of Apex Classes](#)

Developers constructing Apex classes in managed packages via API call using XML deserialization must have explicit access to those classes via the `@JsonAccess` annotation. The `@JsonAccess` annotation controls XML deserialization.

### [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.

### [Deploy and Retrieve More Metadata via REST and SOAP Metadata API](#)

The previous maximum uncompressed folder size for SOAP retrieve operations and REST deployments was 400 MB. Now, the limit is increased to 600 MB.

## Secure API Access with the New Least-Privilege User Profile

The new Minimum Access - API Only Integrations user profile is used with the Salesforce Integration user license to provide the minimum required access to API users. The Salesforce API Only Systems Integration user profile currently in use incorrectly provides CRUD permissions to custom objects. Replace with the new Minimum Access - API Only Integrations user profile.

**Where:** One or more Salesforce Integration user licenses are available by default in Enterprise, Unlimited, Performance, and Developer editions. More add-on licenses are available to purchase for these editions.

**When:** Beginning with the Spring '24 release, the Salesforce API Only Systems Integration user profile isn't available in newly provisioned Salesforce orgs.

**How:** The new profile is based on the existing Minimum Access - Salesforce profile and provides the API Enabled and Api Only User permissions. You can grant additional permissions to API users by using permission sets and permission set groups.

## Control API Access to XML Deserialization of Apex Classes

Developers constructing Apex classes in managed packages via API call using XML deserialization must have explicit access to those classes via the `@JsonAccess` annotation. The `@JsonAccess` annotation controls XML deserialization.

**Where:** This change applies to all API versions.

**Why:** Previously, developers could construct instances of Apex classes through XML serialization without restriction. This provided access to Apex classes that developers shouldn't have had access to. Attempting XML deserialization without the annotation's permission now results in a 400 response with an `XML_PARSER_ERROR` error code.

SEE ALSO:

[Apex Developer Guide: JsonAccess Annotation](#)

## 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:** Before the Summer '25 release, modify or upgrade all applications to function with current API versions. 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.



## Deploy and Retrieve More Metadata via REST and SOAP Metadata API

The previous maximum uncompressed folder size for SOAP retrieve operations and REST deployments was 400 MB. Now, the limit is increased to 600 MB.

**Where:** This change applies to all API versions.

**Why:** Over time, we saw that we can support a higher limit while still maintaining fair use.

SEE ALSO:

[Salesforce Developer: Metadata Limits](#)

[Salesforce Developer: Deploying and Retrieving Metadata with the Zip File](#)

## Bulk API 2.0

Query whether PK chunking is supported for an object.

### Retrieve PK Chunking Supportability With a Query Instead of Referencing Documentation

Bulk API 2.0's "Get Job Info Query" API returns a new Boolean field `isPkChunkingSupported`. This field indicates whether PK chunking is supported for the object being queried (`true`) or not (`false`). Previously, you referred to the Salesforce Bulk API 2.0 documentation to look up whether PK chunking is supported for an object.

In Winter '24, the number of objects for which PK chunking is supported in Bulk API 2.0 Query increased into the thousands. Adding this API call provides a scalable mechanism for retrieving this information easily so you don't have to look through pages of developer documentation.

### Improved Bulk API 2.0 Query Processing

To increase job processing success, Bulk API 2.0 splits batches that have failed into smaller batches and chunk sizes. Previously, Bulk API 2.0 used a fixed chunk size. If a batch couldn't be processed, it was retried and then eventually marked as failed.

SEE ALSO:

[Salesforce Bulk API 2.0 and Bulk API Developer Guide: Get Information About a Query Job](#)

[Salesforce Release Notes \(Winter '24\): Use Thousands of PK Chunking Enabled Objects with Bulk API 2.0](#)

## 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.

### Control Which Profile Settings Are Packaged

Use the new `scopeProfiles` setting in the `sfdx-project.json` file to control which profile settings are included in a new package version when you run the `sf package version create` command.

### IdeaExchange Delivered: Remove Custom Metadata Type Records from a Second-Generation Managed Package

Better manage your second-generation managed packages with the ability to remove protected and public records from a custom metadata type. After you remove the records from a package, what happens to those records in the subscriber org depends on the record visibility. If the records are visible to the subscriber org, they're marked as deprecated. If the records aren't visible to the subscriber org, they're deleted. Alert your subscribers that deprecated records count against their subscriber org limit, and encourage them to delete any deprecated records. We partially delivered this feature thanks to your ideas on IdeaExchange.

### [View Orgs Eligible for a Push Upgrade](#)

Managing your push upgrades is easier. The Package Manager page now displays only valid production orgs in the Target Organization list. Valid production orgs include orgs with a status of trial, free, or active.

## Control Which Profile Settings Are Packaged

Use the new `scopeProfiles` setting in the `sfdx-project.json` file to control which profile settings are included in a new package version when you run the `sf package version create` command.

**Where:** This change applies to unlocked packages and second-generation managed packages.

**How:** If you set `scopeProfiles` to true for a package directory, profile settings from only the package directory being packaged are included, and profile settings outside of that package directory are ignored. When you set `scopeProfiles` to false, which is the default value, the new package version includes relevant pieces of profile settings in any package directory defined in `sfdx-project.json`.

The `scopeProfiles` parameter is a child of `packageDirectory`, as shown in this example.

```
{
  "packageDirectories": [
    {
      "path": "force-app",
      "package": "TV_un1",
      "scopeProfiles": "true",
      "versionName": "ver 0.1",
      "versionNumber": "0.1.0.NEXT",
      "default": true,
      "unpackagedMetadata": {
        "path": "my-unpackaged-directory"
      }
    }
  ],
  "namespace": "",
  "sfdcLoginUrl": "https://login.salesforce.com",
  "sourceApiVersion": "60.0"
}
```

### SEE ALSO:

[Second-Generation Managed Packaging Developer Guide: Advanced Project Configuration Parameters for Second-Generation Managed Packages](#)

[Second-Generation Managed Packaging Developer Guide: How We Handle Profile Settings in Second-Generation Managed Packages](#)



## Remove Custom Metadata Type Records from a Second-Generation Managed Package

Better manage your second-generation managed packages with the ability to remove protected and public records from a custom metadata type. After you remove the records from a package, what happens to those records in the subscriber org depends on the record visibility. If the records are visible to the subscriber org, they're marked as deprecated. If the records aren't visible to the subscriber org, they're deleted. Alert your subscribers that deprecated records count against their subscriber org limit, and encourage them to delete any deprecated records. We partially delivered this feature thanks to your ideas on IdeaExchange.

**Where:** This change applies to second-generation managed packages.

**How:** Removing metadata from managed packages requires approval from Salesforce. To request access to the component removal feature, log a support case in the [Salesforce Partner Community](#).

SEE ALSO:

[Second-Generation Managed Packaging Developer Guide: Custom Metadata Type Records](#)

[Second-Generation Managed Packaging Developer Guide: Remove Metadata Components from Second-Generation Managed Packages](#)

[Salesforce Help: Custom Metadata Allocations and Usage Calculations \(can be outdated or unavailable during release preview\)](#)

## View Orgs Eligible for a Push Upgrade

Managing your push upgrades is easier. The Package Manager page now displays only valid production orgs in the Target Organization list. Valid production orgs include orgs with a status of trial, free, or active.

**Where:** This change applies to first-generation managed packages.

## Development Environments

Development environments are full-featured Salesforce environments that you use to develop and test existing or new features and custom applications. They include Developer Edition orgs, sandboxes, and scratch orgs.

### [Select Who Has Access To a Sandbox](#)

Selective Sandbox Access helps you limit access to a sandbox to only required users when refreshing or creating a sandbox. By default, all active users in the source org have access to the sandbox, but only the user who creates the sandbox has their email address in the original format (without .invalid appended to it). With selective access, a Salesforce admin grants access to specific users through a public group. The email addresses for the users included in the group remain in their original format and don't need to be modified. Users who aren't part of the public group have to be unfrozen in the sandbox in order to access it.

### [Capture a Scratch Org's Configuration with Scratch Org Snapshots \(Beta\)](#)

Capture a snapshot of a scratch org's configuration so that you can use it to create scratch org replicas. A snapshot is a point-in-time copy of a scratch org.

### [IdeaExchange Delivered: Log In to All Your Sandboxes from Setup](#)

To help you manage your sandboxes, logins from the Sandboxes Setup page now use the sandbox's My Domain login URL. Previously, the process used the sandbox's instanced URL, so you could log into a sandbox from Setup only if that sandbox allowed logins from <https://test.salesforce.com>. We delivered this feature thanks to your ideas on IdeaExchange.

## Select Who Has Access To a Sandbox

Selective Sandbox Access helps you limit access to a sandbox to only required users when refreshing or creating a sandbox. By default, all active users in the source org have access to the sandbox, but only the user who creates the sandbox has their email address in the original format (without .invalid appended to it). With selective access, a Salesforce admin grants access to specific users through a public group. The email addresses for the users included in the group remain in their original format and don't need to be modified. Users who aren't part of the public group have to be unfrozen in the sandbox in order to access it.

**Where:** This change applies to sandboxes of Professional, Enterprise, Performance, Unlimited, and Database.com editions. For now, this feature is enabled only in production orgs with fewer than 60 public groups.

**Who:** All users in the production org with the Manage Sandboxes user permission.

SEE ALSO:

[Salesforce Help: Determine Who Has Access to a Sandbox](#)

[Salesforce Help: Create and Edit Groups](#)


[Salesforce Help: Freeze or Unfreeze User Accounts](#)

[Salesforce Help: Create a Sandbox](#)

[Salesforce Help: Clone a Sandbox](#)

## Capture a Scratch Org's Configuration with Scratch Org Snapshots (Beta)

Capture a snapshot of a scratch org's configuration so that you can use it to create scratch org replicas. A snapshot is a point-in-time copy of a scratch org.

 **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](#).

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

**When:** This feature is available when your Dev Hub org is upgraded to the Spring '24 release.

**Why:** Configuring a scratch org with a project's dependencies can be a manual and time-consuming process. It can require pushing dependent metadata to a scratch org, seeding it with sample data, installing a package or two, and then performing manual tasks directly in the scratch org. And then, poof, the scratch org expires, and you have to start all over again. With scratch org snapshots, you can quickly replicate scratch orgs with the required project dependencies.

**How:** Enable Scratch Org Snapshots in the Dev Hub org that you use to create scratch orgs. If you don't have access to the Scratch Orgs Setup page, ask your Salesforce admin for help. Then use Salesforce CLI commands to create and manage the snapshot, such as `org create snapshot` and `org list snapshot`.

SEE ALSO:

[Salesforce DX Developer Guide: Scratch Org Snapshots \(Beta\)](#)



## Log In to All Your Sandboxes from Setup

To help you manage your sandboxes, logins from the Sandboxes Setup page now use the sandbox's My Domain login URL. Previously, the process used the sandbox's instanced URL, so you could log into a sandbox from Setup only if that sandbox allowed logins from `https://test.salesforce.com`. We delivered this feature thanks to your ideas on IdeaExchange.

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

SEE ALSO:

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

[IdeaExchange: Sandbox Login URLs in Setup should direct correctly based on My Domain settings](#)

## 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.

### [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 with Scale Center](#)

Diagnose root causes and act on scale issues earlier in your development cycle. View org performance metrics and analyze performance reports.

### [Plan and Test with Scale Test](#)

Use metrics to plan scale tests. Book a slot on your sandbox instance calendar and test at production peak load. Compare performance data from recent tests.

### [Replace Workbench With Salesforce Developer Tools](#)

Workbench (<https://workbench.developerforce.com>) is an open-source tool for interacting with your org. However, because Salesforce doesn't maintain Workbench, we can't address issues or bugs related to using it. We recommend that you use our alternative and integrated tools instead, such as Code Builder, Salesforce CLI, and VS Code Extensions.

## 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](#).

### **Code Builder**

Code Builder is a web-based integrated development environment that has all the power and flexibility of Visual Studio Code, Salesforce Extensions for VS Code, and Salesforce CLI in your web browser. Code Builder is now generally available.

### **Einstein for Developers (Beta)**

Einstein for Developers is an AI-powered developer tool that's available as an easy-to-install Visual Studio Code extension built using CodeGen, the secure, custom AI model from Salesforce. Einstein for Developers is enabled in all Salesforce orgs by default. 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 with Scale Center

Diagnose root causes and act on scale issues earlier in your development cycle. View org performance metrics and analyze performance reports.

**Where:** This change applies to Lightning Experience in the Unlimited Edition and Signature Success customers. Scale Center isn't supported in Government Cloud Plus.

**Who:**

- Scale Center is generally available at no additional cost for all Unlimited Edition (UE) Full Copy Sandbox, Signature, and Scale Test customers.
- You can enable Scale Center for five Standard (non-SysAdmin) users per org.
- You can run 15 Deep Dive investigations per week, per org.
- Users are subject to the applicable terms provided at [Agreements and Terms](#).

**Why:** The ApexGuru Insights feature is now Generally Available. This feature uses AI and machine learning models to analyze Apex classes and entry points, giving you critical code recommendations that improve your implementation.

**How:** From Setup, in the Quick Find box, enter *Scale*, and then click **Scale Center**.

## Plan and Test with Scale Test

Use metrics to plan scale tests. Book a slot on your sandbox instance calendar and test at production peak load. Compare performance data from recent tests.

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

**Who:**

- Scale Test is available as a paid add-on for customers with a Full Copy Sandbox, which includes the Test Scheduler and Test Execution features.
- As part of the paid add-on, the Test Plan Creation feature is available in USA Hyperforce production.
- Users are subject to the applicable terms provided at [Agreements and Terms](#).

**How:** To get access, contact your customer success representative or account executive.

From Setup, in the Quick Find box, enter *Scale*, and then click **Scale Test**.

## Replace Workbench With Salesforce Developer Tools

Workbench (<https://workbench.developerforce.com>) is an open-source tool for interacting with your org. However, because Salesforce doesn't maintain Workbench, we can't address issues or bugs related to using it. We recommend that you use our alternative and integrated tools instead, such as Code Builder, Salesforce CLI, and VS Code Extensions.

**Why:** Salesforce can't assure our developers that Workbench will be available in the future. Prepare to use our other supported tools.

**How:** Review the replacement tool options for existing Workbench users. See [Replacement Tools for Workbench](#) in *Salesforce Help*.

SEE ALSO:

[Code Builder](#)

[Salesforce Extensions for VS Code](#)

[Salesforce CLI Command Reference](#)

## Salesforce Functions

Salesforce Functions is retiring on January 31, 2025. Learn about the retirement plan for Salesforce Functions.

### [Salesforce Functions Is Being Retired](#)

Salesforce Functions is retiring on January 31, 2025. You can continue using your subscription through your existing Order Term. To preserve the capabilities that Salesforce Functions provided to your org, you must deploy an alternative solution before your existing Order Term ends.

## Salesforce Functions Is Being Retired

Salesforce Functions is retiring on January 31, 2025. You can continue using your subscription through your existing Order Term. To preserve the capabilities that Salesforce Functions provided to your org, you must deploy an alternative solution before your existing Order Term ends.

See [Salesforce Functions Retirement](#) on the Heroku Dev Center for the end-of-life timeline and more information on migrating your functions.

**Where:** This change applies to Lightning Experience, Salesforce Classic, and all versions of the mobile app in Professional, Unlimited, and Developer editions.

SEE ALSO:

[Developer Doc: Salesforce Functions Release Notes](#)

## AppExchange Partners

The UsersWithMFA attribute will no longer be available for trial orgs in AppExchange App Analytics subscriber snapshots. Analyze subscriber activity by creating custom interactions in AppExchange App Analytics. The Cloud Security website is being retired in early February. Traffic sources in AppExchange Marketplace Analytics are updated to reflect the new Explore experience and pages that were retired from AppExchange. Marketplace Analytics is updated to reflect the Partner Co-Marketing Program's latest branding. Discover what brings customers to your listing with enhanced AppExchange lead descriptions.

### [UsersWithMFA Attribute Will No Longer Be Populated for Trial Orgs in Subscriber Snapshots](#)

In Spring '24, the UsersWithMFA attribute will no longer be available for trial orgs in AppExchange App Analytics subscriber snapshots. You can continue to determine the percentage of subscribers who enabled multi-factor authentication (MFA) from the `attribute_value` when `attribute_name` equals `UsersWithMFA` for active and demo orgs.

### [Log Custom Interactions in AppExchange App Analytics](#)

To understand which features and UI components a subscriber interacts with and how they flow through a user journey, create custom interactions with Apex enums and the `IsvPartners.AppAnalytics.logCustomInteraction` Apex method.

### [The Cloud Security Website Is Being Retired](#)

The Cloud Security site at <https://security.my.salesforce-sites.com/> contains outdated and unclear references to tools, docs, and other resources related to secure software development. The site is being retired in early February 2024 as part of an effort to improve the quality of our content library.

### [Get More Insights About Your Customer's Discovery Journey in the Updated AppExchange Marketplace Analytics Dashboard](#)

To help you better understand how customers discover your listing, the Activity Source Timeline, Activity Sources, and Activity Source by Region visualizations in AppExchange Marketplace Analytics now include traffic sources for AppExchange Explore pages. The AppExchange Browse and AppExchange Categories traffic sources are updated to reflect page retirements on AppExchange. The AppExchange Marketing Program (AMP) is now the Partner Co-Marketing Program, and the Marketplace Analytics interface is updated to reflect this change.

### [Associate AppExchange Leads with Marketing Campaigns, Promotions, and Other Traffic Sources](#)

The Description field on AppExchange leads now includes details about what brought the customer to your listing, such as a Google search, marketing campaign, or promotion. For easier integration with your CRM's automated business processes, lead source data, plus the customer's contact preferences, are shared in JSON format instead of a text string. To receive details about a marketing campaign or promotion, configure your listing's referrer URL to include Urchin Tracking Module (UTM) parameters or referral codes.

## UsersWithMFA Attribute Will No Longer Be Populated for Trial Orgs in Subscriber Snapshots

In Spring '24, the UsersWithMFA attribute will no longer be available for trial orgs in AppExchange App Analytics subscriber snapshots. You can continue to determine the percentage of subscribers who enabled multi-factor authentication (MFA) from the `attribute_value` when `attribute_name` equals `UsersWithMFA` for active and demo orgs.

**Where:** This change applies to Lightning Experience and Salesforce Classic in Developer Edition.

**Who:** ISV partners can use `attribute_value` to determine the percentage of subscribers using MFA for their managed packages that passed security review.

**How:** To activate App Analytics on your managed package:

- For a first-generation (1GP) managed package, log in to your packaging org. Then follow the instructions in [Enable App Analytics on Your First-Generation Managed Package](#).
- For a second-generation (2GP) managed package, follow the instructions in [Enable App Analytics on Your Second-Generation Managed Package](#).

SEE ALSO:

[Developer Documentation: Subscriber Snapshots](#)

## Log Custom Interactions in AppExchange App Analytics

To understand which features and UI components a subscriber interacts with and how they flow through a user journey, create custom interactions with Apex enums and the `ISVPartners.AppAnalytics.logCustomInteraction` Apex method.

**Where:** This change applies to Lightning Experience and Salesforce Classic in Developer Edition. AppExchange App Analytics is available only for managed packages that passed security review.

**Who:** To use this feature, you must be an ISV partner with a managed package that passed security review.

**How:** To activate App Analytics on your managed package:

- For a first-generation (1GP) managed package, log in to your packaging org. Then follow the instructions in [Enable App Analytics on Your First-Generation Managed Package](#).
- For a second-generation (2GP) managed package, follow the instructions in [Enable App Analytics on Your Second-Generation Managed Package](#).



To use custom interactions, include Apex enums in your packaged Apex code. Then instrument your code by using the `ISVPartners.AppAnalytics.logCustomInteraction` Apex method and one of your Apex enum values. When a user interacts with a packaged component that calls Apex and executes this Apex method, log data is generated in App Analytics.

Retrieve and filter your package usage log data on `custom_entity_type` equal to `CustomInteractionLabel` and on `log_record_type` equal to `CustomInteraction`. Or filter your package usage summary data on `custom_entity_type` by `CustomInteractionLabel`. For more information on custom interactions, read [Considerations for Custom Interactions](#).

SEE ALSO:

[Apex Developer Guide: Enums](#)

## The Cloud Security Website Is Being Retired

The Cloud Security site at <https://security.my.salesforce-sites.com/> contains outdated and unclear references to tools, docs, and other resources related to secure software development. The site is being retired in early February 2024 as part of an effort to improve the quality of our content library.

**How:** Instead of the information listed on the website, use these resources.

- [ISV Partner Program](#)
- [ISV Partner Portal](#)
- [Security Review Documentation](#)
- [Security Review Requirements](#)
- [Force.com Security Source Code Scanner](#)
- [Force.com Secure Coding Guidelines](#)
- [ISV Security Office Hours](#)

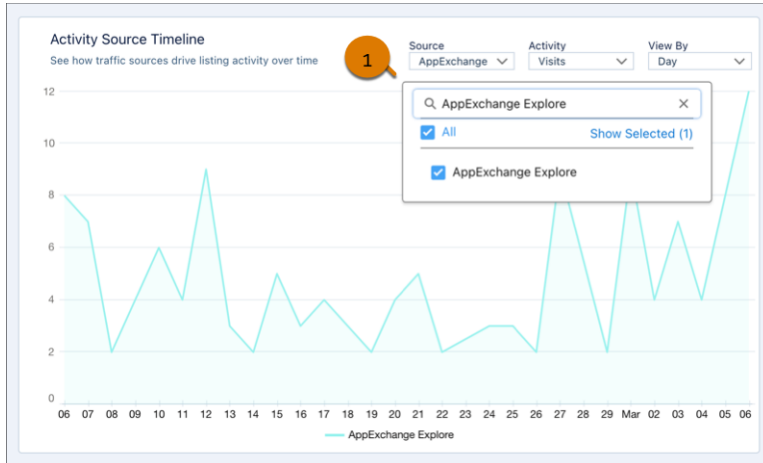
If you have questions about this retirement, contact the salesforce.com security team at [securecloud@salesforce.com](mailto:securecloud@salesforce.com).

## Get More Insights About Your Customer's Discovery Journey in the Updated AppExchange Marketplace Analytics Dashboard

To help you better understand how customers discover your listing, the Activity Source Timeline, Activity Sources, and Activity Source by Region visualizations in AppExchange Marketplace Analytics now include traffic sources for AppExchange Explore pages. The AppExchange Browse and AppExchange Categories traffic sources are updated to reflect page retirements on AppExchange. The AppExchange Marketing Program (AMP) is now the Partner Co-Marketing Program, and the Marketplace Analytics interface is updated to reflect this change.

**Who:** To use the AppExchange Partner Console, you must have the Manage Listings permission in the Salesforce Partner Community.

**Why:** AppExchange Explore is a new way for customers to discover solutions based on their business challenges or interests. The AppExchange Explore traffic source (1) in Marketplace Analytics shows how many leads, installs, and other activity on your listing originated on Explore pages. For Partner Co-Marketing Program participants, the AppExchange Sponsored Explore source shows the activity on your listing that originated from the Sponsored Solutions section on an Explore page.



The AppExchange Browse and AppExchange Categories traffic sources are updated to reflect the retirements of Solutions by Type, Product Collections, and Industry Collections pages. After March 26, 2024, AppExchange Categories no longer captures listing activity data, and AppExchange Browse no longer includes activity data from Product Collections and Industry Collections pages.

To align with the Partner Co-Marketing Program's latest branding, the AMP Insights tab is renamed to Co-Marketing Insights and the AMP Performance Timeline is renamed to the Co-Marketing Performance Timeline.

**How:** To view the updated Marketplace Analytics dashboard, open the [AppExchange Partner Console](#) and click **Analytics**.

SEE ALSO:

- [Explore AppExchange Solutions Based on Your Interests](#)
- [Navigate AppExchange More Efficiently](#)

## Associate AppExchange Leads with Marketing Campaigns, Promotions, and Other Traffic Sources

The Description field on AppExchange leads now includes details about what brought the customer to your listing, such as a Google search, marketing campaign, or promotion. For easier integration with your CRM's automated business processes, lead source data, plus the customer's contact preferences, are shared in JSON format instead of a text string. To receive details about a marketing campaign or promotion, configure your listing's referrer URL to include Urchin Tracking Module (UTM) parameters or referral codes.

**When:** This feature is available starting April 30, 2024.

**Who:** To use this feature, you must be an ISV partner with a published solution listing that's configured to receive AppExchange leads.

**How:** When you receive an AppExchange lead, the Description field now contains a JSON block that includes:

- Your listing URL.
- The customer's contact preferences about any other products that you offer.
- Details about the referring traffic source, such as a marketing campaign or keyword search.

By default, AppExchange assigns an internal or external traffic source to the `other_source` property. Customer contact preference is stored as a boolean in the `allow_contact_other_products` property. Previously, AppExchange shared contact preference as a text string. If your automated business processes use this string, update them to accept JSON input.

This example shows the contents of the Description field for a lead associated with an AppExchange recommendation.

```
{
  "lead_description": {
    "allow_contact_other_products": true,
    "listing_url":
    "https://appexchange.salesforce.com/appxListingDetail?listingId=a0NXXXXXXXXXXXXXXXXX",
    "other_source": "AppExchange Recommended"
  }
}
```

To receive a marketing campaign or promotion details in a lead description, include UTM parameters or a referral code in your listing URL.

```
https://appexchange.salesforce.com/appxListingDetail?listingId=a0NXXXXXXXXXXXXXXXXX
&utm_campaign=example-campaign&utm_content=example-content&utm_medium=example-medium
&utm_source=example-source&utm_term=example-term&referral_code=example-code
```

Where `a0NXXXXXXXXXXXXXXXXX` is your listing ID. This example URL results in the following lead description.

```
{
  "lead_description": {
    "allow_contact_other_products": true,
    "listing_url":
    "https://appexchange.salesforce.com/appxListingDetail?listingId=a0NXXXXXXXXXXXXXXXXX",
    "utm_parameters": {
      "utm_campaign": "example-campaign",
      "utm_content": "example-content",
      "utm_medium": "example-medium",
      "utm_source": "example-source",
      "utm_term": "example-term"
    },
    "referral_code": "example-code"
  }
}
```

## Change Data Capture

Receive change events for more objects.

### [IdeaExchange Delivered: Receive Change Event Notifications for More Objects](#)

With Change Data Capture, you can now receive notifications of record changes for more objects. We delivered the OpportunityLineItem change event feature thanks to your ideas on IdeaExchange.



### Receive Change Event Notifications for More Objects

With Change Data Capture, you can now receive notifications of record changes for more objects. We delivered the OpportunityLineItem change event feature thanks to your ideas on IdeaExchange.

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

**How:** Select the objects that you want to get notifications for on the Change Data Capture page in Setup or create a custom channel. You can now receive change events for:

- Accreditation
- AssessmentConfiguration
- AssessmentEnvelope
- AssessmentEnvelopeItem
- BoardCertification
- CareBarrierDeterminant
- CareBarrierType
- CareBenefitVerifyRequest
- CareBenefitVerifySettings
- CareDeterminantType
- CareInterventionType
- CareLimitType
- CarePreauth
- CarePreauthItem
- CareProviderAdverseAction
- CareProviderFacilitySpecialty
- CareProviderSearchableField
- CareProviderSearchConfig
- CareRegisteredDevice
- CareTaxonomy
- CoverageBenefitItemLimit
- DigitalSignature
- HealthCareDiagnosis
- HealthcareFacilityNetwork
- HealthcarePayerNetwork
- HealthCareProcedure
- HealthcareProviderNpi
- HealthcareProviderTaxonomy
- LearningItemProgress
- OpportunityLineItem
- PlanBenefit
- PlanBenefitItem
- PurchaserPlanAssn
- ReceivedDocumentType
- TimelineObjectDefinition

## Platform Events

Find uncaught exceptions of triggers in event log files. Learn about the retirement plan for some Streaming API versions.

### [Find Uncaught Exceptions of Platform Event Triggers in Event Log Files](#)

If an unhandled exception occurs during the execution of your platform event Apex trigger, you can get information about the exception using event log files in Event Monitoring. Examples of an unhandled exception include an uncatchable limit exception or an exception that the trigger doesn't catch. Previously, unhandled exceptions in platform event Apex triggers weren't available in event log files.

### [Streaming API Versions 23.0 Through 36.0 Are Being Retired](#)

Streaming API versions 23.0 through 36.0 are scheduled for retirement in Winter '25. They're deprecated and no longer supported. We strongly recommend that you use a recent Streaming API version or a version that's greater or equal to version 37.0, which corresponds to Durable Streaming. The newer Streaming API versions are maintained with product enhancements and bug fixes.

## Find Uncaught Exceptions of Platform Event Triggers in Event Log Files

If an unhandled exception occurs during the execution of your platform event Apex trigger, you can get information about the exception using event log files in Event Monitoring. Examples of an unhandled exception include an uncatchable limit exception or an exception that the trigger doesn't catch. Previously, unhandled exceptions in platform event Apex triggers weren't available in event log files.

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

**How:** To retrieve information about the unhandled exception, query `EventLogFile`. The event type for unhandled exceptions is Apex Unexpected Exception Event Type (`ApexUnexpectedException`).

SEE ALSO:

[Object Reference for the Salesforce Platform: EventLogFile](#)

[Object Reference for the Salesforce Platform: Apex Unexpected Exception Event Type](#)

[Trailhead: Event Monitoring](#)

## Streaming API Versions 23.0 Through 36.0 Are Being Retired

Streaming API versions 23.0 through 36.0 are scheduled for retirement in Winter '25. They're deprecated and no longer supported. We strongly recommend that you use a recent Streaming API version or a version that's greater or equal to version 37.0, which corresponds to Durable Streaming. The newer Streaming API versions are maintained with product enhancements and bug fixes.

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

SEE ALSO:

[Knowledge Article: Streaming API Versions 23.0 through 36.0 Retirement](#)

## Event Bus

Resume your Pub/Sub API subscriptions with managed event subscriptions (beta). Benefit from expanded regional processing for Pub/Sub API and Event Relay.

### Manage Your Event Subscriptions with Pub/Sub API (Beta)

Use managed event subscriptions to track the events that a subscriber client consumed and to resume a subscription from where it left off after a client disconnects. When you resubscribe with the new `ManagedSubscribe` RPC method, the subscription resumes after the last Replay ID that the client successfully committed on the server. You can subscribe to platform events and change events, custom platform event channels and change data capture channels, and the standard change data capture channel (`ChangeEventS`). After the initial subscription call, commit the Replay ID of the event you last processed every time you receive a batch of events.

### Expanded Regional Processing for the Pub/Sub API Global Endpoint

We added a new region for routing and processing Pub/Sub API requests for the global endpoint:

`api.pubsub.salesforce.com:{port}`. The Pub/Sub API service can now process requests in the new India region, in addition to the United States and the European Union. The new region helps improve API request latency.

### Expanded Regional Processing for Event Relays

The Event Relay service now processes events in the new European Union region. Previously, the service processed events only in the United States region. The addition of the new region helps improve latency for event processing.

## Manage Your Event Subscriptions with Pub/Sub API (Beta)

Use managed event subscriptions to track the events that a subscriber client consumed and to resume a subscription from where it left off after a client disconnects. When you resubscribe with the new `ManagedSubscribe` RPC method, the subscription resumes after the last Replay ID that the client successfully committed on the server. You can subscribe to platform events and change events, custom platform event channels and change data capture channels, and the standard change data capture channel (`ChangeEventS`). After the initial subscription call, commit the Replay ID of the event you last processed every time you receive a batch of events.

**Where:** This change applies to Enterprise, Performance, Unlimited, and Developer editions. Pub/Sub API isn't available in Non-Hyperforce Public Cloud and Government Cloud.

 **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 change is available after Spring '24.

**How:** Managed subscriptions use configuration options that you set in `ManagedEventSubscription` using Tooling API or Metadata API.

As part of this change, the new bidirectional streaming `ManagedSubscribe` RPC method is available.

```
rpc ManagedSubscribe (stream ManagedFetchRequest) returns (stream ManagedFetchResponse)
```

In addition to the RPC method, these Protobuf messages are added.

- `ManagedFetchRequest`
- `ManagedFetchResponse`
- `CommitReplayRequest`
- `CommitReplayResponse`

The client calls `ManagedSubscribe` to subscribe using the ID of `ManagedEventSubscription`. A subscription ID is unique per client and can't be shared with other clients for the same Salesforce org. Subscriptions in Pub/Sub API are pull-based, so clients specify the number of events to request in `ManagedFetchRequest`. The events are returned in `ManagedFetchResponse`. A client commits a Replay ID by setting the `CommitReplayRequest` field in `ManagedFetchRequest`.

SEE ALSO:

[Metadata API Developer Guide: ManagedEventSubscription \(can be outdated or unavailable during release preview\)](#)

[Tooling API Developer Guide: ManagedEventSubscription \(can be outdated or unavailable during release preview\)](#)

## Expanded Regional Processing for the Pub/Sub API Global Endpoint

We added a new region for routing and processing Pub/Sub API requests for the global endpoint:

`api.pubsub.salesforce.com:{port}`. The Pub/Sub API service can now process requests in the new India region, in addition to the United States and the European Union. The new region helps improve API request latency.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions. Pub/Sub API isn't available in Government Cloud.

SEE ALSO:

[Pub/Sub API Documentation: AWS Regions](#)

## Expanded Regional Processing for Event Relays

The Event Relay service now processes events in the new European Union region. Previously, the service processed events only in the United States region. The addition of the new region helps improve latency for event processing.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions. Event Relay isn't available in Government Cloud.

SEE ALSO:

[Salesforce Help: Event Relay Considerations](#)

## New and Changed Items for Developers

Here is where you can find new and changed objects, calls, classes, components, commands, and more that help you customize Salesforce features.

[Lightning Components: 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 60.0.

## Lightning Components: New and Changed Items

Build UI easily with these new and changed resources.

[New and Changed Lightning Web Components](#)

Build UI easily with these new and changed components.

[New and Changed Modules for Lightning Web Components](#)

Do more with Lightning web components by using modules.

### New and Changed Aura Components

Build UI easily with these new and changed components.

## New and Changed Lightning Web Components


Build UI easily with these new and changed components.

### New Components

These components are new and require API version 60.0 or later.

#### **wave-wave-dashboard-lwc (Beta)**

Embeds CRM Analytics dashboards in Lightning Experience pages, like Home, Accounts, or Opportunities, and in other Lightning web components. It displays interactive dashboards with parameters for customizations like header and title visibility.

 **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](#).

### Changed Lightning Web Components

These components have changed.

#### **lightning-datatable**

This attribute is new.

- `wrap-table-header`—Specifies that the header text for each table column wraps if it doesn't fit within the column width. Up to three lines of wrapped text display and the remaining text is truncated. The default value is `false`.

The `lightning-datatable` component supports a custom data source component that you can create and use as a child component to pass custom data types through a `customdatatypes` slot. When you use this feature, custom data types can be determined dynamically at run time based on context. For example, you can pass one set of data types when the datatable displays a list of Accounts and another set when it displays a list of Contacts. See [Create a Custom Data Type](#) in *Lightning Web Components Developer Guide* (can be outdated or unavailable during release preview).

#### **lightning-input**

This attribute is new.

- `role`—Creates an accessible combo box using `lightning-input` instead of the `lightning-combobox` component or a custom component. Set `role="combobox"` and `type="text"` to create a combo box. The only valid value for `role` is `combobox`.

See [Component Reference: lightning-input](#).

These accessibility behaviors are new or changed.

- These aria attributes are passed down for these input types: `checkbox`, `checkbox-button`, `email`, `file`, `number`, `password`, `range`, `search`, `tel`, `text`, `toggle`, and `url`.
  - `aria-keyshortcuts`
  - `aria-disabled`
  - `aria-roledescription`
  - `aria-autocomplete`
  - `aria-expanded`



- This attribute was removed for these input types: `checkbox`, `checkbox-button`, `color`, `email`, `file`, `number`, `password`, `radio`, `range`, `search`, `tel`, `text`, `toggle`, and `url`.
  - `role="alert"`

### **lightning-input-field**

These behaviors are new.

- Supports use in orgs that have enabled multiple currencies.
- Fields for currency values no longer display a currency symbol. They are formatted as decimal numbers.

### **lightning-modal**

The rules to determine where to place focus in a modal have changed.

- When a header is present, the component places the focus on the title text in the header.
- When a header isn't present, the component places the focus on the first interactive element in the modal body, such as a link, button, or input field.
- When the modal body doesn't have interactive elements, or the only interactive element is a tooltip, the component places focus on the close button.

Previously, when a modal was launched, the focus was on the first interactive element in the modal body, such as a button, link, or input field.

### **lightning-pill**

These accessibility behaviors are changed.

- Keyboard navigation uses only the Tab key between focusable elements, not arrow keys.
- When a pill's remove button has focus, only the Enter key and the Spacebar can activate it to remove the pill. Previously, the Delete and Backspace keys also worked to remove the pill.

### **lightning-pill-container**

This attribute is new.

- `href`—Adds a link to a pill in the container.

These accessibility behaviors are changed.

- Keyboard navigation uses only the Tab key between focusable elements, not arrow keys.
- When a pill's remove button has focus, only the Enter key and the Spacebar can activate it to remove the pill. Previously, the Delete and Backspace keys also worked to remove the pill.

### **lightning-record-form**

These behaviors are new.

- Supports use in orgs that have enabled multiple currencies.
- Fields for currency values no longer display a currency symbol. They are formatted as decimal numbers.

### **lightning-record-picker**

These attributes are new.

- `field-level-help`—Help text that details the purpose and function of the record picker component. The text displays on hover for desktop and on click for mobile experiences.
- `disabled`—When this attribute is present, the component is disabled and you cannot interact it.

The `display-info` attribute has a new property in the referenced object.

- `primaryField`—Specifies the first field to display in a record suggestion. The default is the Name field.

See [Search for Records with the Lightning Record Picker Component \(Generally Available\)](#).

**lightning-tabset**

These attributes are new.

- `heading-label`—Specifies text to use as custom assistive text for the tabset heading. The text is placed in a `div` element with `role=heading` and `aria-level=2`. The default assistive text is `Tabs` in an `h2` element.
- `heading-level`—Specifies the value to pass to `aria-level` when you specify `heading-label`. Accepts values from 1 to 6. The default value is 2.
- `heading-visible`—Determines whether the text that's passed with the `heading-label` attribute is visible above the tabset. The default value is `false`.

These accessibility behaviors are new or changed.

- New attributes for headings enable customized assistive text for tabset headings.
- We changed keyboard navigation within the tabset. You can use the Tab and arrow keys to navigate to the More menu that's created when the viewport is too narrow to show all the tabs. Previously, only the Tab key could move the focus to the More menu.

SEE ALSO:

[Component Library](#)

## New and Changed Modules for Lightning Web Components

Do more with Lightning web components by using modules.

### New Modules

This module is now available.

**lightning/industriesEducationPublicApi**

Use the Industries Education Public API to match a mentor with a mentee and create related records in Education Cloud. The public API updates Benefit Assignment records with Provider lookup and creates Contact Contact Relationship and Party Role Relationship records for Mentoring participants.

This module provides a new method.

- `postBenefitAssignment`—Update Mentoring records in Education Cloud.

See [Component Reference: Industries Education Public API](#) (can be outdated or unavailable during release preview)

### Changed Modules

These modules have new, changed, or deprecated wire adapters and JavaScript functions.

**lightning/navigation**

The `replace` property in `[NavigationMixin.Navigate](pageReference, [replace])` has changes for quick action navigation, such as when using a record create page as a page reference.

- When `replace` is `false` (default), saving a new record via a modal returns you to the previous record page. For example, if you created a contact via a quick action modal on an account record page, you're returned to the account record page that triggered the quick action.
- When `replace` is `true`, post-save navigation occurs when you save a new record. For example, if you created a new contact via a quick action modal on an account record page, you're redirected to the record page of the newly created contact after saving.

**lightning/logger (Generally Available)**

Logs messages to a new EventLogFile event type called Lightning Logger Event for use with Event Monitoring. See [Monitor Component Events with Custom Component Instrumentation API \(Generally Available\)](#)

**lightning/platformWorkspaceApi (Generally Available)**

Use the LWC Workspace API to control workspace tabs and subtabs from your custom components. To use `lightning/platformWorkspaceApi`, [enable Lightning Web Security](#). Lightning Locker doesn't support `lightning/platformWorkspaceApi`. For more information, see [Control Workspace Tabs and Subtabs \(Generally Available\)](#).

SEE ALSO:

[Component Library](#)

## New and Changed Aura Components

Build UI easily with these new and changed components.

### Changed Aura Components

This component has changed.

**lightning:navigation**

The `replace` property in `navigate(pageReference, replace)` has changes for quick action navigation, such as when using a record create page as a page reference.

- When `replace` is `false` (default), saving a new record via a modal returns you to the previous record page. For example, if you created a contact via a quick action modal on an account record page, you're returned to the account record page that triggered the quick action.
- When `replace` is `true`, post-save navigation occurs when you save a new record. For example, if you created a new contact via a quick action modal on an account record page, you're redirected to the record page of the newly created contact after saving.

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](#).

**Auth Namespace**

The Auth namespace has these new or changed classes, methods, interfaces, enums, or exceptions.

**IsvPartners Namespace**

The new IsvPartners namespace contains methods to help with AppExchange App Analytics use cases.

**ConnectApi Namespace**

The ConnectApi namespace (Connect in Apex) has new or changed classes, methods, or enums.

### [System Namespace](#)

The System namespace has these new or changed classes, methods, interfaces, enums, or exceptions.

### [CommerceOrders Namespace](#)

The CommerceOrders namespace is used to place orders with integrated pricing, configuration, and validation. It has these new classes, methods, and enums.

### [CommerceTax Namespace](#)

The CommerceTax namespace is used to manage the communication between Salesforce and an external tax engine. It has these new classes, methods, enums, and an interface.

### [PlaceQuote Namespace](#)

The PlaceQuote namespace is used to create or update quotes with pricing preferences and configuration options. It has these new classes, methods, and enums.

### [Compression Namespace \(Developer Preview\)](#)

The new Compression namespace is used to generate and extract compressed files. It has these classes and enums.

### [FormulaEval Namespace \(Developer Preview\)](#)

The new FormulaEval namespace is used to evaluate dynamic formulas in Apex. It has these classes and enums.

SEE ALSO:

[Apex: New Features](#)

## Auth Namespace

The Auth namespace has these new or changed classes, methods, interfaces, enums, or exceptions.

### New Classes

#### **Validate tokens from an external identity provider and map them to Salesforce users during the OAuth 2.0 token exchange flow**

These are highlights of some of the methods in the new `Auth.Oauth2TokenExchangeHandler` class. Use the `validateIncomingToken (appDeveloperName, appType, incomingToken, tokenType)` method to validate tokens from the identity provider, including access tokens, refresh tokens, ID tokens, SAML 2.0 assertions, and JSON Web Tokens (JWTs). Use the `getUserForTokenSubject (networkId, result, canCreateUser, appDeveloperName, appType)` method to map the incoming token's subject to a Salesforce user.

#### **Validate JSON Web Tokens (JWTs) during the token exchange flow**

These are highlights of some of the methods in the new `Auth.JWTUtil` class. Use the `parseJWTFromStringWithoutValidation (incomingJWT)` method to parse a JWT into a header, payload, and signature. Use the `validateJWTWithKeysEndpoint (incomingJWT, keysEndpoint, shouldUseCache)` method to validate a JWT with a callout to a remote JSON Web Key Set (JWKS) endpoint on your identity provider.

#### **Retrieve the result of token validation during the token exchange flow**

These are highlights of some of the methods in the new `Auth.TokenValidationResult` class. Use the `TokenValidationResult (isValid, data, userData, token, tokenType, customErrorMsg)` constructor to set up a token validation result. Use the `getUserData ()` method to get information about the user from the identity provider.

#### **Revoke or delete Salesforce-issued opaque OAuth tokens**

Use the `revokeToken (type, AuthToken)` method in the new `Auth.OauthToken` class.

## New Enums

### Specify the type of token passed from the identity provider into the

#### `OAuth2TokenExchangeHandler.validateIncomingToken` method

Use the new `Auth.OAuth2TokenExchangeType` enum.

### Specify the Salesforce app integration framework in the `OAuth2TokenExchangeHandler.validateIncomingToken` method

Use the new `Auth.IntegratingAppType` enum.

### Specify the type of OAuth token that's being revoked in the `OAuthToken.revokeToken` method

Use the new `Auth.OAuthTokenType` enum.

## New Exceptions

### Throw an exception for JWT validation errors during the token exchange flow

Use the new `Auth.JWTValidationException` exception.

## IsvPartners Namespace

The new `IsvPartners` namespace contains methods to help with AppExchange App Analytics use cases.

## New Class

### Contains methods to help with AppExchange App Analytics use cases

Use the `logCustomInteraction(interactionLabel)`, `logCustomInteraction(interactionLabel, interactionId)`, and `logCustomInteraction(interactionLabel, interactionUuid)` overload methods in the `AppAnalytics` class.

#### SEE ALSO:

[Salesforce Apex Reference Guide: IsvPartners Namespace](#)

## ConnectApi Namespace

The `ConnectApi` namespace (`Connect` in Apex) has new or changed classes, methods, or enums.

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. The `ConnectApi` namespace is referred to as *Connect in Apex*.

For the new and changed `ConnectApi` classes, methods, and enums, see [ConnectApi \(Connect in Apex\): New and Changed Classes and Enums](#).

## System Namespace

The `System` namespace has these new or changed classes, methods, interfaces, enums, or exceptions.

## New Classes

### Generate a version 4 universally unique identifier (UUID)

Use the `randomUUID()` method in the `UUID` class.

## New or Changed Methods in Existing Classes

### See improved validation in DML with external objects

There are new validation checks for non-external objects in `Database.insertImmediate()` and `Database.insertAsync()` methods.

### Explicitly release savepoints before making a desired callout

Use the new `Database.releaseSavepoint` method.

### Get the hostname for your Salesforce Setup pages

Use the new `DomainCreator.getSetupHostname()` method.

### See improved validation in Type class methods

Using an invalid namespace while calling the `Type.forName()` method now returns a null.

### Get the current unique visitor ID (UVID) for a guest user

Use the new `UserInfo.getCurrentUvid()` method.

## New Enums

### Get the execution type for all events that haven't been assigned a descriptive quiddity

Use the new `Undefined(UD)` default value in the `System.Quiddity` enum.

## Changed Enums

### Identify domains that host Salesforce Setup pages

When you parse a domain through the `System.DomainParser` class, the new `SETUP_DOMAIN` `System.DomainType` enum value represents a domain that hosts Salesforce Setup pages.

## CommerceOrders Namespace

The `CommerceOrders` namespace is used to place orders with integrated pricing, configuration, and validation. It has these new classes, methods, and enums.

## New Classes

### Set the input configuration options of the product configurator

Use the `ConfigurationOptionsInput` properties.

### Set the sObject graph values of the order payload to be ingested

Use the `GraphRequest` constructor.

### Use the Apex entry point to execute the Place Order API request

Use the `PlaceOrderExecutor` class methods.

### Get the Place Order API response

Use the `PlaceOrderResult` class properties.

### Assign values to the fields of an order item

Use the `RecordResource` constructor.

### Associate a record object with a reference identifier

Use the `RecordWithReferenceRequest` constructor.

## New Enums

### Define the product configuration input for the Place Order API request

Use the new `ConfigurationInputEnum` enum in the `ConfigurationOptionsInput` class method.

### Define the pricing preference during the create order process

Use the new `PricingPreferenceEnum` enum in the `PlaceOrderExecutor` class method.

## CommerceTax Namespace

The `CommerceTax` namespace is used to manage the communication between Salesforce and an external tax engine. It has these new classes, methods, enums, and an interface.

## New Classes

### Set the tax fields based on the external tax provider's response

Use the `AbstractTransactionResponse` class methods.

### Set the tax address fields based on the external tax engine's response

Use the `AddressesResponse` class methods.

### Set the location code that's sent from the external tax engine

Use the `AddressResponse` class method.

### Set the tax amount fields based on the external tax engine's response

Use the `AmountDetailsResponse` class methods.

### Request an external engine to calculate tax

Use the `CalculateTaxRequest` class methods.

### Set tax transaction values based on the external tax engine's response

Use the `CalculateTaxResponse` class methods.

### Get an error response from the PaymentGatewayAdapter methods of the CommercePayments namespace

Use the `ErrorResponse` class constructor.

### Get the address values that are applicable for the quote or order transaction

Use the `HeaderTaxAddressesRequest` class constructor.

### Store tax imposition details from the external tax engine

Use the `ImpositionResponse` class methods.

### Store tax jurisdiction details from the external tax engine

Use the `JurisdictionResponse` class methods.

### Store details of a list of line items on which the tax engine calculated tax

Use the `LineItemResponse` class methods.

### Store details of addresses applied to each line item in a tax calculation request

Use the `LineTaxAddressesRequest` class constructor.

### Get details of tax rules used for tax calculation

Use the `RuleDetailsResponse` class methods.

### Get and set tax address values

Use the `TaxAddressesRequest` constructor.

### Get address details used for tax calculation

Use the `TaxAddressRequest` constructor.

**Initialize details about any exceptions during the tax calculation process**

Use the `TaxApiException` constructor.

**Get customer details used in the tax calculation process**

Use the `TaxCustomerDetailsRequest` constructor.

**Store details of tax values from a tax calculation request**

Use the `TaxDetailsResponse` class methods.

**Store details about the type of a tax calculation request**

Use the `TaxEngineContext` class methods.

**Get details about the line items of a tax request**

Use the `TaxLineItemRequest` constructor.

**Initialize tax code details used in the tax calculation request**

Use the `TaxSellerDetailsRequest` constructor.

**Initialize customer details used in the tax calculation and estimation requests**

Use the `TaxTransactionRequest` constructor.

**New Interface****Get information from the tax engine and define the tax details**

Use the `TaxEngineAdapter`'s `processRequest` method to get a response with the calculated tax details.

**New Enums****Specify if a tax calculation request is for estimated or actual tax**

Use the new `CalculateTaxType` enum in the `CalculateTaxRequest` and `CalculateTaxResponse` class methods.

**Specify the type of tax request**

Use the new `RequestType` enum in the `TaxEngineContext` class method.

**Get the code that represents the tax request results**

Use the new `ResultCode` enum in the `ErrorResponse` class method.

**Specify if the tax transaction is committed or uncommitted**

Use the new `TaxTransactionStatus` enum in the `CalculateTaxResponse` class method.

**Specify if a tax transaction is for a credit or a debit transaction**

Use the new `TaxTransactionType` enum in the `CalculateTaxRequest` and `CalculateTaxResponse` class methods.

**PlaceQuote Namespace**

The `PlaceQuote` namespace is used to create or update quotes with pricing preferences and configuration options. It has these new classes, methods, and enums.

**New Classes****Set the input configuration options of the product configurator**

Use the `ConfigurationOptionsInput` properties.

**Set the sObject graph values of the quote payload to be ingested**

Use the `GraphRequest` constructor.



**Use the Apex entry point to execute the Place Quote API request**

Use the `PlaceQuoteExecutor` and `PlaceQuoteRLMApexProcessor` class methods.

**Get the exception details of the Place Quote API request**

Use the `PlaceQuoteException` class methods.

**Get the Place Quote API response**

Use the `PlaceQuoteResponse` class properties.

**Assign values to the fields of a quote**

Use the `RecordResource` constructor.

**Associate a record object with a reference identifier**

Use the `RecordWithReferenceRequest` constructor.

**New Enums****Define the product configuration input for the Place Quote API request**

Use the new `ConfigurationInputEnum` enum in the `ConfigurationOptionsInput` class method.

**Define the pricing preference during the create quote process**

Use the new `PricingPreferenceEnum` enum in the `PlaceQuoteExecutor` and `PlaceQuoteRLMApexProcessor` class method.

**Compression Namespace (Developer Preview)**

The new `Compression` namespace is used to generate and extract compressed files. It has these classes and enums.

**New Classes****Compress the zip entries and generate an Apex blob that contains the bytes of the compression operation**

Use the `getArchive()` method in the `ZipWriter` class.

**Extract bytes from a specified zip entry**

Use the `extract(ZipEntry entry)` or `extract(String name)` methods in the `ZipReader` class.

**Get information about a single file in a zip file**

Use the `getContent()`, `getName()`, `getCompressedSize()`, and other methods in the `ZipEntry` class.

**New Enums****Set the compression level when creating a zip file**

Use the new `Level` enum.

**Specify the compression method for the zip entries**

Use the new `Method` enum.

**New Exception****Catch exceptions in compression operations**

Use the new `compression.ZipException` exception.

**FormulaEval Namespace (Developer Preview)**

The new `FormulaEval` namespace is used to evaluate dynamic formulas in Apex. It has these classes and enums.

## New Classes

### Specify the formula text, return type, and context object type to build a formula

Use the `withFormula(formulaText)`, `withReturnType(returnType)`, and `withType(contextType)` methods in the `FormulaBuilder` class.

### Pass a global variable that references data in your org

Use the `withGlobalVariables(formulaGlobals)` method in the `FormulaBuilder` class.

### Indicate whether a null for a numeric value is treated as zero

Use the `treatNumericNullAsZero(treatNumericNullAsZero)` method in the `FormulaBuilder` class.

### Build and validate a formula expression

Use the `builder()` and `build()` methods in the `FormulaBuilder` class.

### Evaluate a formula expression

Use the `evaluate()` method in the `FormulaInstance` class.

## New Enums

### Specify the return type in the `withReturnType(returnType)` method

Use the new `FormulaReturnType` enum.

### Specify a global variable that references data in your org in the `withGlobalVariables(formulaGlobals)` method

Use the new `FormulaGlobal` enum.

## 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. The `ConnectApi` namespace is referred to as *Connect in Apex*.

### [New and Changed Connect in Apex Classes](#)

These classes are new and changed.

### [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 and Changed Connect in Apex Classes

These classes are new and changed.

## Chatter Feeds

These changed methods are in the `ChatterFeeds` class.

Isolated feed elements and comments are visible only to admins.

### Get the isolated feed, get feed elements from the isolated feed, get the isolated feed with feed elements, and search feed elements in the isolated feed

Some overloads of these methods support isolated feeds, posts, and comments. See the Apex Reference Guide for more information.

- `getFeed()`
- `getFeedElementsFromFeed()`
- `getFeedWithFeedElements()`
- `searchFeedElementsInFeed()`

## Commerce

These new methods are in the `ConnectApi.CommerceCart` class.

### Clone template carts so customers can check out with Pay Now

- `cloneCart(webstoreId, activeCartOrId, targetEffectiveAccountId, targetType)`

### Get cart items of a specific product

- `getProductCartItem(webstoreId, effectiveAccountId, activeCartOrId, productId, currencyIsoCode)`

New output class: `ConnectApi.ProductCartItem`

### Get cart items sorted by product ID

- `getProductCartItems(webstoreId, effectiveAccountId, activeCartOrId, pageSize, pageNumber, currencyIsoCode)`

New output class: `ConnectApi.ProductCartItemCollection`

### Preserve cart contents when a guest customer logs in

- `preserveGuestCart(webstoreId, effectiveAccountId, activeCartOrId, currencyIsoCode)`

New output class: `ConnectApi.PreserveCart`

This method is no longer in the `ConnectApi.CommerceStorePricing` class.

### REMOVED: This method isn't available to customers in any version and was removed from the documentation.

- `getProductPrices(webstoreId, effectiveAccountId, productIds)`

## Data Cloud

These new methods are in the `ConnectApi.CdpSegment` class.

### Deactivate a segment by API name

- `deactivateSegmentByApiName(segmentApiName)`

### Deactivate a segment by ID

- `deactivateSegmentById(segmentId)`

These methods were introduced in version 59.0, but were previously undocumented.

## Einstein

This new method is in the new `ConnectApi.EinsteinLLM` class.

### Generate a response using a prompt template and input parameters.

- `generateMessagesForPromptTemplate(promptTemplateDevName, promptTemplateGenerationsInput)`

New input class: `ConnectApi.EinsteinPromptTemplateGenerationsInput`

New output class: `ConnectApi.EinsteinPromptTemplateGenerationsRepresentation`

## Order Management

These new methods are in the `ConnectApi.Exchanges` class.

### Preview cart to exchange order

- `previewCartToExchangeOrder(previewCartToExchangeOrderInput)`

New input class: `ConnectApi.PreviewCartToExchangeOrderInputRepresentation`

New output class: `ConnectApi.PreviewCartToExchangeOrderOutputRepresentation`

### Submit cart to exchange order

- `submitCartToExchangeOrder(submitCartToExchangeOrderInput)`

New input class: `ConnectApi.SubmitCartToExchangeOrderInputRepresentation`

New output class: `ConnectApi.SubmitCartToExchangeOrderOutputRepresentation`

These methods are new in the `ConnectApi.OMSAnalytics` class.

### Get a page of products and their return rates

- `productsReturnRate(pageParam, pageSize)`
- `productsReturnRate(pageParam, pageSize, products)`

New output class: `ConnectApi.ProductReturnRateListOutputRepresentation`

## Salesforce CMS

These new methods are in the `ConnectApi.ManagedContent` class.

### Publish content

- `publish(publishInput)`

New input class: `ConnectApi.ManagedContentPublishInput`

New output class: `ConnectApi.ManagedContentPublishOutput`

### Unpublish content

- `unpublish(unpublishInput)`

New input class: `ConnectApi.ManagedContentUnpublishInput`

New output class: `ConnectApi.ManagedContentUnpublishOutput`

### Create managed content

- `createManagedContent(ManagedContentInputParam)`
- `createManagedContentWithMedia(ManagedContentInputParam, contentData)`

New input class: `ConnectApi.ManagedContentDocumentInput`

New output class: `ConnectApi.ManagedContentDocument`

### Replace a managed content variant

- `replaceManagedContentVariant(variantId, ManagedContentVariantInputParam)`
- `replaceManagedContentVariantWithMedia(variantId, ManagedContentVariantInputParam, contentData)`

New input class: `ConnectApi.ManagedContentVariantUpdateInput`

New output class: `ConnectApi.ManagedContentVariant`

### Delete a managed content variant

- `deleteManagedContentVariant(variantId)`

## Changed Connect in Apex Input Classes

These input classes have changes.

### Commerce

#### **ConnectApi.OCIFulfillReservationInputRepresentation**

This input class has this new property.

- `reservationId`—The ID of the inventory reservation.

#### **ConnectApi.OCIFulfillReservationSingleInputRepresentation**

This input class has this new property.

- `reservationId`—The ID of the inventory reservation.

#### **ConnectApi.OCIReleaseReservationInputRepresentation**

This input class has this new property.

- `reservationId`—The ID of the inventory reservation.

#### **ConnectApi.OCIReleaseReservationSingleInputRepresentation**

This input class has this new property.

- `reservationId`—The ID of the inventory reservation.

#### **ConnectApi.OCITransferReservationInputRepresentation**

This input class has this new property.

- `reservationId`—The ID of the inventory reservation.

#### **ConnectApi.OCITransferReservationSingleInputRepresentation**

This input class has this new property.

- `reservationId`—The ID of the inventory reservation.

### Salesforce Scheduler

#### **ConnectApi.ServiceAppointmentInput**

This input class has these new properties.

- `appointmentMode`—Mode of the service appointment.
- `attendeeLimit`—Maximum number of customers that's allowed to attend the service appointment.

## Changed Connect in Apex Output Classes

These output classes have changes.

### Commerce

#### **ConnectApi.AbstractCartItem**

This output class has this new property.

- `cartDeliveryGroupId`—ID of the delivery group.

#### **ConnectApi.CartItemCollection**

This output class has this new property.

- `currentPage`—Current page of cart items.
- `totalItemCount`—Total count of line items, of the type Product, in the cart.
- `totalNumberOfPages`—Total number of pages for the given page size.

#### **ConnectApi.CartSummary**

This output class has this new property.

- `totalProductLineItemCount`—Total count of line items, of the type Product, in the cart.

### Data Cloud

#### **ConnectApi.CdpSegmentActionOutput**

This output class has this new property.

- `segmentApiName`—API name of the segment.

This output class became a subclass of `ConnectApi.CdpActionResponse`.

The new property and the subclass change were introduced in version 59.0, but were previously undocumented.

### Salesforce CMS

#### **ConnectApi.ManagedContentSpace**

This output class has this new property.

- `isEnhancedSpace`—Specifies whether the space is enhanced (`true`) or not (`false`).

## Changed Connect in Apex Enums

These enums have changes.

For information about these enums, see `ConnectApi` Enums in the *Apex Reference Guide*.

#### **ConnectApi.CartType**

This enum has this new value.

- `PayNowReadOnly`—Clone of a Template cart that the customer can check out with using Pay Now.

#### **ConnectApi.CredentialAuthenticationProtocol**

This enum has this new value.

- `Basic`—Basic authentication.

#### **ConnectApi.CredentialAuthenticationProtocolVariant**

This enum has this new value.

- `ClientCredentialsClientSecretBasic`—OAuth 2.0 Client Credentials client secret. Client secrets are sent in the callout's authorization header, as with Basic authentication.

#### **ConnectApi.FeedEntityStatus**

This enum has this new value.

- `Isolated`—The feed post or comment is isolated, and only admins can see it.

#### **ConnectApi.FeedType**

This enum has this new value.

- `Isolated`—Contains all the feed items and comments that are isolated.

## API: New and Changed Items

Access more data objects and metadata types in API version 60.0.

### [New and Changed Objects](#)

Access more data through these new and changed standard objects.

### [New and Changed Data Model Objects](#)

Access more data groupings through these new and changed data model objects (DMOs).

### [New and Changed Standard Platform Events](#)

Receive real-time notifications from Salesforce by subscribing to the channels of these new and changed standard platform events.

### [Bulk API 2.0](#)

Query whether PK chunking is supported for an object.

### [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, retrieve events for dataflow jobs, use new forecasting and Data Cloud steps and custom component layouts in dashboards.

### [Invocable Actions](#)

Invocable Actions represent the actions that can be accomplished on Salesforce with APIs.

### [Metadata API](#)

Access more metadata through these new and changed metadata types.

### [REST API](#)

These calls are new, changed, or deprecated in Platform REST API version 60.0.

### [Tooling API New and Changed Objects](#)

Access more metadata through these new and changed Tooling API objects.

### [User Interface API](#)

Get a quick action layout for a specified record type, get lookup field suggestions with POST, and work with more objects.

### [GraphQL API](#)

Return localized labels and get locale information for an object. Avoid naming collisions with object name suffixes. Referential integrity is supported in aggregate queries. Get the number of records returned in a page of query results. Get displayable values for polymorphic fields when querying records. Switch from record connection pagination to upper-bound limit pagination to retrieve more than 4,000 records. Paginate through child relationships with an upper-bound limit.

## New and Changed Objects

Access more data through these new and changed standard objects.

### Salesforce Overall

#### **Specify whether an organization is external to the company**

Use the new `Type` field on the `InternalOrganizationUnit` object.

### Commerce

#### **Store inventory item reservation information for a specific product and location.**

Use the new `InventoryItemReservation` object.

#### **Get shipping details for a store that uses Salesforce shipping rates**

Use the new `ShippingConfigurationSet`, `ShippingRateArea`, `ShippingRateGroup`, and `StandardShippingRate` objects.

#### **Preserve cart contents when guests log in to the store**

Use the new `OptionsPreserveGuestCartEnabled` field on the `WebStore` object.

#### **REMOVED: `ProductCategoryId` field on the `ProductCategory` object is removed**

The `ProductCategoryId` field on the `ProductCategory` object is removed in API version 60.0 and later.

#### **Insert multiple product categories to the same catalog**

Use the new `ParentCategoryId` field on the `ProductCategory` object.

### Data Cloud

#### **Query the `MarketSegmentActivation` object for record count to report activated data and track data consumption and usage.**

Use the `RecordCount` field on the `MarketSegmentActivation` object. This field was introduced in API version 59.0.

### Experience Cloud

#### **REMOVED: The `ManagedContentInfo` object is removed.**

The `ManagedContentInfo` object is removed in API version 57.0 and later. Instead, use the `ManagedContent` object.

#### **Isolate feed items so they're only visible to admins**

Use the new `Isolated` value on the existing `Status` field on the `FeedItem` object.

#### **Isolate comments so they're only visible to admins**

Use the new `Isolated` value on the existing `Status` field on the `FeedComment` object.

### Field Service

#### **Show service reports are queued**

Use the new `Queued` value on the existing `Status` field on the `ServiceReport` object.

#### **Use text, audio, and video files as data for the report output for `ServiceReport`**

Use the new `audio/ogg`, `text/calendar`, `image/webp`, `audio/x-caf`, `video/3gpp2`, `image/avif`, and `video/3gpp` values on the existing `DocumentContentType` field on the `ServiceReport` object. Introduced in API version 59.0, this object has been added to the [Object Reference for the Salesforce Platform](#).

#### **Use text, audio, and video files as the data type for captured signatures**

Use the new `audio/ogg`, `text/calendar`, `image/webp`, `audio/x-caf`, `video/3gpp2`, `image/avif`, and `video/3gpp` values on the existing `DocumentContentType` field on the `DigitalSignature` object. Introduced in API version 59.0, this object has been added to the [Object Reference for the Salesforce Platform](#).



**Create document templates to generate service documents for the Document Builder feature**

Use the new `DocumentTemplate` field on the `ServiceReport` object. Introduced in API version 57.0, this object has been added to the [Object Reference for the Salesforce Platform](#).

**Choose the signature location and see the signature status on digital signatures on reports**

Use the new `SignatureIdentifier`, `SignatureStatus`, and `SignatureStatusReason` fields on the existing `DocumentRecipient` object. Introduced in API version 56.0, this object has been added to the [Object Reference for the Salesforce Platform](#).

**Determine the behavior of work capacity limit expiration**

Use the new `CapacityLimitRelaxation` field on the `WorkCapacityLimit` and `WorkCapacityUsage` objects.

**Get the ratio of the time consumed in hours to the limit (in percentage)**

Use the new `ConsumptionToLimitRatio` field on the `WorkCapacityUsage` object.

**Indicate that a work capacity limit was changed after the limit was created and provide the original limit**

Use the new `OriginalLimit` field on the `WorkCapacityUsage` object.

**Determine the date for the next recurring holiday**

Use the new `NextOccurrenceDate` field on the existing `Holiday` object. Introduced in API version 58.0, this object has been added to the [Object Reference for the Salesforce Platform](#).

**Specify templates for service documents**

Use the new `ServiceDocumentTemplate` field on the existing `Service Appointment`, `Work Order`, and `Work Order Line Item` objects. Introduced in API version 57.0, this object has been added to the [Object Reference for the Salesforce Platform](#).

**Specify templates for generating service documents from service appointments, work orders, and work order line items**

Use the new `SaDocumentTemplate`, `WoDocumentTemplate`, and `WoliDocumentTemplate` fields on the existing `Work Type` object.

**Set date range and maximum number of service appointments for offline priming of service documents**

Use the new `DaysBeforeCurrentServiceDate`, `DaysAfterCurrentServiceDate`, and `MaxNumberOfServiceAppointments` fields on the existing `Field Service Mobile Settings` object. Introduced in API version 59.0, these fields have been added to the [Object Reference for the Salesforce Platform](#).

**Identify the owner of operating hours records for sharing operating hours**

Use the new `OwnerId` field on the existing `OperatingHours` object. Introduced in API version 59.0, this field has been added to the [Object Reference for the Salesforce Platform](#).

**Translate data stored in the ServiceResource and ServiceTerritory objects**

Use the new `ServiceResourceDataTranslation` and `ServiceTerritoryDataTranslation` objects. Introduced in API version 54.0, these objects have been added to the [Object Reference for the Salesforce Platform](#).

**Revenue****See which assets are part of the same bundle**

Use the new `GroupingKey` field on the `AssetRelationship` object.

**See which component attributes are associated with a bundled product**

Use the new `ProductRelatedComponent` field on the `AssetRelationship` object.

**Create a relationship between an asset and a contract**

Use the new `AssetContractRelationship` object.

**Track invoice status with greater granularity**

Use the new `Draft`, `DraftInProgress`, and `PostingInProgress` fields on the `BillingPeriodItem` object.

**Select the pricing source when amending or renewing an asset**

Use the new `LastTransaction` or `PriceBookListPrice` values on the new `PricingSource` field on the `Asset` object.

**Sales****View the user's initial sync status and the number of contacts and events synced between Salesforce and the user's external email account**

Use the new `ContactsSynced`, `EventsSynced`, and `UserOnboardingStatus` fields on the existing `ActivityUsrConnectionStatus` object.

**Let forecast managers and forecast owners adjust forecast values**

Use the new `HasAdjustments` and `HasOwnerAdjustments` fields on the existing `ForecastingType` object.

**Specify how to group forecast totals for a forecast type**

Use the new `ForecastingGroup` and `ForecastingGroupItem` objects to identify forecast groups and their values based on custom single-selection picklists. To identify the group assigned to the forecast type, use the new `ForecastingGroupId` field on the existing `ForecastingType` object. To specify which value within a group applies to forecast data, use the new `ForecastingGroupItemId` field on the existing `ForecastingAdjustment`, `ForecastingCustomData`, `ForecastingItem`, `ForecastingOwnerAdjustment`, and `ForecastingQuota` objects.

**Specify the time frame within which to search for activities in the Account Intelligence view**

Use the new `DATE_NONE`, `LAST_90_DAYS`, `LAST_180_DAYS`, and `LAST_365_DAYS` values in the existing `DateLiteralType` field on the `PipelineInspectionListView` object.

**Specify the list view to see in the Account Intelligence view**

Use the new `MY_ACCOUNTS` and `MY_IMPORTANT_ACCOUNTS` values in the existing `ViewType` field on the `PipelineInspectionListView` object.

**Let sales reps in Lightning Experience and partner users in supported Experience Cloud sites self-enroll in a program that you share**

Use the new `DoesAllowSelfEnrollment` field on the existing `EnablementProgram` object and the new `EnrollmentType` field on the existing `LearningItemAssignment` object.

Also, use these new objects.

- `EnablementProgramOwnerSharingRule`, `EnablementProgramShare`
- `EnblProgramSection`
- `EnblProgramTaskDefinition`, `EnblProgramTaskProgress`
- `LearningItemAssignmentOwnerSharingRule`, `LearningItemAssignmentShare`
- `LearningItemOwnerSharingRule`, `LearningItemShare`
- `LearningItemProgress`, `LearningItemProgressChangeEvent`, `LearningItemProgressSharingRule`, `LearningItemProgressShare`

**Use new completion status values to track programs, milestones, and exercise progress**

Use the `NoLongerTracking` and `Overdue` values in the `ProgressStatus` field on the new `EnblProgramTaskProgress` object to track milestone and exercise progress. To track program status, use the `ProgressStatus` field on the new `LearningItemProgress` object. (The `NoLongerTracking` status doesn't apply to exercises.)

**Deliver Enablement programs, prompts, and walkthroughs to partner users in your Partner Relationship Management (PRM) site**

Use the new `PtnrEnablement` value in the existing `Type` field on the `EnablementProgram` object.

## Salesforce Flow

### **View the logging data for a FlowOrchestrationInstance, FlowOrchestrationStageInstance, or FlowOrchestrationStepInstance**

Use the new `FlowOrchestrationLog` object.

### **View the process type that integrates with Prompt Builder**

Use the new `PromptFlow` value, which is in the existing `ProcessType` field on the existing `FlowDefinitionView` and `FlowVersionView` objects.

### **View the trigger type for a capability that integrates with a flow**

Use the new `Capability` value, which is in the existing `TriggerType` field on the existing `FlowDefinitionView` object.

### **View the capability that integrates with a flow**

Use the new `CapabilityType` field on the existing `FlowVersionView` object.

### **View whether a flow runs when a user submits data via a webform**

Use the new `Form` enum value in the existing `Type` field on the existing `FlowRecord` object.

### **View the status of the flow interview when a flow version is paused**

Use the new `VersionPaused` enum value in the existing `InterviewStatus` field on the `FlowInterview` object.

### **View if a flow version is paused in a flow's interview log**

Use the new `VersionPaused` enum value in the existing `InterviewStatus` field on the existing `FlowInterviewLog` object.

### **View the number of entries in the flow**

Use the new `Entries` field on the existing `FlowRecordVersion` object.

### **View the number of errors in the flow**

Use the new `Errors` field on the existing `FlowRecordVersion` object.

### **View the number of exits from the flow**

Use the new `Exits` field on the existing `FlowRecordVersion` object.

### **Specify if the segment-triggered flow is paused**

Use the new `IsPaused` field on the existing `FlowRecord` and `FlowRecordVersion` objects.

### **View the date and time the flow was paused**

Use the new `PausedDate` field on the existing `FlowRecord` and `FlowRecordVersion` objects.

### **View the ID of the user who paused the flow**

Use the new `PausingUserId` field on the existing `FlowRecordVersion` object.

### **View the reason the flow was paused**

Use the new `ReasonPaused` field on the existing `FlowRecord` and `FlowRecordVersion` objects.

### **View the date and time the flow resumed**

Use the new `ResumedDate` field on the existing `FlowRecord` and `FlowRecordVersion` objects.

### **View the ID of the user who resumed the flow**

Use the new `ResumingUserId` field on the existing `FlowRecordVersion` object.

### **View the date and time the flow started**

Use the new `ScheduledStartDate` field on the existing `FlowRecordVersion` object.

### **View the API name of a category**

Use the new `FlowCategory` field on the existing `FlowRecord` object.

### **View the API name of a subcategory**

Use the new `FlowSubcategory` field on the existing `FlowRecord` object.

### **View the ID of the user who owns the flow**

Use the new `OwnerId` field on the existing `FlowRecord` object.

**View an instance of a recurring flow that runs on a schedule**

Use the new `FlowRecordVersionOccurrence` object.

**View a collection of fields to set up granular user permissions for access to a standard invocable action in Flow Builder**

Use the new `StandardInvocableActionType` object.

**View whether the segment-triggered flow is paused**

Use the new `isPaused` field on the existing `FlowRecord` and `FlowRecordVersion` objects.

**View whether a flow starts when the specified capability that the flow integrates with is invoked**

Use the new `Capability` enum value in the existing `Type` field on the `FlowRecord` object.

**View the language code of the invocable action**

Use the new `Language` field on the `StandardInvocableActionType` object.

**View the label for the invocable action**

Use the new `MasterLabel` field on the `StandardInvocableActionType` object.

## Salesforce Scheduler

**Relate a service appointment to an attendee**

Use the new `ServiceAppointmentAttendee`, `ServiceAppointmentAttendeeFeed`, `ServiceAppointmentAttendeeHistory`, `ServiceAppointmentAttendeeOwnerSharingRule`, and `ServiceAppointmentAttendeeShare` objects.

**Define the maximum number of appointments allowed for each time slot for a shift**

Use the new `MaxAppointments` field on the `ShiftWorkTopic` object.

**Identify an appointment as group or regular**

Use the new `AppointmentMode` field on the `ServiceAppointment` object.

**Define the number of attendees associated with the service appointment**

Use the new `AttendeeCount` field on the `ServiceAppointment` object.

**Define the maximum number of customers allowed to attend the service appointment**

Use the new `AttendeeLimit` field on the `ServiceAppointment` object.

**Define the date and time when the service appointment status changed to Checked In**

Use the new `CheckedInTime` field on the `ServiceAppointment` object.

## Search

**View search activity on a file**

Use the `FileSearchActivity` object. Introduced in API version 38.0, this object has been added to the *Object Reference for the Salesforce Platform*.

**View search activity on a Knowledge article**

Use the `SearchActivity` object. Introduced in API version 38.0, this object has been added to the *Object Reference for the Salesforce Platform*.

## Security and Identity

**See whether a connected app is enabled to issue JSON Web Token (JWT)-based access tokens**

Use the `OptionsAppIssueJwtTokenEnabled` field on the `ConnectedApplication` object. Introduced in API version 59.0, this field has been added to the *Object Reference for the Salesforce Platform*.

**See the timeout values for JWT-based access tokens that contain a unique visitor ID (UVID)**

Use the `NamedUserUvidTimeout` and `UvidTimeout` fields on the `ConnectedApplication` object. Introduced in API version 59.0, these fields have been added to the *Object Reference for the Salesforce Platform*.

**Use Basic authentication to access external systems**

Use the new `Basic` value in the existing `Protocol` field on the `ExternalDataSource` and `ExternalDataUserAuth` objects.

**Review the content security policy (CSP) directives that are impacted by an upcoming change to system-managed trusted URLs**

Use the new `CspViolation` object.

**Detect data access anomalies that are caused by guest user misconfiguration**

Use the new `GuestUserAnomalyEvent` object.

**Store the records of anomaly data access that is caused by guest user misconfiguration**

Use the new `GuestUserAnomalyEventStore` object.

**Audit and update encryption root keys store in third-party key stores**

Use the new `ExternalEncryptionRootKey` object.

**Store organization metric details for guest user anomaly events detected by Threat Detection**

Use the new `TenantSecurityGuestUserAnomaly` object.

**Link the metric count and metric drill-down in Security Center**

Use the `TenantSecurityMetricDetailLink` object. Introduced in API version 48.0, this object has been added to the *Object Reference for the Salesforce Platform*.

**Enable email template allowlisting for the Headless Forgot Password Flow**

Use the new `IsForgotPwdEmailTemplateAllowlistingEnabled` field on the existing `NetworkAuthApiSettings` object.

**Create an email template allowlist for the Headless Registration Flow, Headless Passwordless Login Flow, and Headless Forgot Password Flow**

Use the new `NetworkEmailTmplAllowlist` object.

**Set up passwordless login and registration via Universal Registration API**

Use the new `IsUniversalClientRgstrAllowed` field on the existing `NetworkAuthApiSettings` object.

**See whether the OAuth 2.0 token exchange flow is enabled**

Use the new `OptionsTokenExchangeManageBitEnabled` field on the existing `ConnectedApplication` object.

**Create an OAuth token exchange handler**

Use the new `OauthTokenExchangeHandler` and `OauthTokenExchHandlerApp` objects.

**See when an OAuth token exchange handler or SAML identity provider was used to log in a user**

Use the new `AUTHENTICATION_SERVICE_ID` field on the existing `Login` event type.

**See when a user resets their password**

Use the new supported value `UIPasswordReset` in the existing `LoginSubtype` field on the `LoginHistory` object.

Use the new supported value `uipwdrst` in the existing `LOGIN_SUB_TYPE` field on the `Login` event type.

**Service****Configure tabs and tab order in Omni Supervisor**

Use the new `OmniSupervisorConfigTab` object to customize visible tabs in Omni Supervisor.

**Assign an eligibility rule to a service catalog item**

Use the new `SvcCatalogCategoryItem` object.

**Query messages sent via the sendConversationMessages invocable action**

Use the new ConvMessageSendRequest object.

**Associate a parent record to a work plan in Incident Management and Field Service**

Use the new ParentRecordId and ParentRecordType fields on the existing WorkPlan object. Introduced in API version 54.0, these fields have been added to the *Object Reference for the Salesforce Platform*.

**Associate a work plan template to a work plan in Field Service**

Use the new WorkPlanTemplateId field on the existing WorkPlan object. Introduced in API version 54.0, this field has been added to the *Object Reference for the Salesforce Platform*.

**Define a conversation channel**

Use the new ConversationChannelDefinition object to define a conversation channel, such as a Partner Messaging channel.

**Specify Partner Messaging as the Service Cloud partner vendor system**

Use the new BringYourOwnChannelPartner value on the existing vendorType field on the ConversationVendorInfo object.

**Define a Service or Marketing connection in a Unified Messaging channel**

Use the new MessagingChannelUsage object.

**Track a Marketing connection's Enterprise ID and Business Unit in a Unified Messaging channel**

Use the new MsgChannelUsageExternalOrg object.

**Allow contact center public keys to be provisioned automatically**

Use the new CapabilitiesSupportsKeyProvisioning field on the existing ConversationVendorInfo object to manage permissions. Introduced in API version 54.0, these fields have been added to the *Object Reference for the Salesforce Platform*.

**Allow access to partner telephony phone numbers when configuring contact center channels**

Use the new CapabilitiesSupportsPartnerPhoneNumbers field on the existing ConversationVendorInfo object to manage permissions. Introduced in API version 54.0, these fields have been added to the *Object Reference for the Salesforce Platform*.

**View the name of a voice call record**

Use the new Name field on the existing VoiceCall object to determine the name of a voice call record.

**Check if an LLM was used to create a Knowledge Article**

Use the new IsGeneratedByLlm field on the existing KnowledgeArticle object.

**Check which LLM was used to create a Knowledge Article**

Use the new LargeLanguageModel field on the existing KnowledgeArticleVersion object.

## New and Changed Data Model Objects

Access more data groupings through these new and changed data model objects (DMOs).

### Salesforce Flow

**View the description of the error reason**

Use the new Error Description field on the existing Flow Element Run DMO and Flow Run DMO. Introduced in API version 59.0, this field has been added to the *Data Cloud Reference Guide* and is available in all API versions.

**View the error type when the flow run encounters an error**

Use the new Error Reason field on the existing Flow Element Run DMO and Flow Run DMO. Introduced in API version 59.0, this field has been added to the *Data Cloud Reference Guide* and is available in all API versions.

**View the ID of the instance of the scheduled segment-triggered flow associated with the flow run**

Use the new Flow Version Occurrence field on the existing Flow Run DMO.

**View the type of entity referenced by the Primary Record ID field**

Use the new Primary Record Object field on the existing Flow Run DMO. Introduced in API version 59.0, this field has been added to the *Data Cloud Reference Guide* and is available in all API versions.

## SEE ALSO:

[Salesforce Release Notes: Everything New Across Salesforce for Data Cloud](#)

[Salesforce Developer: Data Cloud Reference Guide: Standard Data Model Objects \(DMOs\)](#)

**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.

**Notify subscribers when a first bill payment is set up**

Enable B2B Commerce or D2C Commerce and make FirstBillPaymentSetupEvent available for subscribers.

**OmniStudio****Track when a user interacts with a FlexCard or OmniScript that's part of an OmniAnalytics tracking group**

Subscribe to OmniTrackingEvent to receive notifications related to user interactions.

**Revenue****Ensure users can receive event notifications for the OrderToAsset and OrderItemToAsset APIs in Subscription Management**

Update user permissions to continue to receive notifications for the CreateAssetOrderEvent and CreateAssetOrderDtlEvent platform events.

**Security, Identity, and Privacy****Receive notifications when a user unsubscribes from all communications on a preference form**

Subscribe to the new ConsentUnsubscribeAllEvent platform event.

**Bulk API 2.0**

Query whether PK chunking is supported for an object.

**Retrieve PK Chunking Supportability With a Query Instead of Referencing Documentation**

Bulk API 2.0's "Get Job Info Query" API returns a new Boolean field `isPkChunkingSupported`. This field indicates whether PK chunking is supported for the object being queried (`true`) or not (`false`). Previously, you referred to the Salesforce Bulk API 2.0 documentation to look up whether PK chunking is supported for an object.

In Winter '24, the number of objects for which PK chunking is supported in Bulk API 2.0 Query increased into the thousands. Adding this API call provides a scalable mechanism for retrieving this information easily so you don't have to look through pages of developer documentation.

**Improved Bulk API 2.0 Query Processing**

To increase job processing success, Bulk API 2.0 splits batches that have failed into smaller batches and chunk sizes. Previously, Bulk API 2.0 used a fixed chunk size. If a batch couldn't be processed, it was retried and then eventually marked as failed.

## SEE ALSO:

[Salesforce Bulk API 2.0 and Bulk API Developer Guide: Get Information About a Query Job](#)

[Salesforce Release Notes \(Winter '24\): Use Thousands of PK Chunking Enabled Objects with Bulk API 2.0](#)

## Connect REST API

Integrate mobile apps, intranet sites, and third-party web applications with Salesforce using Connect REST API.

[New and Changed Connect REST API Resources](#)

These resources are new or have changes.

[Changed Connect REST API Request Bodies](#)

These request bodies have changes.

[Changed Connect REST API Response Bodies](#)

These response bodies have changes.

### SEE ALSO:

[ConnectApi \(Connect in Apex\): New and Changed Classes and Enums](#)

[Connect REST API Developer Guide](#)

[Apex Reference Guide: ConnectApi Namespace](#)

## New and Changed Connect REST API Resources

These resources are new or have changes.

### Chatter

Isolated feed elements and comments are visible only to admins.

#### **Get the URL to the isolated feed and a page of isolated feed elements**

Make a GET request to the new `/chatter/feeds/isolated` resource.

#### **Get the URL to the isolated feed and a page of isolated feed elements in a community**

Make a GET request to the new `/connect/communities/communityId/chatter/feeds/isolated` resource.

#### **Get all the isolated feed elements and comments**

Make a GET request to the new `/chatter/feeds/isolated/feed-elements` resource.

#### **Get all the isolated feed elements and comments in a community**

Make a GET request to the new `/connect/communities/communityId/chatter/feeds/isolated/feed-elements` resource.

### Commerce

#### **Arrange cart items into delivery groups**

Make a POST request to the new `/commerce/webstores/webstoreId/carts/cartStateOrId/delivery-groups/actions/arrange-items` resource.

#### **Clone template carts so customers can check out with Pay Now**

Make a POST request to the new `/commerce/webstores/webstoreId/carts/cartStateOrId/actions/clone` resource.

#### **Get or create a list of delivery groups for a cart**

Make a GET or POST request to the new `/commerce/webstores/webstoreId/carts/cartStateOrId/delivery-groups` resource.



**Delete the payment method details from the SavedPaymentMethod object**

Make a DELETE request to the new

`/payments/merchant-accounts/merchantAccountId/saved-payment-methods/saveToken` resource.

New request parameter: `effectiveAccountId`

**Get, delete, or update a delivery group in a cart**

Make a DELETE, GET, or PATCH request to the

`/commerce/webstores/webstoreId/carts/cartStateOrId/delivery-groups/deliveryGroupId` resource.

**Get the items in a cart, sorted by product ID**

Make a GET request to the new `/commerce/webstores/webstoreId/carts/cartStateOrId/products` resource.

New response body: Product Cart Item Collection

**Get cart items of a specific product**

Make a GET request to the new

`/commerce/webstores/webstoreId/carts/cartStateOrId/products/productId` resource.

New response body: Product Cart Item

**Get inventory levels information for products in locations and location groups**

Make a GET request to the new `/commerce/inventory/levels` resource.

**Get inventory availability information for products in locations or location groups**

Make a POST request to the new `/commerce/inventory/check-availability` resource.

**Preserve cart contents when a guest customer logs in**

Make a POST request to the new

`/commerce/webstores/webstoreId/carts/cartStateOrId/actions/preserve` resource.

New response body: Preserve Cart Output

**Request a specific page number of cart items**

Make a GET request to the existing `/commerce/webstores/webstoreId/carts/cartStateOrId/cart-items` resource.

New request parameter: `pageNumber`

**Register a guest buyer for a webstore using an account ID**

Make a POST request to the new

`/commerce/webstores/webstoreId/accounts/accountId/actions/register-guest-buyer` resource.

New response body: Register Guest Buyer

**Retrieve the payment activity timeline for a payment intent**

Make a GET request to the new `/payments/payment-intents/{paymentIntentId}/timeline` resource.

New response body: List Timeline

**Save the payment method details obtained from a payment gateway in the SavedPaymentMethod object**

Make a POST request to the new `/payments/merchant-accounts/{merchantAccountId}/saved-payment-methods/saveToken` resource.

New request body: Saved Payment Method Input

New response body: Saved Payment Method Output

**Update the payment method details in the SavedPaymentMethod object**

Make a PATCH request to the new `/payments/merchant-accounts/{merchantAccountId}/saved-payment-methods/saveToken` resource.

New request parameter: `effectiveAccountId`

New response body: Saved Payment Method Output

### Use asynchronous product import

The `/commerce/management/webstores/webstoreId/product-import` resource is being removed in version 63.0. Use `/commerce/management/import/product/jobs` instead.

## Data Cloud

### Get a list of data transforms

Make a GET request to the new `/ssot/data-transforms/` resource.

New response body: Data Transform Collection Output

### Create a data transform

Make a POST request to the new `/ssot/data-transforms/` resource.

New request body: Data Transform Input

New response body: Data Transform Output

### Delete a data transform

Make a DELETE request to the new `/ssot/data-transforms/dataTransformNameOrId` resource.

### Get a data transform

Make a GET request to the new `/ssot/data-transforms/dataTransformNameOrId` resource.

New response body: Data Transform Output

### Update a new data transform

Make a PUT request to the new `/ssot/data-transforms/dataTransformNameOrId` resource.

New request body: Data Transform Input

New response body: Data Transform Output

### Cancel a data transform

Make a POST request to the new `/ssot/data-transforms/dataTransformNameOrId/actions/cancel` resource.

New response body: Data Transform Action Response Output

### Refresh the status of a data transform

Make a POST request to the new

`/ssot/data-transforms/dataTransformNameOrId/actions/refresh-status` resource.

New response body: Data Transform Action Response Output

### Retry a data transform

Make a POST request to the new `/ssot/data-transforms/dataTransformNameOrId/actions/retry` resource.

New response body: Data Transform Action Response Output

### Run a data transform

Make a POST request to the new `/ssot/data-transforms/dataTransformNameOrId/actions/run` resource.

New response body: Data Transform Action Response Output

### Get a data transform's schedule

Make a GET request to the new `/ssot/data-transforms/dataTransformNameOrId/schedule` resource.

New response body: Schedule Output

**Update a data transform's schedule**

Make a PUT request to the new `/ssot/data-transforms/dataTransformNameOrId/schedule` resource.

New request body: Schedule Input

New response body: Schedule Output

**Deactivate a segment by ID or API name**

Make a POST request to the `/ssot/segments/segmentId/actions/deactivate` resource or the `/ssot/segments/segmentApiName/actions/deactivate` resource. Introduced in API version 59.0, these resources have been added to the *Data Cloud Connect REST API Guide*.

**Create a data graph**

Make a POST request to the new `/ssot/data-graphs` resource.

New request body: Data Graph Input

New response body: Data Graph Output

**Delete a data graph**

Make a DELETE request to the new `/ssot/data-graphs/dataGraphName` resource.

**Get data graph data by lookup**

Make a GET request to the new `/ssot/data-graphs/data/dataGraphEntityName` resource.

New required request parameter: `lookupKeys`

New response body: Data Cloud Query Output

**Get data graph data by ID**

Make a GET request to the new `/ssot/data-graphs/data/dataGraphEntityName/id` resource.

New response body: Data Cloud Query Output

**Get data graph metadata**

Make a GET request to the new `/ssot/data-graphs/metadata` resource.

New response body: Data Graph Metadata Output

**Get a list of activation targets using selected filters**

Make a GET request to the new `/ssot/activation-targets` resource.

New response body: Activation Target Collection Output

**Get a specific activation target**

Make a GET request to the new `/ssot/activation-targets/activationTargetId` resource.

New response body: Activation Target Output

**Get a list of activations using specific filters**

Make a GET request to the new `/ssot/activations` resource.

New response body: Activation Collection Output

**Get a specific activation**

Make a GET request to the new `/ssot/activations/activationId` resource.

New response body: Activation Output

## Einstein

**Generate a response based on a prompt template and inputs**

Make a POST request to the new `/einstein/prompt-templates/promptTemplateDevName/generations` resource.

New request body: Einstein Prompt Template Generations Input

New response body: Einstein Prompt Template Generations

## Order Management

**Get a page of products with return rates**

Make a GET request to the new `/commerce/order-management/analytics/insights/products-return-rate` resource.

New response body: Product Return Rate List

**Creates a preview of an exchange order**

Make a POST request to the new `/commerce/order-management/exchanges/actions/preview-cart-to-exchange-order` resource.

New request body: Preview Cart to Exchange Order Input

New response body: Preview Cart to Exchange Order

**Submit and create an exchange order**

Make a POST request to the new `/commerce/order-management/exchanges/actions/submit-cart-to-exchange-order` resource.

New request body: Submit Cart to Exchange Order Input

New response body: Submit Cart to Exchange Order

## Platform

**Get a list of your custom domains**

Make a GET request to the new `/connect/custom-domain/domains` resource.

New response body: Custom Domain Collection

**Get information about a specified custom domain**

Make a GET request to the new `/connect/custom-domain/domains/domainId` resource.

New response body: Custom Domain

## OAuth Credentials

**Get OAuth credentials for all consumers associated with an external client app using the app ID**

Make a GET request to the new `/apps/oauth/credentials/appIdentifier` resource.

New response body: App OAuth Credentials Collection

**Get an OAuth consumer's key, secret, or both for an external client app with the consumer ID**

Make a GET request to the new `/apps/oauth/credentials/appIdentifier/oauthConsumerIdentifier` resource.

Optional request parameter: `part`. Specify `key`, `secret`, or `keyandsecret`. If unspecified, only the key is returned.

New response body: App OAuth Credentials

## Salesforce Files

**Get a streamed rendition of an asset file in a specific format**

Make a GET request to the existing `/connect/file-assets/fullyQualifiedName/rendition` resource.

New request parameter: `format`. Specify `jpg` or `png`. If unspecified, BMP and JPG files default to JPG, and PNG files default to PNG.

## SEE ALSO:

[Salesforce Release Notes: Data Cloud](#)

**Changed Connect REST API Request Bodies**

These request bodies have changes.

## Commerce

**OCI Fulfill Reservation Input**

This request body has this new property.

- `reservationId`—The ID of the inventory reservation.

**OCI Fulfill Reservation Single Input**

This request body has this new property.

- `reservationId`—The ID of the inventory reservation.

**OCI Release Reservation Input**

This request body has this new property.

- `reservationId`—The ID of the inventory reservation.

**OCI Release Reservation Single Input**

This request body has this new property.

- `reservationId`—The ID of the inventory reservation.

**OCI Transfer Reservation Input**

This request body has this new property.

- `reservationId`—The ID of the inventory reservation.

**OCI Transfer Reservation Single Input**

This request body has this new property.

- `reservationId`—The ID of the inventory reservation.

**Payments Intents Input**

This request body has these new properties.

- `reservationId`—Indicates whether the payment intent request is for Express checkout or not.
- `isShippingApplicable`—Indicates whether the payment intent request is for Express checkout or not.

## Salesforce CMS

**Managed Content Input**

This request body has this changed property.

- `contentBody`—This property's type is now Managed Content Body Input.

**Managed Content Variant Input**

This request body has this changed property.

- `contentBody`—This property's type is now Managed Content Body Input.

**Changed Connect REST API Response Bodies**

These response bodies have changes.

## Commerce

**Cart Item**

This response body has this new property.

- `cartDeliveryGroupId`—ID of the delivery group.

**Cart Item Collection**

This response body has these new properties.

- `currentPage`—Current page of cart items.
- `totalItemCount`—Total number of unique products in the cart.
- `totalNumberOfPages`—Total number of pages for the given page size.

**Cart Item Without Price**

This response body has this new property.

- `cartDeliveryGroupId`—ID of the delivery group.

**Cart Summary**

This response body has this new property.

- `totalProductLineItemCount`—Total count of line items, of the type Product, in the cart.

**Delivery Group**

This response body has these new properties.

- `cartId`—ID of the cart.
- `cartItems`—List of cart items..
- `isDefault`—List of cart items.
- `name`—ID of the delivery group..

## Lists

**List Share**

This response body has this new property.

- `apiName`—API name for the group or role.

## Salesforce CMS

**Managed Content Space**

This response body has this new property.

- `isEnhancedSpace`—Specifies whether the space is enhanced (`true`) or not (`false`).

## CRM Analytics REST API

Using the CRM Analytics REST API, retrieve events for dataflow jobs, use new forecasting and Data Cloud steps and custom component layouts in dashboards.

### [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.

### **Delete a template mapping**

Make a DELETE request to the new `/wave/template/mappings` resource.

Request parameters: `datasetDmoMappingId`

### **Use the new CDP Step in dashboards**

Make a GET request to the `/wave/dashboards/dashboardIdOrApiName` resource.

Response body includes new Cdp Step representation.

### **Create new CDP Steps in dashboards**

Make a POST request to the `/wave/dashboards` resource or a PATCH request to `/wave/dashboards/dashboardIdOrApiName` resource.

Request body includes the new Cdp Step Input representation.

### **Use the new Custom Component Layout in dashboards**

Make a GET request to the `/wave/dashboards/dashboardIdOrApiName` resource.

Response body includes the new Custom Component Layout and Custom Component Layout Variable representations.

### **Use the new Forecasting Step in dashboards**

Make a GET request to the `/wave/dashboards/dashboardIdOrApiName` resource.

Response body includes the new Forecasting Step and Forecasting Step Query representations.

### **Create new Forecasting Step in dashboards**

Make a POST request to the `/wave/dashboards` resource or a PATCH request to `/wave/dashboards/dashboardIdOrApiName` resource.

Request body includes the new Forecasting Step Input and Forecasting Step Query Input representations.

### **Use the new Interaction Reset Action in dashboards**

Make a GET request to the `/wave/dashboards/dashboardIdOrApiName` resource.

Response body includes the new Interaction Reset Action representation.

### **Create new Interaction Reset Action in dashboards**

Make a POST request to the `/wave/dashboards` resource or a PATCH request to `/wave/dashboards/dashboardIdOrApiName` resource.

Request body includes the new Interaction Reset Action Input representation.

## Changed CRM Analytics REST API Request Bodies

These request bodies have changes.

### Dataset Dmo Mapping Input

The request body has this new property.

- `datasetConversion` — The conversion metadata for the dataset.

### Replicated Dataset Input

The request body has this new property.

- `parquetOutputEnabled` — Indicates whether to provide output in Parquet format (`true`) or not (`false`).

### Text Widget Parameters Input

The request body has this new property.

- `textOverflow` — The scaling measure. Valid values are `Truncate` and `Wrap`.

## Changed CRM Analytics REST API Response Bodies

These response bodies have changes.

### Analytics Asset

The response body has this new property.

- `owner` — The owner of the asset.

### Dataflow Job

The response body has this new property.

- `events` — A collection of job events.

### Dataset Dmo Mapping

The response body has this new property.

- `datasetConversion` — The conversion metadata for the dataset.

### Replicated Dataset

The response body has this new property.

- `parquetOutputEnabled` — Indicates whether to provide output in Parquet format (`true`) or not (`false`).

### Template Validate

The response body has this new property.

- `state` — A map of the context values containing results from the validation call.

### Text Widget Parameters

The response body has this new property.

- `textOverflow` — The scaling measure. Valid values are `Truncate` and `Wrap`.

### Variable Tile Item

The response body has this new property.

- `visibility` — The visibility expression for the tile.

### Wave Features

The response body has this new property.



- `canUseJSLayOutOnMobile` — Indicates whether the org has JavaScript layouts for dashboards on mobile enabled (`true`) or not (`false`).
- `orgHasTableauSeamlessAuth` — Indicates whether the org has seamless authorization for Tableau enabled (`true`) or not (`false`).

### Wave Folder Share

The response body has this new property.

- `uniqueName` — The unique name of the entity that the folder is shared with, only applicable to the user.

## Invocable Actions

Invocable Actions represent the actions that can be accomplished on Salesforce with APIs.

Invocable actions are available through REST API. The following action has changed:

### Get items in a cart

Use the new `getCartItems` action.

### Get promotions associated with a cart

Use the new `getCartPromotions` action.

### Preview an exchange order

Use the new `previewCartToExchangeOrder` action.

### Submit an exchange order

Use the new `submitCartToExchangeOrder` action.

### Generate a response for a prompt template

Use the new `generatePromptResponse` action.

### Create a service document from a service appointment, work order, or work order line item

Use the new `createServiceDocument` action.

### Initiate natural language processing of text using the service specified in the related AI Natural Language Process Result record

Use the new `initiateNaturalLangProcessing` action.

For more information on invocable actions, see the [Actions Developer's Guide](#).

## Metadata API

Access more metadata through these new and changed metadata types.

### Customization

#### Enable natural language search for Einstein Search


Use the new `enableEinsteinSearchNaturalLanguage` field on the existing `SearchSettings` metadata type. Introduced in API version 50.0, this field has been added to the *Metadata API Developer Guide*.

#### Enable the Einstein Search experience

Use the new `enableEinsteinSearchAssistantDialog` field on the existing `SearchSettings` metadata type. Introduced in API version 50.0, this field has been added to the *Metadata API Developer Guide*.

#### Create and manage user access policies through an improved user interface (beta)

Use the new `enableEnhcUiUserAccessPolicies` field on the existing `UserManagementSettings` metadata type.

 **Note:** This feature is a Beta Service. Customer can opt to try such a 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 a quick action's standard label for patient details

Use the new `PatientDetails` enum value of the `standardLabel` field on the existing QuickAction metadata type. Introduced in API version 57.0, this enum value is added to the *Metadata API Developer Guide*.


## Development

### Disable the collection of AppExchange App Analytics usage data on installed managed packages in your org

Use the new `enableAppAnalyticsOptOut` field on the AppAnalyticsSettings metadata type.

### Store configuration options for a Pub/Sub API managed event subscription (beta)

Use the new ManagedEventSubscription metadata type.

 **Note:** This feature is a Beta Service. Customer can opt to try such a 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](#).

## Einstein

### Create and manage prompt templates

Use the new GenAIPromptTemplate and GenAIPromptTemplateActv metadata types. To send prompt template configurations from one Salesforce org to another, use change sets.

### Process text using the AI service in related Salesforce record

Use the new `initiateNaturalLangProcessing` value in the existing `actionType` field, which is on the FlowActionCall subtype of the Flow metadata type.

### Specify a session timeout limit for a bot

Use the new `sessionTimeout` on the existing Bot metadata type. Introduced in API version 58.0, this field has been added to the *Metadata API Developer Guide*.

### Use conditional logic in bot steps

Use the new `conditionLogicType` on the existing BotStep subtype of the BotVersion metadata type. Introduced in API version 58.0, this field has been added to the *Metadata API Developer Guide*.

### Define a messaging component for a bot variable operation

Use the new `messageDefinition` on the existing BotVariableOperation subtype of the BotVersion metadata type. Introduced in API version 58.0, this field has been added to the *Metadata API Developer Guide*.

## Enablement and Guidance

### Enable Learning Paths in your org's Lightning Experience configuration

Use the `enableInAppLearning` field on the existing LightningExperienceSettings metadata type. Introduced in API version 54.0, this field has been added to the *Metadata API Developer Guide*.

## Outcome Management

### Define the ID of an indicator performance period record that Outcome Management uses to calculate results

Use the new `IndicatorResultFlow` value in the existing `processType` field on the Flow metadata type.

## Salesforce Flow

### **Publish a content variant in a Salesforce CMS workflow**

Use the new `managedContentPublishVariant` value, which is in the existing `actionType` field on the existing Flow metadata type. Introduced in API version 59.0, this value has been added to the *Metadata API Developer Guide*

### **Unpublish a content variant in a Salesforce CMS workflow**

Use the new `managedContentUnpublishVariant` value, which is in the existing `actionType` field on the existing Flow metadata type. Introduced in API version 59.0, this value has been added to the *Metadata API Developer Guide*

### **Set the lock status of a content variant in a Salesforce CMS workflow**

Use the new `managedContentVariantSetLockStatus` value, which is in the existing `actionType` field on the existing Flow metadata type. Introduced in API version 58.0, this value has been added to the *Metadata API Developer Guide*

### **Set the ready status of a content variant in a Salesforce CMS workflow**

Use the new `managedContentVariantSetReadyStatus` value, which is in the existing `actionType` field on the existing Flow metadata type. Introduced in API version 58.0, this value has been added to the *Metadata API Developer Guide*

### **Assign a content variant to a role in a Salesforce CMS workflow**

Use the new `managedContentRoleStepInteractive` value, which is in the existing `actionType` field on the existing Flow metadata type. Introduced in API version 58.0, this value has been added to the *Metadata API Developer Guide*

### **Run an event-triggered flow as the triggering user or the default workflow user**

Use the new `flowRunAsUser` field on the existing FlowStart metadata subtype of the Flow metadata type to specify the user.

### **Resume flows after engagement events**

Use the new `associatedElement`, `filters`, `filterlogic`, `object`, and `recordTriggerType` fields on the existing FlowWaitEvent metadata subtype of the Flow metadata type.

### **Sum or count aggregated data in the Transform element (beta)**

Use the new `inputParameters` field, which is on the existing FlowTransformValueAction subtype of the existing FlowTransformValue subtype.

### **Specify a flow that integrates with Prompt Builder**

Use the new `PromptFlow` value in the existing `processType` field on the Flow metadata type.

### **Pass data between a flow and capability**

Use the new `capabilityTypes` field on the existing FlowStart subtype of the Flow metadata type.

### **View when a unified individual can join a flow**

Use the new `entryType` field on the existing FlowStart subtype of the Flow metadata type.

### **Specify whether to republish the segment and update segment membership before the flow runs or on the segment's Data Cloud publish schedule**

Use the new `publishSegment` field on the existing FlowStart subtype of the Flow metadata type.

### **Generate a response for a prompt template**

Use the new `generatePromptResponse` value in the existing `actionType` field, which is on the existing FlowActionCall subtype of the Flow metadata type.

## Security and Identity

### **Enable the OAuth 2.0 token exchange flow for a connected app**

Use the new `isTokenExchangeEnabled` and `isSecretRequiredForTokenExchange` fields on the existing ConnectedAppOAuthConfig subtype of the ConnectedApp metadata type.

### **Customize token validation and subject mapping during the OAuth 2.0 token exchange flow**

Use the new `OauthTokenExchangeHandler` metadata type.

**Enable refresh token rotation for a connected app**

Use the new `isRefreshTokenRotationEnabled` field on the existing `ConnectedAppOAuthConfig` subtype of the `ConnectedApp` metadata type.

**Control enablement, access, and security for headless identity flows**

Use the new `NetworkAuthApiSettings` subtype of the existing `Network` metadata type.

**Create an email template allowlist for the headless registration, passwordless login, and forgot password flows**

Use the new `NetworkEmailTplAllowlist` subtype of the existing `Network` metadata type.

**BEHAVIOR CHANGE: The values of the `consumerKey` and `consumerSecret` fields for the Twitter authentication provider are replaced with placeholder values**

For an `AuthProvider` metadata type where the `providerType` is `Twitter`, if no `consumerKey` and `consumerSecret` are defined, they're replaced with the value `Placeholder_Value`. Previously, these values were blank if you used the Salesforce-managed app for the Twitter authentication provider, but the Salesforce-managed app is being retired in Spring '24. This change also affects change sets, named credentials, and external data source packages that include a Twitter authentication provider that uses the Salesforce-managed app. To keep using a Twitter authentication provider, create your own Twitter app and update your `AuthProvider` definition with the app's `consumerKey` and `consumerSecret`.

**Manage your external client app with JWT bearer flow, device flow, or client credentials flow**

Use the new `certificate` field on the existing `ExtlClntAppGlobalOAuthSettings` metadata type to configure the OAuth 2.0 JWT bearer flow.

Use the new `isDeviceFlowEnabled` field on the existing `ExtlClntAppGlobalOAuthSettings` metadata type to configure the OAuth 2.0 device flow.

Use the new `isClientCredentialsFlowEnabled` field on the existing `ExtlClntAppGlobalOAuthSettings` metadata type along with the new `clientCredentialsFlowUser` and `isClientCredentialsFlowEnabled` fields on the existing `ExtlClntAppOAuthConfigurablePolicies` metadata type to configure the OAuth 2.0 client credentials flow.

**Rotate your external client app refresh token**

Use the new `isRefreshTokenRotationEnabled`, `isTokenExchangeEnabled`, and `isSecretRequiredForTokenExchange` fields on the existing `ExtlClntAppGlobalOAuthSettings` metadata type to enable refresh token rotation.

**Enable access to external credential principals on permission sets**

Use the new `PermissionSetExternalCredentialPrincipalAccess` subtype of the existing `PermissionSet` metadata type. Introduced in API version 59.0, this subtype has been added to the *Metadata API Developer Guide*.

**Disable all external client app plug-ins or only the OAuth plug-in**

Use the `isEnabled` and `isOAuthPluginEnabled` fields on the new `ExtlClntAppConfigurablePolicies` metadata type to disable or enable plug-ins.

**DEPRECATED: The `enableXssProtection` field on the `SecuritySettings` metadata API type is deprecated in API version 60.0**

Instead, use the `CSPTtrustedSite` metadata type.

**Service****Enable Customer Service Incident Management and Related Broadcast Communications Alerts**

Use the new `IncidentMgmtSettings` metadata type. Introduced in API version 54.0, this type has been added to the *Metadata API Developer Guide*.

**Create your own Omni Supervisor tabs**

Use the new `OmniSupervisorPageType` value in the existing `type` field on the `FlexiPage` metadata type.

**Configure the Omni Supervisor tab layout**

Use the new `OmniSupervisorConfigTab` subtype of the `OmniSupervisorConfig` metadata type.

**Add a branding set to your Embedded Service deployment**

Use the new `branding` field on the `EmbeddedServiceConfig` metadata type. Introduced in API version 52.0, this field has been added to the *Metadata API Developer Guide*.

**REMOVED: `customMinimizedComponent` field on the `EmbeddedServiceConfig` metadata type is removed**

The field is removed in API version 45.0.

**Use the Embedded Messaging conversation type for your Embedded Service deployment**

Use the new `EmbeddedMessaging` enum value of the `deploymentFeature` field on the `EmbeddedServiceConfig` metadata type. Introduced in API version 52.0, this enum value has been added to the *Metadata API Developer Guide*.

**Configure Field Service settings for your Embedded Service deployment**

Use the new `EmbeddedServiceAppointmentSettings` subtype on the `EmbeddedServiceConfig` metadata type. Introduced in API version 46.0, this subtype has been added to the *Metadata API Developer Guide*.

**Specify a layout for your Field Service deployment of Embedded Service**

Use the new `EmbeddedServiceLayout` and `EmbeddedServiceLayoutRule` subtypes on the `EmbeddedServiceConfig` metadata type. Introduced in API version 44.0, these subtypes have been added to the *Metadata API Developer Guide*.

**Specify Terms and Conditions properties for your Embedded Service deployment**

Use the new `isTermsAndConditionsEnabled` and `isTermsAndConditionsRequired` fields on the `EmbeddedServiceConfig` metadata type. Introduced in API version 59.0, these fields have been added to the *Metadata API Developer Guide*.

**Define a conversation channel**

Use the new `ConversationChannelDefinition` metadata type to define a conversation channel, such as a Partner Messaging channel.

**Specify a skill type for a skill used for field service or to route chats to agents in Chat**

Use the new `skillType` field on the `ConversationChannelDefinition` metadata type. Introduced in API version 58.0, these fields have been added to the *Metadata API Developer Guide*.

**Choose the Embedded Messaging type for the channel menu item for the Embedded Service menu settings**

Use the new `EmbeddedMessaging` enum value of the `channelType` field on the `EmbeddedServiceMenuItem` subtype of the `EmbeddedServiceMenuSettings` metadata type. Introduced in API version 58.0, these fields have been added to the *Metadata API Developer Guide*.

**Sales****Show forecast adjustment details in side-by-side columns**

Use the new `allowExpandedColumns` on the existing `ForecastingSettings` metadata type. Introduced in API version 60.0, this field has been added to the *Metadata API Developer Guide*.

**BEHAVIOR CHANGE: Twitter/X and YouTube access is no longer available in Social Accounts, Contacts, and Leads**

The `isTwitterSocialProfilesDisabled` and `isYouTubeSocialProfilesDisabled` fields are permanently set to True because access to the Twitter/X and YouTube APIs is no longer available. Twitter/X access was removed in API version 59.0 and YouTube access is revoked in version 60.0.

**REST API**

These calls are new, changed, or deprecated in Platform REST API version 60.0.

## New Types

### Specify the DateTime result type in REST API composite subrequests

The DateTime result type is now available for referencing in composite subrequests, allowing the DateTime field to be returned and referenced in later subrequests. This newly supported type joins String, Boolean, Byte, Character, Short, Integer, Long, Double, and Float as referenceable types.

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

## New Headers

### Update the Most Recently Used (MRU) items in the Recent Items section

Use the MRU header in the REST API. When you create, update, upsert, or retrieve a record, indicate whether to update the MRU items. MRU items are shown in the Recent Items section of the sidebar in the Salesforce user interface. This header provides similar functionality as the [MruHeader](#) in SOAP API.

## Changed Headers

### BEHAVIOR CHANGE: Apex REST API HTTP ACCEPT headers now default to JSON

When Apex REST API accesses Apex classes, Apex REST API now behaves like all other Salesforce APIs and returns JSON format by default when receiving a missing or malformed HTTP ACCEPT header.

Valid values for HTTP ACCEPT headers specifying a response body's content type are `application/json` or `application/xml` and are case sensitive. For Apex classes in API version 59.0 and earlier, Apex REST API returns an error for missing or malformed HTTP ACCEPT content types such as `application/xml`. All other Salesforce REST APIs default to a JSON response body format when receiving a missing or malformed HTTP ACCEPT content type.

## Tooling API New and Changed Objects

Access more metadata through these new and changed Tooling API objects.

## Development

### Store configuration options for a Pub/Sub API managed event subscription (beta)

Use the new `ManagedEventSubscription` 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](#).

### Provide the ID of the public group consisting of users who can access the sandbox

Use the new `ActivationUserGroupId` field on the existing `SandboxInfo` and `SandboxProcess` objects.

## Salesforce Flow

### View the process type that integrates with Prompt Builder

Use the new `PromptFlow` value in the existing `ProcessType` field on the existing Flow object.

## Security and Identity

### Query changes to your custom domains

Use the `DomainProvision` object. Introduced in API version 50.0, this object has been added to the *Tooling API Reference and Developer Guide*.

## Service

### Create your own Omni Supervisor tabs

Use the new `OmniSupervisorPageType` value in the existing `Type` field on the FlexiPage object.

### Define a conversation channel

Use the new `ConversationChannelDefinition` object to define a conversation channel, such as a Partner Messaging channel.

### Specify if the Terms and Conditions are enabled and required for a Embedded Service deployment

Use the new `isTermsAndConditionsEnabled` and `isTermsAndConditionsRequired` fields on the `EmbeddedServiceConfig` object. Introduced in API version 59.0, these fields have been added to the *Tooling API Developer Guide*.

## User Interface API

Get a quick action layout for a specified record type, get lookup field suggestions with POST, and work with more objects.

### [New and Changed User Interface API Resources](#)

These resources are new or have changes.

### [Changed User Interface API Response Bodies](#)

These response bodies have changes.

### [Supported Objects](#)

All new standard objects are auto-enabled for use with User Interface API.

## SEE ALSO:

[User Interface API Developer Guide](#)

## New and Changed User Interface API Resources

These resources are new or have changes.

### Actions

#### Get a quick action layout for a specified record type, such as person accounts

Make a GET request to the existing `/ui-api/actions/layout/{actionApiName}` resource.

New optional parameters: `objectApiName`, `recordTypeId`

### Records

#### Get lookup field suggestions with POST

Make a POST request to the existing `/ui-api/lookups/{objectApiName}/{fieldApiName}` resource.

Previously, you could make a GET request to the same resource. Now, you can make a POST request for lookup field suggestions.

The POST request allows sending dependent lookup values through the `sourceRecord` request body parameter, which is a more secure way of transferring data.

#### Get the correct status code if you lose access to a record during creation or update

Make a POST request to the existing `/ui-api/records` resource.

Make a PATCH request to the existing `/ui-api/records/{recordId}` resource.

New optional request parameter: `handleOwnerChange`

When set to `true`, the resource returns a `204 No Content` HTTP status code if the context user loses access to the record during creation or update. The default is `false`. When `false`, if the context user loses access to the record during creation or update, the process completes successfully, however the resource returns an incorrect `404 Not Found` HTTP status code.

## Changed User Interface API Response Bodies

These response bodies have changes.

### Apps

#### App

This response body has this new property.

- `isOmniPinnedViewEnabled`—Indicates whether the Omni-Channel sidebar is enabled.

### Records

#### Field

This response body has these new properties.

- `externalId`—External ID of the field.
- `maskType`—Mask type of the field.

#### Object Info

This response body has these new properties.

- `compactLayoutable`—Indicates whether the object can have compact layouts.
- `searchLayoutable`—Indicates whether the object can have search layouts.

## 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 usage.

To view new objects that are auto-enabled for User Interface API, see [New and Changed Objects](#).

These standard objects aren't new to your org but are new for User Interface API.

- `ActivityMetric`
- `ContentFolderItem`
- `ContentFolderLink`
- `EmailMessage`
- `EnablementProgram`
- `FeedItem`
- `LearningItem`
- `LearningItemAssignment`



- PriceAdjustmentTier

## SEE ALSO:

[User Interface API Developer Guide: Send a Request Using Postman](#)

[User Interface API Developer Guide: Supported Objects](#)

## GraphQL API

Return localized labels and get locale information for an object. Avoid naming collisions with object name suffixes. Referential integrity is supported in aggregate queries. Get the number of records returned in a page of query results. Get displayable values for polymorphic fields when querying records. Switch from record connection pagination to upper-bound limit pagination to retrieve more than 4,000 records. Paginate through child relationships with an upper-bound limit.

### Return localized labels and get locale information for an object

Query `objectInfos` with the new `locale` argument to request the object's labels using a locale. The locale defaults to the user's locale.

```
type UIAPI {
  query: RecordQuery
  objectInfos(apiNames: [String!]!, locale: String): [ObjectInfo!]
}
```

In addition, the `ObjectInfo` type has a new `locale` field, which returns the locale of the object's labels. The locale defaults to the user's locale. Otherwise, it returns the locale that you specify using the `locale` argument.

### Avoid name collisions with object name suffixes

Supported sObjects that are added in API v60.0 and later map to GraphQL object names with a `_Record` suffix. For example, `FeedItem` is added in API v60.0 and maps to a GraphQL object type named `FeedItem_Record`.

The node field of the `RecordEdge` type for sObjects that are added in API v60.0 and later follows the same pattern. That is, the `FeedItemEdge` node type name is `FeedItem_Record`.

### Referential integrity is available in aggregate queries

References to objects and fields in aggregate queries validate correctly even when the objects and fields are renamed. Previously, referential integrity wasn't supported in aggregate queries.

### Get the number of records returned in a page of query results

The `RecordConnection` type has a new `pageResultCount` field that returns the number of records in a page of results. The `totalCount` continues to return the total number of records queried.

```
{
  uiapi {
    query {
      Account(first: 4) {
        totalCount
        pageResultCount
        edges {
          node {
            Id
          }
        }
      }
    }
  }
}
```

### Get displayable values for polymorphic fields when querying records

To get the displayable values for fields, including polymorphic fields, query the `DisplayValue` field on the `Record` interface. Previously, polymorphic fields returned `null` for `DisplayValue`. Querying `DisplayValue` for multiple polymorphic fields requires additional processing time.

### Switch from record connection pagination to upper-bound limit pagination to retrieve more records

With record connection pagination you can retrieve up to 4,000 records. If you start querying with record connection pagination and discover that you need to retrieve more than 4,000 records, you can switch to upper-bound limit pagination. Use the returned cursor information from the initial query and send another query with the `upperBound` argument. Previously, the `upperBound` argument was required in the initial record query.

Here's an example of initially querying a batch of 2,000 accounts using the `first` argument.

```
{
  uiapi {
    query {
      Account(first:2000) {
        totalCount
        pageInfo {
          hasPreviousPage
          hasNextPage
          startCursor
          endCursor
        }
        edges {
          cursor
          node {
            Id
          }
        }
      }
    }
  }
}
```

Here's the result of the query with simple record connection pagination.

```
{
  "data": {
    "uiapi": {
      "query": {
        "Account": {
          "totalCount": 4087,
          "pageInfo": {
            "hasPreviousPage": false,
            "hasNextPage": true,
            "startCursor": "djE6MA==",
            "endCursor": "djE6MTk5OQ=="
          },
          "edges": [
            {
              // cursor and node properties removed for brevity
            }
          ]
        }
      }
    }
  }
}
```

```

    }
  }
}

```

Then we query the next batch of results using the `first`, `after`, and `upperBound` arguments, switching to upper-bound limit pagination. The `after` argument uses the `endCursor` value from the result of the first query. The `upperBound` argument specifies the limit for the number of records to retrieve. Even though the initial query requested a batch of 2,000 records, the subsequent upper-bound limit pagination allows the query to return up to 5,000 records.

```

{
  uiapi {
    query {
      Account(first:2000, after:"djE6MTk5OQ==", upperBound:5000) {
        totalCount
        pageInfo {
          hasPreviousPage
          hasNextPage
          startCursor
          endCursor
        }
        edges {
          cursor
          node {
            Id
          }
        }
      }
    }
  }
}

```

Then you can make subsequent queries using `first` and `after` arguments to page through more results up to the upper-bound limit.

### Paginate through child relationships with an upper-bound limit

You can page through child records by querying a parent record with an `upperBound` argument. When the parent query uses the `upperBound` argument, the child query must use this argument as well. You can also page through child records using the `upperBound` argument when the parent query doesn't use the `upperBound` argument. Paging on the parent and child records at the same time isn't supported. Paging through child relationships with large upper-bound limits can have performance implications.

SEE ALSO:

[GraphQL API Developer Guide](#)

## Einstein

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Supercharge your workforce efficiency with predictive and generative AI.

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### Einstein Features

Learn more about how Einstein can supercharge productivity across all Salesforce clouds. Einstein features are released as often as monthly, so check back again soon for the latest AI solutions. Features included in the January monthly release generally become available when Spring '24 rolls out to your org.

### Einstein Platform

Build smart solutions for your business cases with generative AI, predictive AI, and everything in between. Learn about functionality, security, and performance improvements to AI at Salesforce. Einstein platform changes are released as often as monthly, so check back again soon for the latest and greatest.

## Einstein Features

Learn more about how Einstein can supercharge productivity across all Salesforce clouds. Einstein features are released as often as monthly, so check back again soon for the latest AI solutions. Features included in the January monthly release generally become available when Spring '24 rolls out to your org.

Cloud	Features	Release Note
<b>May '24</b>		
Sales	Einstein Copilot: Close Plan	<a href="#">Take the Next Best Step to Close More Deals</a>
Sales	Einstein Copilot: Find Similar Opportunities	<a href="#">Learn Best Practices from Similar Won Deals</a>
Sales	Einstein Copilot: Meeting Follow-Up Email	<a href="#">Reengage Customers with a Post-Call Email</a>
<b>April '24</b>		
Sales	Forecast Guidance	<a href="#">Identify Risky Deals in Your Seller's Forecast</a>
Service	Knowledge Creation	<a href="#">Use Einstein Knowledge Creation in More Languages</a>
<b>March '24</b>		
Data Cloud	Einstein Segments	<a href="#">Reach the Right Audiences with Einstein Segment Creation</a> (Now Generally Available)
Field Service	Pre-Work Brief	<a href="#">Get Your Mobile Workers Up to Speed with Pre-Work Brief</a>
Sales	Call Explorer	<a href="#">Ask Call Questions with Call Explorer Powered by Einstein</a> (Now Available in Einstein Copilot)
Service	Service Replies	<a href="#">Use Service Replies for Email in More Languages</a> (Generally Available)
<b>February '24</b>		
Sales	Sales Emails	<a href="#">Get More Options with Custom Sales Email Templates</a>
Service	Generative AI Surveys	<a href="#">Einstein for Feedback Management</a>
Service	Knowledge Creation	<a href="#">Grow Your Knowledge Base with Generative AI</a> (Generally Available)

Cloud	Features	Release Note
Service	Work Summaries	<a href="#">Close Cases More Efficiently with Work Summaries in Einstein Copilot (Beta)</a>
Service	Work Summaries	<a href="#">Use Work Summaries for Messaging Channels in More Languages</a>
Marketing Cloud Growth	Co-Create with Einstein	<a href="#">Generate Campaigns and Segments with Einstein AI</a>
Marketing Cloud Account Engagement	Einstein Assistant	<a href="#">Generate Content with Einstein in Account Engagement</a>
<b>January '24</b>		
Commerce	Concierge, Einstein Return Insights, Page Meta Tags, Smart Promotions, and more	<a href="#">Commerce Einstein</a>
Data Cloud	Einstein Segments	<a href="#">Reach the Right Audiences with Einstein Segment Creation</a>
Einstein Search	Einstein Search, Search Answers	<a href="#">Einstein Search</a>
Industries	Contracts AI	<a href="#">Contracts AI</a>
Platform	Einstein for Formulas	<a href="#">Get a Natural-Language Explanation of Your Formulas</a>
Sales	Call Explorer, Call Summaries	<a href="#">Einstein Conversation Insights</a>
Sales	Contact Suggestions	<a href="#">Spend Less Time Finding New Contacts with Einstein Suggestions</a>
Sales	Einstein Activity Capture, Sales Emails	<a href="#">Sales Cloud Einstein</a>
Service	Einstein Conversation Mining, Service Replies, Work Summaries	<a href="#">Einstein for Service</a>
Service	Work Summaries	<a href="#">Wrap Up Call and Enhanced Messaging Sessions Faster with Einstein Work Summaries</a>

## Einstein Platform

Build smart solutions for your business cases with generative AI, predictive AI, and everything in between. Learn about functionality, security, and performance improvements to AI at Salesforce. Einstein platform changes are released as often as monthly, so check back again soon for the latest and greatest.

In May's release, Einstein Copilot end users get a new welcome screen and flagging for toxic responses. Prompt Builder makes it easier to troubleshoot with improved error messages and makes it easier to ground prompts in relevant data with Record Snapshot.

In March's release, get an analytics dashboard for Einstein Copilot.

In February's release, Einstein Copilot makes its debut and Prompt Builder becomes generally available. Plus, updates to the Einstein trust layer, feedback and audit data enhancements, and expanded edition support.

### [Einstein Bots](#)

Improve your NLP bots with the cross-lingual intent model and get additional languages in beta. Save service agents' time with new messaging components for enhanced bots. Help bots that use the cross-lingual intent model understand customers better by turning on disambiguation. And easily send your customers dynamic files using an enhanced bot.

### [Einstein Copilot](#)

Bring the power of conversational AI to your business with Einstein Copilot.

### [Einstein Studio in Data Cloud](#)

With Einstein Studio in Data Cloud, you can create your own predictive AI models, bring in predictions from models in Databricks, and connect to generative AI large language models (LLMs) from OpenAI and Azure Open AI. Use your AI models in batch transforms, flow actions, and Prompt Builder. Learn more about Einstein Studio in the Data Cloud release notes.

### [Einstein Trust Layer](#)

The Einstein Trust Layer elevates the security of generative AI at Salesforce through data and privacy controls that are integrated into the end-user experience.

### [Prompt Builder](#)

Prompt Builder is generally available.

### [Other Changes](#)

Enjoy expanded Einstein generative AI support for languages.

## Einstein Bots

Improve your NLP bots with the cross-lingual intent model and get additional languages in beta. Save service agents' time with new messaging components for enhanced bots. Help bots that use the cross-lingual intent model understand customers better by turning on disambiguation. And easily send your customers dynamic files using an enhanced bot.

### [Teach Your Bot New Languages More Easily with the Cross-Lingual Intent Model \(Generally Available\)](#)

Upgrade to the cross-lingual intent model to get improved bot performance and make adding 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. With the cross-lingual intent model, you also get intent and system entity recognition support for 19 languages, including Arabic (beta).

### [Save Agents' Time with New Messaging Components for Enhanced Bots \(Beta\)](#)

Empower customers and save service agents' time with the authentication, custom, form, and payment messaging components. Enhanced bots can now handle more complex use cases on enhanced Apple Messages for Business channels. The form component is also available for Messaging for In-App and Web.

### [Send a Dynamic File with an Enhanced Bot](#)

Easily send your customers personalized files, such as an invoice related to an account, using an enhanced bot. You can now dynamically populate and send a file with an enhanced bot. Previously, you could send only static files stored in the Asset Library.

### [Translate Dialogs Easily to Different Languages \(Beta\)](#)

Connect with more customers by quickly translating your bot's dialogs to different languages. Multi-language bots can now translate a dialog to another language in seconds. Previously, you manually added translations for each secondary language.

### [Improve Customers' Shopping Experience with the Commerce Concierge Bot Template](#)

Use the Commerce Concierge bot template to connect your store to new or existing Einstein bots. Your customers can authenticate in the store, access multiple accounts, reorder, and leverage Einstein generative AI features, such as product discovery and product discovery feedback.

### [Run Flows in Bot User Context \(Release Update\)](#)

With this update enabled, a flow initiated by a bot runs in user context. 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 prevents flows initiated by a bot from creating, reading, updating, or deleting records that the bot doesn't have permission to access or modify. Previously, a flow initiated by a bot ran in system context and had permission to access and modify all data. This update was first made available in Summer '23.

### [View Standard Bot Reports in the Spring '24 Folder](#)

Each release, Einstein Bots adds a folder that contains the latest versions of all standard bot reports. In Spring '24, no changes affect standard bot metric types or individual reports from Winter '24, but you can access fresh versions of all reports in the Einstein Bot Reports Spring '24 folder.

## Teach Your Bot New Languages More Easily with the Cross-Lingual Intent Model (Generally Available)

Upgrade to the cross-lingual intent model to get improved bot performance and make adding 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. With the cross-lingual intent model, you also get intent and system entity recognition support for 19 languages, including Arabic (beta).

**Where:** This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions. Setup for Einstein Bots is available only in Lightning Experience.

**Why:** You can train the cross-lingual intent model 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.

**How:** 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.

Newly created or cloned bots and bot versions default to the cross-lingual intent model, including single- and multi-language bots.

To define languages for your bot, including the 19 languages in beta that you get with the cross-lingual intent model, go to the Bot Overview page.

SEE ALSO:

[Salesforce Help: Turn on the Cross-Lingual Intent Model \(can be outdated or unavailable during release preview\)](#)


[Salesforce Help: Use Intents to Understand Your Customers \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Define Languages for Your Einstein Bot \(can be outdated or unavailable during release preview\)](#)

## Save Agents' Time with New Messaging Components for Enhanced Bots (Beta)

Empower customers and save service agents' time with the authentication, custom, form, and payment messaging components. Enhanced bots can now handle more complex use cases on enhanced Apple Messages for Business channels. The form component is also available for Messaging for In-App and Web.

**Where:** This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions. Setup for Einstein Bots is available only in Lightning Experience.

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

**Why:** The new messaging components support powerful bot interactions with customers.

- Authentication: Verify a customer's identity.
- Custom: Embed an external app in a bot conversation.

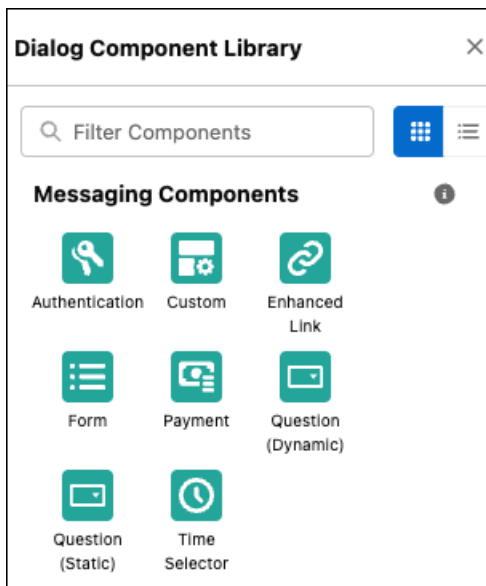
- **Form:** Send a form to easily and securely gather information from a customer.
- **Payment:** Process a payment with Apple Pay.

The authentication, form, and payment components are a new class of asynchronous messaging components. Unlike with other messaging components, when the bot sends an asynchronous component, the customer can respond to the component later.

To ensure a natural conversational experience, you can tell the bot to wait for customer input or move on to the next dialog step depending on the scenario. You can also control how the bot responds to errors by customizing error handling for asynchronous components.

**How:** Create and manage components on the Messaging Components page in Setup.

To add a messaging component to your enhanced bot, on the Dialogs page of the Bot Builder, add the associated dialog step to a dialog.



SEE ALSO:

[Salesforce Help: Asynchronous Messaging Components \(Beta\) \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Share an External App with an Enhanced Bot \(Beta\) \(can be outdated or unavailable during release preview\)](#)

## Send a Dynamic File with an Enhanced Bot

Easily send your customers personalized files, such as an invoice related to an account, using an enhanced bot. You can now dynamically populate and send a file with an enhanced bot. Previously, you could send only static files stored in the Asset Library.

**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 generate a file with dynamic content, create an Apex class or flow that populates a file. Then, in the Bot Builder, add the Apex action to a dialog and select the name of the class that you created. Create an ID variable that stores the action output.

To send the dynamic file, add the File dialog step immediately after the Apex action. Then, in the Step Properties panel, select **Send File** and select **Dynamic (Content Version Variable)** as the content type. Enter and then select the name of the action output variable.



### Step Properties

Select File Interaction

\* File Interaction

Send File ▼

File Content

To send a file with static content, upload an asset file. To send a file with dynamic content, use a variable to populate the file.

\* Content type

Static (Asset File)

Dynamic (Content Version Variable)

Use output variables from previous Apex or Flow action steps to populate variable.

\* Variable Name

Select a variable... ▼

SEE ALSO:

[Salesforce Help: Send a File with Dynamic Content from an Enhanced Bot \(can be outdated or unavailable during release preview\)](#)

## Translate Dialogs Easily to Different Languages (Beta)

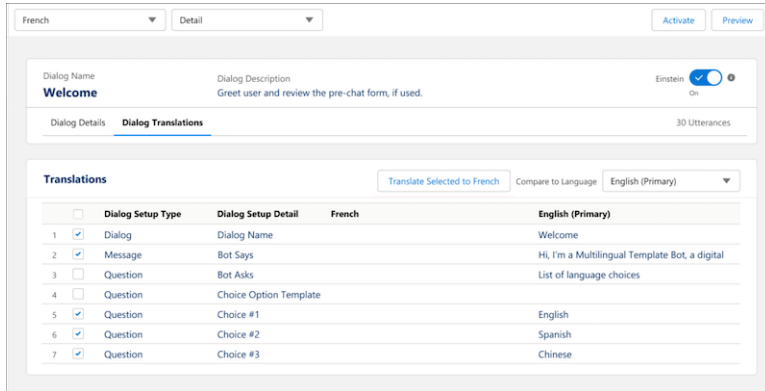
Connect with more customers by quickly translating your bot's dialogs to different languages. Multi-language bots can now translate a dialog to another language in seconds. Previously, you manually added translations for each secondary language.

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



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

**How:** In the Bot Builder, go to the dialog that you want to translate. Then, on the Dialog Translations tab, select a secondary language from the dropdown. In the Translations section, select the dialog steps that you want to translate, and then click **Translate Selected**.



SEE ALSO:

[Salesforce Help: Define Languages for Your Einstein Bot \(can be outdated or unavailable during release preview\)](#)

## Improve Customers' Shopping Experience with the Commerce Concierge Bot Template

Use the Commerce Concierge bot template to connect your store to new or existing Einstein bots. Your customers can authenticate in the store, access multiple accounts, reorder, and leverage Einstein generative AI features, such as product discovery and product discovery feedback.

**Where:** This change applies to Lightning Experience in Unlimited editions with Commerce Cloud Einstein and the Einstein Bots and Digital Engagement add-on. Einstein generative AI is available in Lightning Experience.

**When:** The Commerce Concierge bot template is available after February 4, 2024.

SEE ALSO:

[Optimize Your Customers Shopping Experience with the Commerce Concierge Bot](#)

## Run Flows in Bot User Context (Release Update)

With this update enabled, a flow initiated by a bot runs in user context. 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 prevents flows initiated by a bot from creating, reading, updating, or deleting records that the bot doesn't have permission to access or modify. Previously, a flow initiated by a bot ran in system context and had permission to access and modify all data. This update was first made available 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:** This update improves security by preventing you from unintentionally allowing bots to create or modify records that they don't have access to.

**How:** 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](#)

## View Standard Bot Reports in the Spring '24 Folder

Each release, Einstein Bots adds a folder that contains the latest versions of all standard bot reports. In Spring '24, no changes affect standard bot metric types or individual reports from Winter '24, but you can access fresh versions of all reports in the Einstein Bot Reports Spring '24 folder.

**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: Navigate Einstein Bot Standard Reports \(can be outdated or unavailable during release preview\)](#)

## Einstein Copilot

Bring the power of conversational AI to your business with Einstein Copilot.

### [Meet Your Team's Trusted AI Assistant](#)

Introducing Einstein Copilot, a conversational AI assistant for your Salesforce CRM that helps your employees accomplish key business tasks, such as summarizing records and drafting emails, just by asking. The intuitive chat interface is embedded in your users' flow of work, making it easy for them to get Einstein's help within Salesforce. Behind the scenes, your copilot uses a large language model (LLM) to understand your users' messages, identify and execute relevant actions, and generate natural language responses. Interactions are grounded in your data and secured through the Einstein Trust Layer. The result is a conversational experience that empowers your employees to get work done faster.

### [Launch Your Copilot Quickly with Standard Actions](#)

Using just the default standard actions provided by Salesforce, you can quickly launch a powerful copilot on the desktop site and the Salesforce mobile app without building out any custom functionality. Actions are how a copilot gets things done, and your copilot includes a library of actions that help carry out users' requests.

### [Extend Your Copilot with Custom Actions](#)

With custom actions, you can extend your copilot with additional functionality so it's ready to assist users with tasks specific to your business. When you create a custom action, you build it on top of preexisting platform functionality you want to make available in Einstein Copilot: invocable Apex classes, autolaunched flows, or prompt templates. Adding custom actions lets you customize your copilot and get more mileage out of your current Salesforce platform capabilities.

### [Customize, Test, and Troubleshoot Your Copilot All In One Place](#)

Unlike a traditional chatbot, a copilot can reason and respond dynamically in a conversation. But how can you be sure that your copilot understands your users' requests, launches the right actions, and generates helpful responses? Use the Copilot Builder to manage your copilot's actions and settings, preview a conversation and the reasoning behind it, and audit conversational activity.

### [Gauge Einstein Copilot Adoption and Usability with Analytics](#)

Track the usability of your copilot and get insights on standard and custom actions with the Copilot Analytics dashboard. See how many users are engaged with your copilot, what actions are launched, and how successful those actions are in easy-to-read charts and metrics. This data helps you check the success of your adoption efforts and determine how the actions assigned to your copilot are faring.

### [Welcome Users to Copilot with Recommended Contextual Actions](#)

The first time your users access Einstein Copilot, or at the start of a new session, they now automatically see a welcome screen that shows them recommended actions based on page context. For example, sales reps accessing accounts and opportunities are welcomed to their copilot experience with actions such as “Show top opportunities” or “Show recent opportunities.” The welcome message that you set in System Messages now appears at the top of the new welcome page, instead of as the first message to a user.

### [See a Warning if Copilot Generates Response with Toxic Language](#)

Your users now see a warning if your copilot generates a response that uses harmful or offensive language. Content tagged with the flag also shows up in the Einstein audit trail. After Einstein tags content as having harmful language, users are asked to exercise judgment, and if necessary, generate a new response.

## Meet Your Team’s Trusted AI Assistant

Introducing Einstein Copilot, a conversational AI assistant for your Salesforce CRM that helps your employees accomplish key business tasks, such as summarizing records and drafting emails, just by asking. The intuitive chat interface is embedded in your users’ flow of work, making it easy for them to get Einstein’s help within Salesforce. Behind the scenes, your copilot uses a large language model (LLM) to understand your users’ messages, identify and execute relevant actions, and generate natural language responses. Interactions are grounded in your data and secured through the Einstein Trust Layer. The result is a conversational experience that empowers your employees to get work done faster.

**Where:** This change applies to Lightning Experience, the Salesforce mobile app for iOS and Android, the Field Service mobile app for iOS and Android, and Sales Cloud Everywhere in Enterprise, Performance, and Unlimited editions with the Einstein for Sales, Einstein for Service, or Einstein Platform add-on. Setup for Einstein Copilot is available on the desktop site.

To purchase the Einstein for Sales, Einstein for Service, or Einstein Platform add-on, contact your Salesforce account executive.

**When:** Einstein Copilot is generally available for the desktop site and Sales Cloud Everywhere starting April 10, 2024. Einstein Copilot for the Salesforce mobile app and the Field Service mobile app is generally available starting the week of April 22, 2024.

**Who:** To give users access to Einstein Copilot, assign the Einstein Copilot for Salesforce User permission set group.

**Why:** Einstein Copilot is purpose-built to deliver a flexible, trusted, and customizable conversational experience.

- **Flexible:** Unlike traditional chatbots, which are limited to relatively strict conversational paths, Einstein Copilot is built on actions, which are the things a copilot can do in Salesforce. With the help of an LLM, your copilot can dynamically mix and match actions to address user requests. And your copilot retains context, so it can follow the conversation deeper (for example, with a follow-up question) or wider (for example, with a change in subject).
- **Trusted:** Einstein Copilot is integrated with the Einstein Trust Layer, so your copilot can use data safely with key guardrails like masking for sensitive data. Plus, Einstein Copilot respects controls such as licenses and user permissions, so you can limit the data your users access and the actions they execute.
- **Customizable:** The actions you assign to your copilot define what your copilot can do. Choose from a library of standard copilot actions, which are ready to use right out of the box. Or extend your copilot by creating a custom copilot action. Start with the functionality you already have in Salesforce, such as an invocable Apex class, autolaunched flow, or prompt template. Then tell your copilot how to use the action with words, not code.

**How:** Before you get started with Einstein Copilot, enable Einstein generative AI. Then turn on Einstein Copilot for Salesforce from the Einstein Copilots page in Setup.

After you enable Einstein Copilot, your new copilot is available on the Einstein Copilots page. It comes with all the standard copilot actions available to you already assigned, so you can open your copilot in the Copilot Builder and start testing right away.

To launch your copilot to your users, from the Copilot Builder, activate your copilot. When you activate your copilot, the Einstein panel is docked on the right side of your users' window on the desktop site, above the tab bar in the Salesforce and Field Service mobile apps, and in the Einstein footer in Sales Cloud Everywhere.

SEE ALSO:

[Salesforce Help: Einstein Copilot](#)


[Trailhead: Einstein Copilot Basics \(can be unavailable before on-sale date\)](#)

## Launch Your Copilot Quickly with Standard Actions

Using just the default standard actions provided by Salesforce, you can quickly launch a powerful copilot on the desktop site and the Salesforce mobile app without building out any custom functionality. Actions are how a copilot gets things done, and your copilot includes a library of actions that help carry out users' requests.

**Where:** This change applies to Lightning Experience, the Salesforce mobile app for iOS and Android, the Field Service mobile app for iOS and Android, and Sales Cloud Everywhere in Enterprise, Performance, and Unlimited editions with the Einstein for Sales, Einstein for Service, or Einstein Platform add-on. Setup for Einstein Copilot is available on the desktop site.

To purchase the Einstein for Sales, Einstein for Service, or Einstein Platform add-on, contact your Salesforce account executive.

 **Note:** Some Einstein Copilot actions are in beta and have limited functionality, as further described in the Documentation. Including them in a copilot is part of the Services and will consume Einstein Requests if enabled and used.

**When:** Einstein Copilot is generally available for the desktop site and Sales Cloud Everywhere starting April 10, 2024. Einstein Copilot for the Salesforce mobile app and the Field Service mobile app is generally available starting the week of April 22, 2024.

**Who:** Many standard copilot actions are available to users who have permission to access Einstein Copilot. Other standard actions were built to work with specific clouds or products, so they require specific or additional licenses or permissions. To use standard actions that execute prompt templates, the Execute Prompt Templates permission is required.

**Why:** These standard actions are included with Einstein Copilot, a brief description of what they do, and an example of a user request that can trigger the action.

Action	What It Does
Answer Questions with Knowledge	Answers a question from a user based on information from relevant knowledge articles. Requires a Knowledge license. Example: "What is the policy for returns over 30 days?"
Create Close Plan	Generates a sales plan to help reps close an opportunity by its target date. This action is available with the Einstein for Sales add-on to users with the Close Plan user permission. Example: "Create a close plan for this opportunity."
Draft or Revise Sales Email	Creates a sales email draft or revises the latest generated email based on the user's input. Example: "Help me write an intro email to Steve from Acme."
Explore Conversation	Answers a question about a voice or video call based on the contents of the call transcript. Requires Einstein Conversation Insights and Einstein for Sales. Example: "What was the customer sentiment on this call?"

Action	What It Does
Find Similar Opportunities	Searches for and returns a list of won opportunities that are similar to, but not duplicates of, a specified Salesforce opportunity. An explanation of the similarities is returned with each opportunity record.  Example: "Show me other won deals like this one."
Get Forecast Guidance	Calculates a seller's gap to Commit and gap to Most Likely and flags risky deals in a seller's forecast. Requires the Einstein for Sales add-on.  Example: "Show me Vince West's forecast."
Identify Object by Name	Interprets the user's input to decide which object the user is referring to, then returns the object's name so additional actions can be taken.  Example: If the user enters, "List the opportunities for the Acme account" in the copilot conversational interface, the action identifies that the user is requesting information related to the Account object and Opportunity object.
Identify Record by Name	Searches for Salesforce records by name and returns a list of matching record IDs.  Example: "Show me the Acme deal."
Query Records (Beta)	Finds and retrieves Salesforce records based on the user's request and specific conditions, such as the values of fields.  Example: "Find all open opportunities set to close this quarter."
Query Records with Aggregate (Beta)	Answers aggregation questions about Salesforce data, such as count, sum, or average.  Example: "How many opportunities were created in the last 5 days?"
Summarize Record	Summarizes a Salesforce record. This action can summarize any record, but some records for some users have predefined prompt templates that customize the summary.  Example: "Create a summary for the Acme deal."

**How:** From the Copilots page, click your copilot, and then select the Actions tab on the detail page to review the list of standard actions assigned to the copilot.

Manage your actions from the Copilot Actions setup page or in the Copilot Builder.

SEE ALSO:

[Salesforce Help: Einstein Copilot Standard Action Reference](#)

## Extend Your Copilot with Custom Actions

With custom actions, you can extend your copilot with additional functionality so it's ready to assist users with tasks specific to your business. When you create a custom action, you build it on top of preexisting platform functionality you want to make available in Einstein Copilot: invocable Apex classes, autolaunched flows, or prompt templates. Adding custom actions lets you customize your copilot and get more mileage out of your current Salesforce platform capabilities.

**Where:** This change applies to Lightning Experience, the Salesforce mobile app for iOS and Android, the Field Service mobile app for iOS and Android, and Sales Cloud Everywhere in Enterprise, Performance, and Unlimited editions with the Einstein for Sales, Einstein for Service, or Einstein Platform add-on. Setup for Einstein Copilot is available on the desktop site.

To purchase the Einstein for Sales, Einstein for Service, or Einstein Platform add-on, contact your Salesforce account executive.

**When:** Einstein Copilot is generally available for the desktop site and Sales Cloud Everywhere starting April 10, 2024. Einstein Copilot for the Salesforce mobile app and the Field Service mobile app is generally available starting the week of April 22, 2024.

**Why:** Wondering how your company can use custom actions? The possibilities are endless, so it depends on the unique needs of your business. Here are a few use cases for custom actions.

- Get order details
- Initiate an order return
- Make product recommendations
- Check inventory levels
- Create and modify invoices
- Book sales meetings
- Create marketing materials
- Log internal IT tickets

**How:** From Setup, go to the Einstein Copilot Actions page, and then click **New Copilot Action** to start building a custom action.

SEE ALSO:

[Salesforce Help: Extend Your Copilot with Custom Actions](#)

## Customize, Test, and Troubleshoot Your Copilot All In One Place

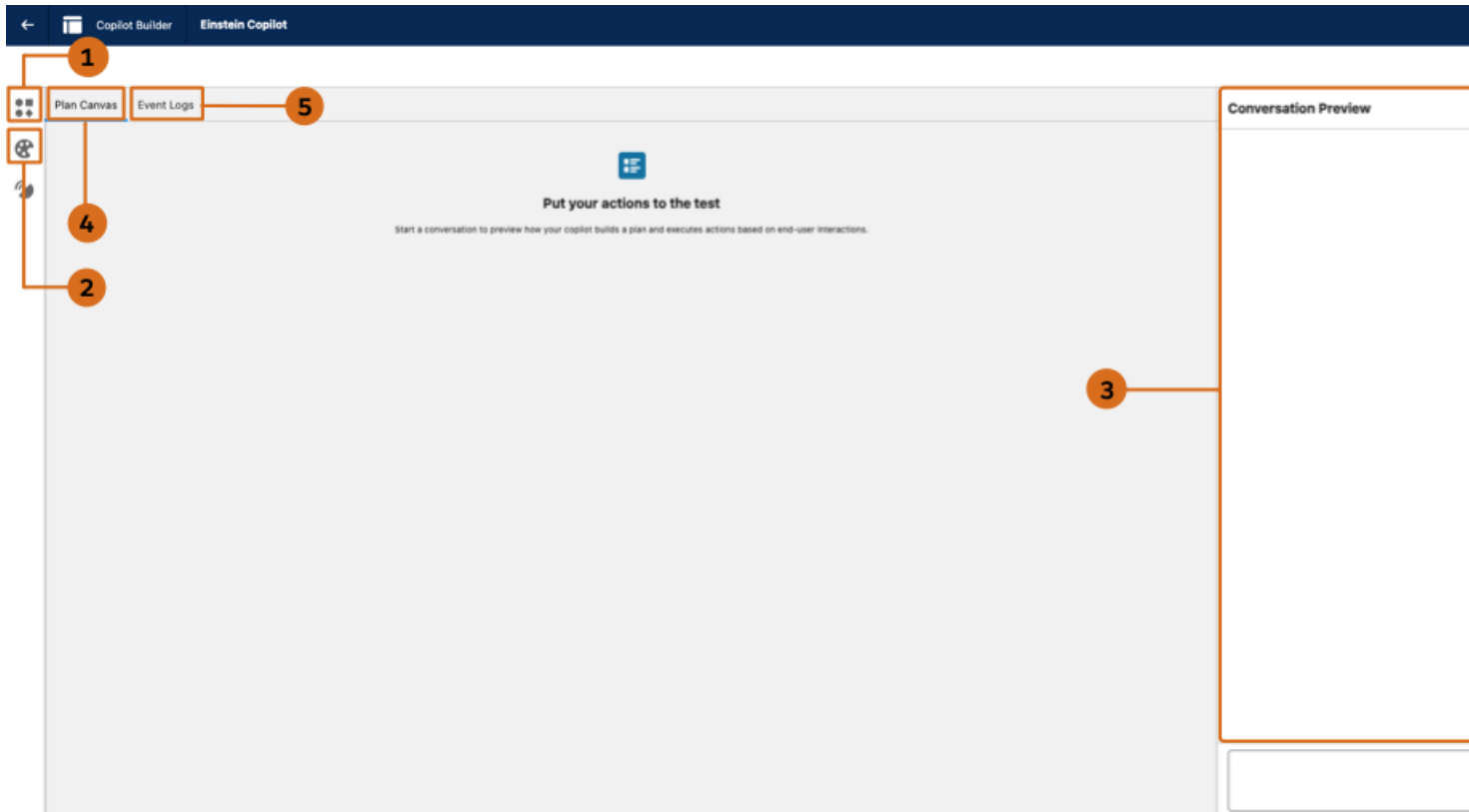
Unlike a traditional chatbot, a copilot can reason and respond dynamically in a conversation. But how can you be sure that your copilot understands your users' requests, launches the right actions, and generates helpful responses? Use the Copilot Builder to manage your copilot's actions and settings, preview a conversation and the reasoning behind it, and audit conversational activity.

**Where:** This change applies to Lightning Experience, the Salesforce mobile app for iOS and Android, the Field Service mobile app for iOS and Android, and Sales Cloud Everywhere in Enterprise, Performance, and Unlimited editions with the Einstein for Sales, Einstein for Service, or Einstein Platform add-on. Setup for Einstein Copilot is available on the desktop site.

To purchase the Einstein for Sales, Einstein for Service, or Einstein Platform add-on, contact your Salesforce account executive.

**When:** Einstein Copilot is generally available for the desktop site and Sales Cloud Everywhere starting April 10, 2024. Einstein Copilot for the Salesforce mobile app and the Field Service mobile app is generally available starting the week of April 22, 2024.

**Why:** The Copilot Builder comes with all the tools to help you launch your copilot with confidence.



In the Copilot Builder, you can:

- Add or remove actions from your copilot (1). The Copilot Action Library shows you all the standard and custom actions that are available to assign, so you can teach your copilot new tricks with just a few clicks.
- Adjust your copilot's language settings to make responses sound more like your company (2).
- Take your copilot for a test drive. Describe a task or ask a question to start a conversation with your copilot (3). With each message you send, the plan canvas shows you how your copilot builds a plan and executes actions (4). Use this info to evaluate how your copilot performs and, if necessary, iterate on your action instructions.
- Monitor the event logs for a test or live session to dig into errors and other conversational activity (5).

**How:** From the Copilots page, click your copilot, and then open it in the Copilot Builder.

## Gauge Einstein Copilot Adoption and Usability with Analytics

Track the usability of your copilot and get insights on standard and custom actions with the Copilot Analytics dashboard. See how many users are engaged with your copilot, what actions are launched, and how successful those actions are in easy-to-read charts and metrics. This data helps you check the success of your adoption efforts and determine how the actions assigned to your copilot are faring.

**Where:** This change applies to Lightning Experience, the Salesforce mobile app for iOS and Android, the Field Service mobile app for iOS and Android, and Sales Cloud Everywhere in Enterprise, Performance, and Unlimited editions with the Einstein for Sales, Einstein for Service, or Einstein Platform add-on. Setup for Einstein Copilot is available on the desktop site.

To purchase the Einstein for Sales, Einstein for Service, or Einstein Platform add-on, contact your Salesforce account executive.

**When:** Einstein Copilot is generally available for the desktop site and Sales Cloud Everywhere starting April 10, 2024. Einstein Copilot for the Salesforce mobile app and the Field Service mobile app is generally available starting the week of April 22, 2024.



**How:** To see the dashboards, from Setup, in the Quick Find box, enter *Einstein Copilot Analytics*, and then select **Einstein Copilot Analytics**.

## Welcome Users to Copilot with Recommended Contextual Actions

The first time your users access Einstein Copilot, or at the start of a new session, they now automatically see a welcome screen that shows them recommended actions based on page context. For example, sales reps accessing accounts and opportunities are welcomed to their copilot experience with actions such as “Show top opportunities” or “Show recent opportunities.” The welcome message that you set in System Messages now appears at the top of the new welcome page, instead of as the first message to a user.

**Where:** This change applies to Lightning Experience, the Salesforce mobile app for iOS and Android, the Field Service mobile app for iOS and Android, and Sales Cloud Everywhere in Enterprise, Performance, and Unlimited editions with the Einstein for Sales, Einstein for Service, or Einstein Platform add-on. Setup for Einstein Copilot is available on the desktop site.

**When:** Einstein Copilot is generally available for the desktop site and Sales Cloud Everywhere starting April 10, 2024. Einstein Copilot for the Salesforce mobile app and the Field Service mobile app is generally available starting the week of April 22, 2024.

**How:** Customize the welcome message in **Setup > Copilot [name] > System Messages**. There’s an 800-character limit on welcome messages. Salesforce automatically recommends actions based on the context of the current page.

## See a Warning if Copilot Generates Response with Toxic Language

Your users now see a warning if your copilot generates a response that uses harmful or offensive language. Content tagged with the flag also shows up in the Einstein audit trail. After Einstein tags content as having harmful language, users are asked to exercise judgment, and if necessary, generate a new response.

**Where:** This change applies to Lightning Experience, the Salesforce mobile app for iOS and Android, the Field Service mobile app for iOS and Android, and Sales Cloud Everywhere in Enterprise, Performance, and Unlimited editions with the Einstein for Sales, Einstein for Service, or Einstein Platform add-on. Setup for Einstein Copilot is available on the desktop site.

SEE ALSO:

[Salesforce Help: Audit Trail](#)

## Einstein Studio in Data Cloud

With Einstein Studio in Data Cloud, you can create your own predictive AI models, bring in predictions from models in Databricks, and connect to generative AI large language models (LLMs) from OpenAI and Azure Open AI. Use your AI models in batch transforms, flow actions, and Prompt Builder. Learn more about Einstein Studio in the Data Cloud release notes.

**Where:** This change applies to Data Cloud in Enterprise, Performance, Unlimited, and Developer editions. Einstein generative AI is available in Lightning Experience.

SEE ALSO:

[AI in Data Cloud](#)

## Einstein Trust Layer

The Einstein Trust Layer elevates the security of generative AI at Salesforce through data and privacy controls that are integrated into the end-user experience.

### [Protect Sensitive Data with Data Masking](#)

Get the benefit of generative AI without compromising your data security and privacy. Salesforce detects and masks your personally identifiable information (PII) and payment card industry (PCI) data that's specific to your region. In addition to the Salesforce zero-data retention policy, this approach helps make sure your sensitive data isn't exposed to LLMs.

### [Select What Data to Mask](#)

Personalize Einstein Trust Layer settings to align with your company's policies. Einstein Trust Layer detects and masks sensitive data by default, but now you can select what data you want to mask and prevent exposure to external large language models (LLMs).

### [Track Einstein Trust Layer Functionality with Audit Trail](#)

You can now track the usage of generative AI in your Salesforce org. The audit trail along with feedback data is stored in Data Cloud. Use this data to see how the Einstein Trust Layer protects your company's sensitive data from exposure to an external LLM. You can also use it to verify the safety of the generated response.

## Protect Sensitive Data with Data Masking

Get the benefit of generative AI without compromising your data security and privacy. Salesforce detects and masks your personally identifiable information (PII) and payment card industry (PCI) data that's specific to your region. In addition to the Salesforce zero-data retention policy, this approach helps make sure your sensitive data isn't exposed to LLMs.

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

SEE ALSO:

[Salesforce Help: Data Masking](#)

[Salesforce Help: Einstein Trust Layer Region Language Support](#)

## Select What Data to Mask

Personalize Einstein Trust Layer settings to align with your company's policies. Einstein Trust Layer detects and masks sensitive data by default, but now you can select what data you want to mask and prevent exposure to external large language models (LLMs).

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

**How:** Ensure Einstein AI is enabled. Select Einstein Trust Layer and make sure data masking is enabled. Select **Configure Data Masking** from Einstein Trust Layer.

SEE ALSO:

[Salesforce Help: Select What Data to Mask](#)

## Track Einstein Trust Layer Functionality with Audit Trail

You can now track the usage of generative AI in your Salesforce org. The audit trail along with feedback data is stored in Data Cloud. Use this data to see how the Einstein Trust Layer protects your company's sensitive data from exposure to an external LLM. You can also use it to verify the safety of the generated response.

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

**How:** Turn on Einstein generative AI and feedback data collection and storage from Einstein Setup. You must first turn on Einstein and ensure Data Cloud is fully provisioned in your Salesforce org. By turning on Einstein generative AI and feedback data collection and storage, you consent to storing your data in Data Cloud.

SEE ALSO:

[Salesforce Help: Audit Trail](#)

## Prompt Builder

Prompt Builder is generally available.

### [Simplify Daily Tasks with Prompt Builder \(Generally Available\)](#)

Streamline your users' tasks by integrating generative-AI moments powered by prompt templates into their workflow. Prompt Builder enables you to create customizable prompt templates using trusted generative AI technology while keeping your data secure. With Prompt Builder, you can dynamically ground prompt templates with CRM data, which provides a large language model (LLM) with the context to create personalized responses. A customized Sales Email prompt template helps your sales team to quickly generate a personalized email for a contact or a lead. A Field Generation prompt template can quickly populate a field with useful information, such as a summary of open cases for an account, to facilitate more productive conversations with your customers. For other use cases, a Flex prompt template offers a wide array of possibilities, such as generating a newsletter based on product and campaign objects.

### Simplify Daily Tasks with Prompt Builder (Generally Available)

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**Where:** Prompt Builder is available in Lightning Experience in Enterprise, Performance, and Unlimited editions. Einstein generative AI is available in Lightning Experience.

Prompt Builder is included in Unlimited+. To use Prompt Builder in Enterprise, Performance, and Unlimited editions requires the Einstein for Sales, Einstein for Platform, or Einstein for Service add-on. These add-ons include Data Cloud. To purchase an add-on, contact your Salesforce account executive.

**When:** Prompt Builder is generally available on February 29, 2024.

**Who:** To work with prompt templates:

- An admin needs the Prompt Template Manager permission set and the Einstein Prompt Templates permission set license to create and manage prompt templates in Prompt Builder.
- An admin or data scientist needs the Data Cloud Admin permission set to view a model or bring your own model in Einstein Studio.
- An end user needs the Prompt Template User permission set and the Einstein Prompt Templates permission set license to use prompt templates.

To use Sales Emails, users need the Einstein Sales Emails permission set.

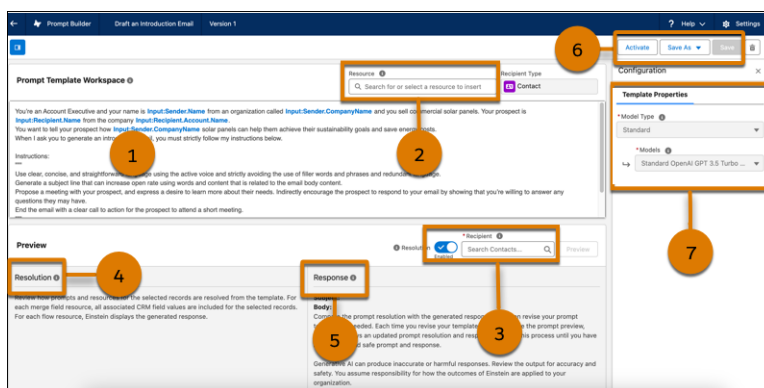
**How:** From Setup, [enable Einstein](#) to use generative AI features.

To use Prompt Builder, from Setup, in the Quick Find box, enter *Prompt*, and then select **Prompt Builder**.

Create, test, revise, and manage prompt templates in Prompt Builder. Ground your prompt templates with your CRM data by adding merge fields that reference record fields, flows with the Prompt Flow type, related lists, and Apex as data resources in your prompt templates.

To use Sales Email prompt templates, from Setup, in the Quick Find box, enter *Einstein Sales*, select **Einstein for Sales**, and then enable **Sales Emails**. It can take a few minutes before the feature is ready to use.

The Prompt Template Workspace is where you create or edit a prompt template. This example shows a Sales Email prompt template that drafts an introduction email to a contact.



Provide instructions to the LLM to generate content for your use case (1).

Add merge fields, which reference resources, such as record fields, flows, related lists, and Apex (2).

To preview a sales email response, select a Recipient (3). To generate the resolved prompt and the response, click **Preview**.

Review how the resources are resolved with actual data for the selected recipient (4).

Review the email generated by the LLM response (5).

Review, refine, and save the prompt template. When the template is tested and ready, activate it to make it available to your sales team (6).

Optionally, select the model to use, or view the model in Einstein Studio if you have the Data Cloud Admin permission set (7).

For information on using a Sales Email prompt template for a contact or a lead, see [Draft Personalized Sales Emails with Einstein](#)

For information on using a Field Generation prompt template to populate a field value, see [Field Generation Prompt Templates in Action](#) in Salesforce Help.

#### SEE ALSO:

[Salesforce Help: Prompt Builder](#)

[Salesforce Help: Enable Einstein Generative AI](#)

[Salesforce Video: Get To Know Prompt Builder](#)

[Salesforce Video: How to Build a Prompt Template](#)

## Other Changes

Enjoy expanded Einstein generative AI support for languages.

### [Use Multilingual Support in Einstein Generative AI](#)

Support global audiences with Einstein generative AI. Now Einstein generative AI supports more than English on the Einstein generative AI platform and features such as Service Replies for Chat and Work Summaries. Users can work with Einstein generative AI in French, German, Italian, Japanese, and Spanish.

### [Editions Support for Einstein Generative AI](#)

Now Einstein generative AI supports Enterprise, Performance, and Unlimited Editions in Lightning Experience.

### [Improve Your Einstein Usage with Generative AI Audit and Feedback Data](#)

You can now audit and enhance your generative AI applications using data collected from Einstein and stored in Data Cloud.

## Use Multilingual Support in Einstein Generative AI

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

SEE ALSO:

[Salesforce Help: Language and Locale Considerations for Einstein Generative AI \(can be outdated or unavailable during release preview\)](#)

## Editions Support for Einstein Generative AI

Now Einstein generative AI supports Enterprise, Performance, and Unlimited Editions in Lightning Experience.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions with the Einstein for Sales, Einstein for Service, or Einstein Platform add-ons.

## Improve Your Einstein Usage with Generative AI Audit and Feedback Data

You can now audit and enhance your generative AI applications using data collected from Einstein and stored in Data Cloud.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions. Einstein generative AI is available in Lightning Experience.

**Why:** Use Einstein generative AI and feedback data to perform analytics, prompt adjustments, and LLM training. Generative AI data collected includes, but is not limited to, prompts and generated responses, PII-masked and unmasked response text, and response toxicity scores. This same data is used by the Einstein Trust Layer Audit Trail. Feedback data collected includes thumbs up and thumbs down responses and reason text.

**How:** Turn on Einstein generative AI and feedback data collection and storage from Einstein Setup. You must first turn on Einstein and ensure Data Cloud is fully provisioned in your org. By turning on Einstein generative AI and feedback data collection and storage, you consent to store your data in your Data Cloud instance.

**When:** This functionality is available starting in March 2024.

SEE ALSO:

[Salesforce Help:Generative AI Audit and Feedback Data \(can be outdated or unavailable during release preview\)](#)

# Experience Cloud

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Discover a number of upgrades to improve your LWR and Aura sites. See all your site publication changes in Experience Builder with the Change History panel. Use improved URL configuration options to make your URLs SEO friendly and drive more traffic to your LWR sites. Improve site performance, scalability, security, and SEO with Experience Delivery (pilot), a new LWR site infrastructure. And build more personalized sites with Expression-Based Component Variations, now generally available.

## [Aura and LWR Sites](#)

Whether your sites are Aura or LWR, there's something new for you. For all sites, use the Change History panel to see your site publication changes in one place and enjoy improvements to the user interface. For LWR sites, boost site traffic with custom URLs that improve SEO and offer your sites in 40 languages.

## [Components in Experience Builder](#)

Expression-Based Component Variations is generally available in enhanced LWR sites. On Aura sites, the new Tab Layout component offers smoother performance. Precisely determine the space between components and the maximum section width for individual sections on your LWR site.

## [Developer Productivity](#)

Use dynamic URL redirects on your LWR site to take visitors to sites hosted on domains outside Salesforce. Test upgraded records components for Aura sites in a sandbox to see how their improved functionality differs from the current components.

## [Site Performance](#)

Try the pilot for Experience Delivery, a powerful new infrastructure for hosting LWR sites, and see the improved performance, scalability, and security that it offers. Update references to your old \*.force.com site URLs in knowledge articles and external resources to ensure continued access to your sites when the redirection of legacy Salesforce domains ends in 2024.

## [Mobile Publisher for Experience Cloud](#)

Prompt users to authenticate with biometric credentials to access features in your Mobile Publisher for Experience Cloud app. Mobile Publisher now requires the Admin SDK private key and config file from your app's Google Firebase project.

## [Security and Sharing](#)

Prepare for updates to format requirements for trusted URLs that define your site's content security policy, which are designed to help prevent code injection attacks. Learn about security and usability updates and a new authorization flow for Salesforce Customer Identity. The Salesforce-managed app for the Twitter authentication provider is no longer supported.

## [Other Changes](#)

Learn about changes to Chatter group member counts.

## Aura and LWR Sites

Whether your sites are Aura or LWR, there's something new for you. For all sites, use the Change History panel to see your site publication changes in one place and enjoy improvements to the user interface. For LWR sites, boost site traffic with custom URLs that improve SEO and offer your sites in 40 languages.

### [IdeaExchange Delivered: Track Site Updates in the New Change History Panel in Experience Builder](#)

Gain insight into your site's changes over time and which user is responsible for each update. The Change History panel shows a chronological list of publication dates for your Aura or LWR site. It also records any changes made to the configuration of domains that are associated with your site. We delivered this feature thanks to your ideas on IdeaExchange.

### [Translate Your LWR Site into Even More Languages](#)

Expand your reach to even more audiences across the globe. Now you can offer your LWR site in up to 40 languages. Previously, you could offer your site in 25 languages.

### [Improve SEO with Custom URLs for Custom Objects \(Beta\)](#)

Boost organic traffic to your site by improving search engine optimization (SEO) with new URL configuration solutions. Create SEO-friendly URL snippets, or “slugs,” for your enhanced LWR site’s custom object pages. A slug improves SEO by replacing the record ID in the URL with relevant and human-readable information, ensuring that your site’s pages are optimally surfaced in search engines. Previously, SEO-friendly URLs were only available for Product and Catalog pages. To use slugs, enable **Use SEO-friendly URLs on this site** in an LWR site’s Preferences in the Administration workspace.

### [Integrate with Data Cloud to Harness Site Data \(Beta\)](#)

To get a complete understanding of who’s visiting your site and how you can best engage with them, integrate your enhanced LWR sites with Data Cloud. After connecting to Data Cloud, your integration gathers user data from your site, such as the user’s profile, site engagement, and diagnostics. That information is then funneled to Data Cloud to build user profiles, create analytics, and personalize your sites. When you turn on your Data Cloud integration, it automatically connects your site to Data Cloud so you can start tracking events as they occur on your site.

### [Configure Search Results Layouts with Search Manager \(Beta\)](#)

Search Manager makes search results from LWR sites more relevant and simplifies the process of creating search configurations. You can add filters to surface only the search results you need. You can save search configurations and apply them to additional sites.

### [Experience an Improved Sitemap Generation and Refresh Schedule](#)

To improve performance and scalability, the schedule for automatic sitemap generation is updated. Full sitemap generation and partial sitemap refresh now start between 12:00 AM and 3:00 AM GMT. Previously, all sitemap processes started at 2:00 AM GMT. The sitemap file now includes an additional partition called `sitemap-<object>-weekly.xml`, which contains new and updated pages from that week. The daily partial sitemap refresh also uses this new partition.

### [Give Your LWR Site Visitors a Better Experience on Tablets with Updated Spacing Defaults](#)

In Experience Builder, you can set different site-level spacing values to control how your site appears on desktop and mobile devices. Updated site spacing defaults for tablets make your site look great in portrait or landscape orientation.

### [Work More Intuitively in Experience Builder with Updates to the User Interface](#)

Small but mighty changes improve Aura and LWR site builders’ experience in Experience Builder. The Preview and Publish buttons have swapped positions, so now they appear in a more logical order. The icon for the Page Structure panel is updated to offer an accurate visual representation of the panel’s contents. And in LWR sites, a delete icon now appears on component labels, making them easier to remove from your site.

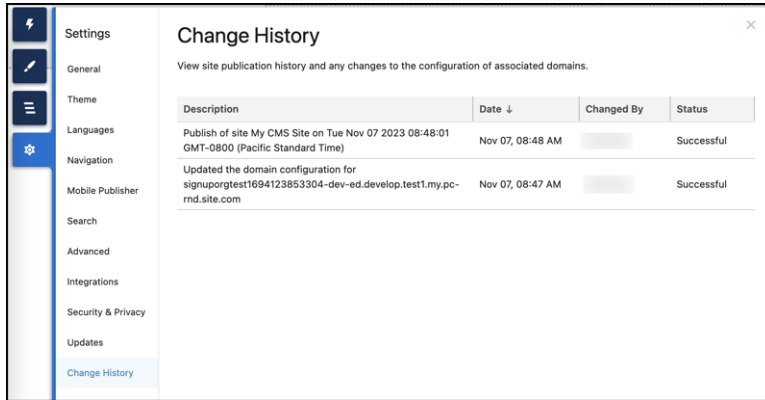


## Track Site Updates in the New Change History Panel in Experience Builder

Gain insight into your site’s changes over time and which user is responsible for each update. The Change History panel shows a chronological list of publication dates for your Aura or LWR site. It also records any changes made to the configuration of domains that are associated with your site. We delivered this feature thanks to your ideas on IdeaExchange.

**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 view the panel in Experience Builder, go to **Settings > Change History**.



## Translate Your LWR Site into Even More Languages

Expand your reach to even more audiences across the globe. Now you can offer your LWR site in up to 40 languages. Previously, you could offer your site in 25 languages.

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

SEE ALSO:

[LWR Sites for Experience Cloud: Create a Multilingual LWR Site \(can be outdated or unavailable during release preview\)](#)

## Improve SEO with Custom URLs for Custom Objects (Beta)


Boost organic traffic to your site by improving search engine optimization (SEO) with new URL configuration solutions. Create SEO-friendly URL snippets, or “slugs,” for your enhanced LWR site’s custom object pages. A slug improves SEO by replacing the record ID in the URL with relevant and human-readable information, ensuring that your site’s pages are optimally surfaced in search engines. Previously, SEO-friendly URLs were only available for Product and Catalog pages. To use slugs, enable **Use SEO-friendly URLs on this site** in an LWR site’s Preferences in the Administration workspace.

**Where:** This change applies to [LWR sites](#) accessed through Lightning Experience and Salesforce Classic in 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](#).

## Integrate with Data Cloud to Harness Site Data (Beta)

To get a complete understanding of who’s visiting your site and how you can best engage with them, integrate your enhanced LWR sites with Data Cloud. After connecting to Data Cloud, your integration gathers user data from your site, such as the user’s profile, site engagement, and diagnostics. That information is then funneled to Data Cloud to build user profiles, create analytics, and personalize your sites. When you turn on your Data Cloud integration, it automatically connects your site to Data Cloud so you can start tracking events as they occur on your site.

**Where:** This change applies to enhanced [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](#).

**Who:** The Data Cloud integration is available for sites with a Data Cloud license.



**Why:** Data is the new currency of business and an important tool for understanding how to best serve your customers. Connect Data Cloud to your Experience sites to collect a comprehensive view of your customers and then use those insights to create enhanced analytics and personalized, one to one experiences for every site visitor.

**How:** To turn on your Data Cloud integration, in Experience Builder, go to Settings and select **Integrations**. On the Data Cloud card, select **Add to Site** and then **Share site data with Data Cloud**. To start sending user engagement data, publish your site.

SEE ALSO:

[Salesforce Help: Connect Experience Cloud to Data Cloud \(Beta\) \(can be outdated or unavailable during release preview\)](#)

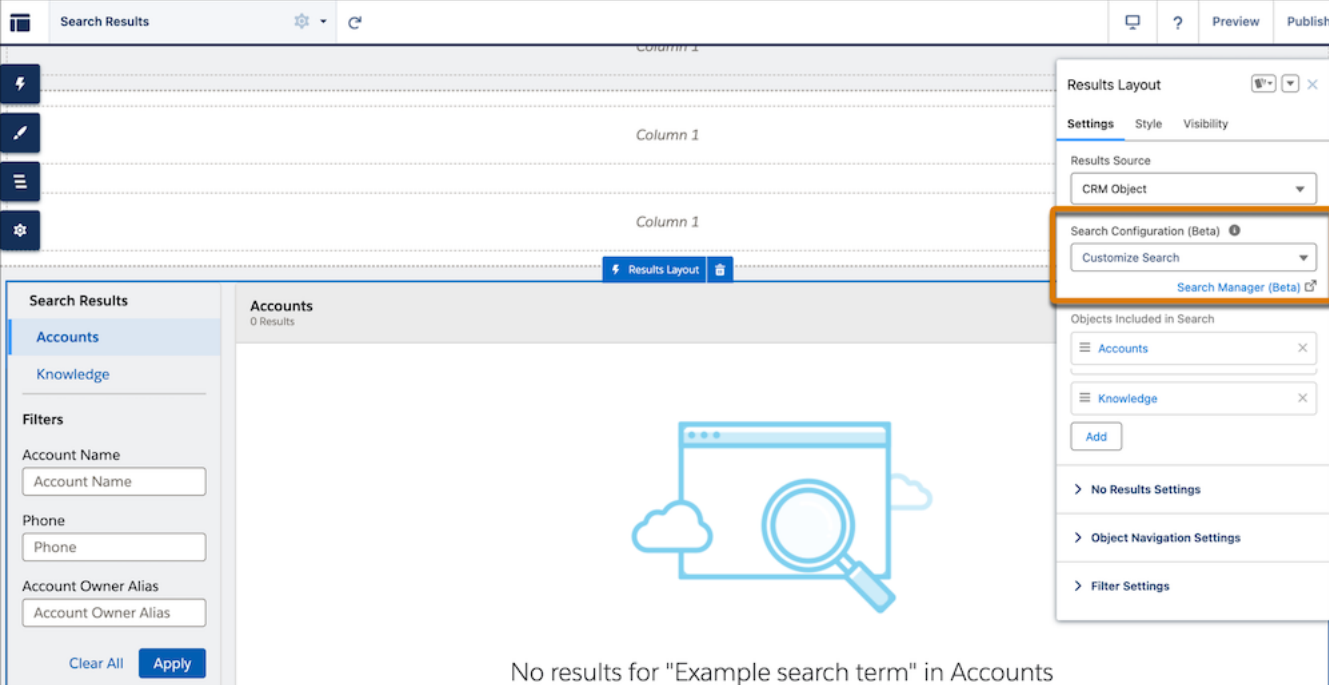
## Configure Search Results Layouts with Search Manager (Beta)

Search Manager makes search results from LWR sites more relevant and simplifies the process of creating search configurations. You can add filters to surface only the search results you need. You can save search configurations and apply them to additional sites.

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

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

**How:** To update the Search Results page for the site you're on, select **Customize Search** from the Select Configuration (Beta) dropdown in the Results Layout component properties panel. To search at a more granular level, click **Search Manager (Beta)** and create a new search configuration. You can select which objects to display as well as filter out fields that you don't need. Search configurations can be saved and applied to more than one site.



The screenshot shows the Salesforce Experience Builder interface for configuring a Search Results component. The main area displays a search results page for 'Accounts' with 0 results. The left sidebar shows filters for Account Name, Phone, and Account Owner Alias. The right sidebar shows the 'Results Layout' configuration panel, where the 'Search Configuration (Beta)' dropdown is set to 'Customize Search' and 'Search Manager (Beta)' is highlighted. The main content area shows a magnifying glass icon and the text 'No results for "Example search term" in Accounts'.

SEE ALSO:

[Salesforce Help: Set Up CRM Object Search in LWR Sites \(can be outdated or unavailable during release preview\)](#)

## Experience an Improved Sitemap Generation and Refresh Schedule

To improve performance and scalability, the schedule for automatic sitemap generation is updated. Full sitemap generation and partial sitemap refresh now start between 12:00 AM and 3:00 AM GMT. Previously, all sitemap processes started at 2:00 AM GMT. The sitemap file now includes an additional partition called `sitemap-<object>-weekly.xml`, which contains new and updated pages from that week. The daily partial sitemap refresh also uses this new partition.

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

**How:** These updates are applied automatically and don't change the way that you interact with the sitemap process. If you're concerned that your sitemap isn't updated frequently enough, you can still manually generate a new sitemap once every 24 hours. For best performance, generate manual sitemaps during off-peak hours.

As we implement these changes, updates to your pages can appear in search results more quickly than they have previously. However, in some cases updates can take longer to appear. To troubleshoot update delays, contact Salesforce Customer Support.

SEE ALSO:

[Salesforce Help: SEO for Experience Builder Sites \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Generate a Manual Sitemap Refresh for Your Experience Builder Site \(can be outdated or unavailable during release preview\)](#)

## Give Your LWR Site Visitors a Better Experience on Tablets with Updated Spacing Defaults

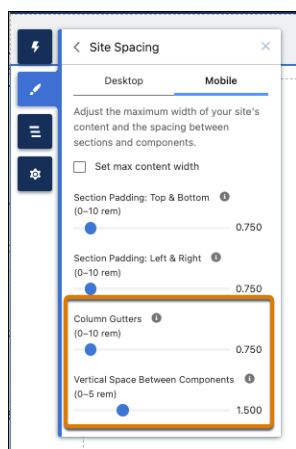
In Experience Builder, you can set different site-level spacing values to control how your site appears on desktop and mobile devices. Updated site spacing defaults for tablets make your site look great in portrait or landscape orientation.

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

**How:** In **Theme > Site Spacing**, adjust the values for Column Gutters and Vertical Space Between Components on the Desktop and Mobile tabs.

- For tablets held in portrait view, these spacing values now default to the site settings that you enter on the Mobile tab. Previously they defaulted to the site settings that you enter on the Desktop tab.
- For tablets held in landscape view, these spacing values continue to default to the site settings that you enter on the Desktop tab.

To make sure that your LWR site looks just as you want it to in both portrait and landscape views, check it on a tablet.



## Work More Intuitively in Experience Builder with Updates to the User Interface

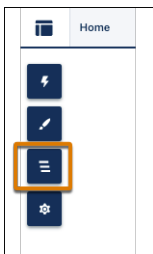
Small but mighty changes improve Aura and LWR site builders' experience in Experience Builder. The Preview and Publish buttons have swapped positions, so now they appear in a more logical order. The icon for the Page Structure panel is updated to offer an accurate visual representation of the panel's contents. And in LWR sites, a delete icon now appears on component labels, making them easier to remove from your site.

**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 Experience Builder, click **Publish** on the outer edge of the navigation bar, or **Preview** to the left of Publish.



The Page Structure icon is above the Settings icon. Click it to open the Page Structure panel.



For LWR sites, the trash can icon appears in the label of any selected component except for Section. To delete the component, click the icon.



## Components in Experience Builder

Expression-Based Component Variations is generally available in enhanced LWR sites. On Aura sites, the new Tab Layout component offers smoother performance. Precisely determine the space between components and the maximum section width for individual sections on your LWR site.

### [Create Component Variations in Enhanced LWR Sites \(Generally Available\)](#)

Expression-Based Component Variations is now generally available in enhanced LWR sites. Create several versions of the same component and then use visibility rules to determine who sees which variation. Component variations inherit properties from the default component and remain in a draft state until you add visibility rules. After you add a visibility rule, the variation leaves the draft state, and you can prioritize the variations to determine which takes precedence when multiple conditions apply at the same time.

### [Use the New Tab Layout Component for Smoother Performance on Your Aura Site](#)

For the most up-to-date user experience on your Aura site, arrange your tabbed content items on the new Tab Layout component. The existing Tabs component still works, but when you replace it with Tab Layout, you and your site visitors can enjoy the new component's better performance.

### [Refine Your LWR Site Layout with Improved Spacing Controls in Experience Builder](#)

Give your site visual punch with precisely determined spacing values in specific sections. Vary the space between components or columns. Customize a section's maximum content width. Previously, you could set these spacing values for an entire site, and adjusting them for a specific section required custom components or CSS overrides. Now you can easily control section spacing right from the Section property panel in Experience Builder.

### [Supercharge Productivity for Sales Partners from Experience Cloud Sites](#)

Now partners can work contacts, leads, and their opportunity pipeline more efficiently from supported Experience Cloud sites using the Enhanced List View component. Enhanced List View is available in the Build Your Own (Aura), Financial Service Client Portal, Insurance Agent Portal, Partner Central, and Manufacturing Experience Cloud templates.

## Create Component Variations in Enhanced LWR Sites (Generally Available)

Expression-Based Component Variations is now generally available in enhanced LWR sites. Create several versions of the same component and then use visibility rules to determine who sees which variation. Component variations inherit properties from the default component and remain in a draft state until you add visibility rules. After you add a visibility rule, the variation leaves the draft state, and you can prioritize the variations to determine which takes precedence when multiple conditions apply at the same time.

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

**How:** To create variations, go to your component. At the top of the properties panel, select the Component Variations dropdown. Select **New Component Variation**. To publish your draft add a visibility rule. When a component has multiple variations, you can put them into priority order, with the top being the highest priority. When no variation visibility rules apply, your site visitors see the default component. To make each variation unique, modify its settings and style.

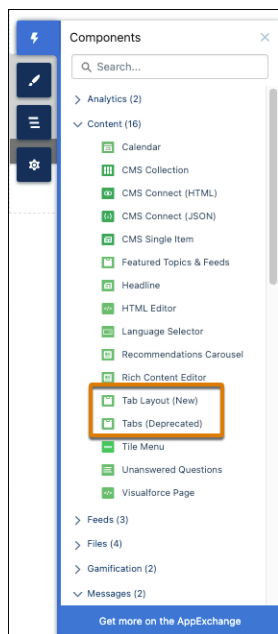
## Use the New Tab Layout Component for Smoother Performance on Your Aura Site

For the most up-to-date user experience on your Aura site, arrange your tabbed content items on the new Tab Layout component. The existing Tabs component still works, but when you replace it with Tab Layout, you and your site visitors can enjoy the new component's better performance.

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

**How:** For existing Aura sites that include the Tabs component, drag the Tab Layout component to the canvas in Experience Builder, and move the components from Tabs to the new component. If you applied custom CSS to the Tabs component, it doesn't automatically apply to the new Tab Layout component. Adjust the custom CSS so that it points to the correct new CSS selector.

To present tab labels in the new component in another language on a multilingual site, export your site content, translate the tab labels, and import the translation back to your site.



## SEE ALSO:

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

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

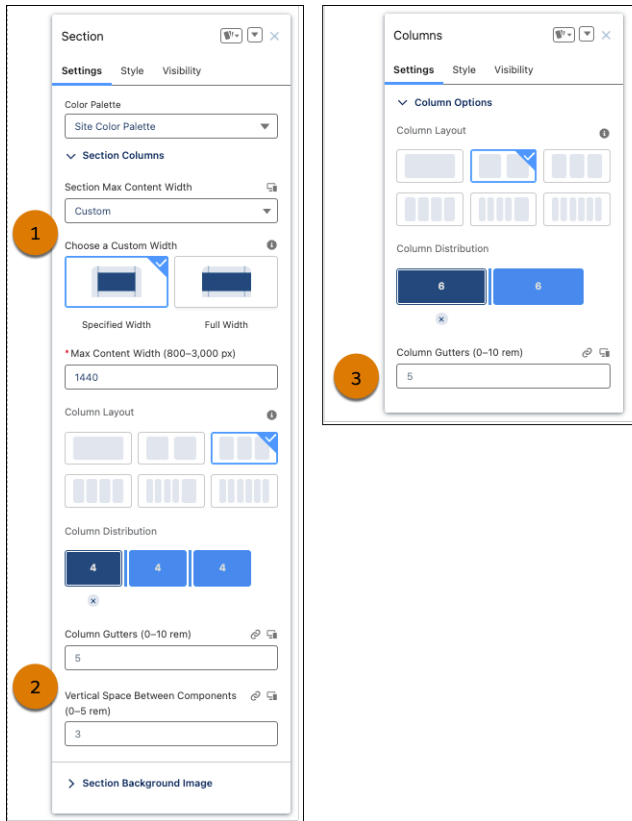
## Refine Your LWR Site Layout with Improved Spacing Controls in Experience Builder

Give your site visual punch with precisely determined spacing values in specific sections. Vary the space between components or columns. Customize a section's maximum content width. Previously, you could set these spacing values for an entire site, and adjusting them for a specific section required custom components or CSS overrides. Now you can easily control section spacing right from the Section property panel in Experience Builder.

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

**How:** On the Settings tab in the Section property panel, open the Section Columns accordion header. Select **Custom** under Section Max Content Width, and use the new spacing controls to specify the section's maximum content width (1). Determine the space between columns and above and below components in the section with the Column Gutters and Vertical Space Between Components fields (2).

You can also customize the space between columns for an individual Columns component (3).



## Supercharge Productivity for Sales Partners from Experience Cloud Sites

Now partners can work contacts, leads, and their opportunity pipeline more efficiently from supported Experience Cloud sites using the Enhanced List View component. Enhanced List View is available in the Build Your Own (Aura), Financial Service Client Portal, Insurance Agent Portal, Partner Central, and Manufacturing Experience Cloud templates.

**Where:** This change applies to [Aura sites](#) accessed through Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions. You must have at least [one active community license](#) that supports PRM.

SEE ALSO:

[Sharpen Selling Decisions with a Consolidated View of Insights on Contacts or Leads](#)

[Prioritize Selling with More Pipeline Insights and Actions](#)

## Developer Productivity

Use dynamic URL redirects on your LWR site to take visitors to sites hosted on domains outside Salesforce. Test upgraded records components for Aura sites in a sandbox to see how their improved functionality differs from the current components.

[Dynamically Redirect Users to Sites Hosted on External Domains](#)

When you use dynamic URL redirects in LWR sites, you can send your users to sites hosted on domains outside Salesforce. Also, dynamic redirect rules can use query parameters on both source and the target.

### [Try a Modernized Record Experience in Aura Sites in Your Sandbox Environment](#)

We upgraded some records components under the hood in your Aura sites. For now, the changes in the Create Record Form, Record Banner, and Record Detail components are available only in your sandbox environment. Test the components, and see how they differ from your current Aura components. Your experience can help us fix any bugs that bubble up.

## Dynamically Redirect Users to Sites Hosted on External Domains

When you use dynamic URL redirects in LWR sites, you can send your users to sites hosted on domains outside Salesforce. Also, dynamic redirect rules can use query parameters on both source and the target.

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

SEE ALSO:

[Salesforce Help: Key Concepts in Page Redirection in Aura and LWR Sites \(can be outdated or unavailable during release preview\)](#)

## Try a Modernized Record Experience in Aura Sites in Your Sandbox Environment

We upgraded some records components under the hood in your Aura sites. For now, the changes in the Create Record Form, Record Banner, and Record Detail components are available only in your sandbox environment. Test the components, and see how they differ from your current Aura components. Your experience can help us fix any bugs that bubble up.

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

## Site Performance

Try the pilot for Experience Delivery, a powerful new infrastructure for hosting LWR sites, and see the improved performance, scalability, and security that it offers. Update references to your old \*.force.com site URLs in knowledge articles and external resources to ensure continued access to your sites when the redirection of legacy Salesforce domains ends in 2024.

### [Boost LWR Site Performance and Scalability with Experience Delivery \(Pilot\)](#)

Boost the performance and scalability of your LWR sites using Experience Delivery, a powerful new infrastructure for hosting LWR sites. Along with subsecond page load times, this new infrastructure provides improved security and search engine optimization (SEO) to ensure that your site meets your customers' demands.


### [Update References to Your Force.com Site URLs](#)

To ensure continued access to your sites when the temporary redirection of legacy Salesforce domains ends in 2024, update references to your old \*.force.com site URLs. Look for references to those domains in Salesforce, such as in a knowledge article, and outside Salesforce, such as links in your marketing materials.

## Boost LWR Site Performance and Scalability with Experience Delivery (Pilot)

Boost the performance and scalability of your LWR sites using Experience Delivery, a powerful new infrastructure for hosting LWR sites. Along with subsecond page load times, this new infrastructure provides improved security and search engine optimization (SEO) to ensure that your site meets your customers' demands.

**Where:** This change applies to [all LWR sites](#) accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, and Unlimited editions. Developer Edition is unsupported.

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

**Why:** Existing LWR sites use client-side rendering (CSR), meaning that all the HTML, JavaScript, CSS, and assets that make up the page are downloaded to the client before being rendered in the browser.

By contrast, Experience Delivery uses server-side rendering (SSR) and a dedicated content delivery network (CDN) to render the page on the server and then cache it in the CDN. This approach provides optimal site performance with page load times up to 60% faster, which leads to increased conversions and lower bounce rates.

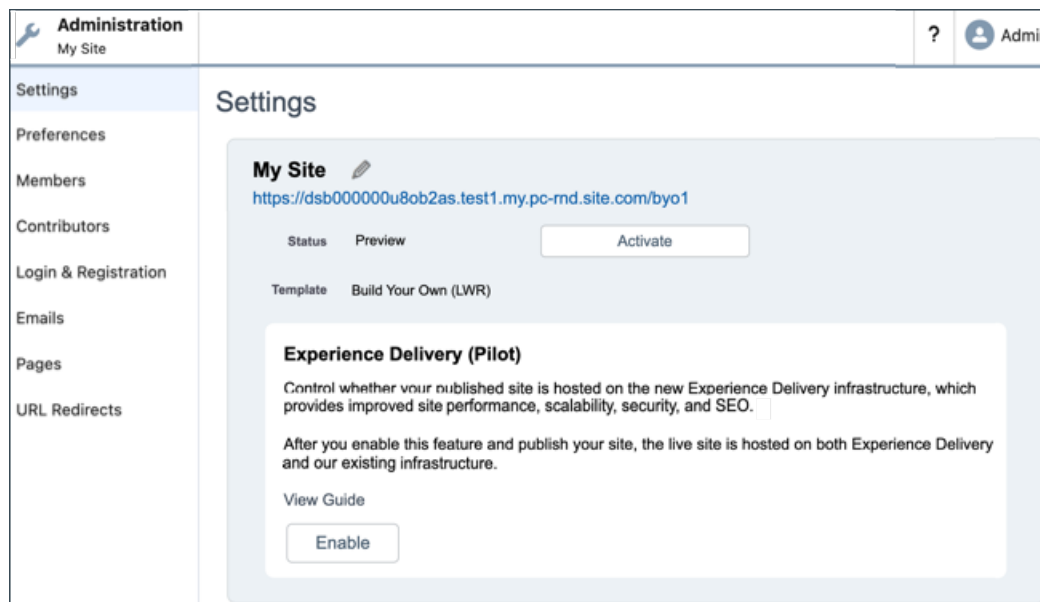
Experience Delivery also:

- Enhances SEO by rapidly serving fresh data to web crawlers and bots
- Scales to ensure consumer grade performance for high-traffic LWR sites
- Provides distributed denial-of-service (DDoS) protection, managed firewall rules, and managed rate-limiting rules for added security

**How:** To participate in this pilot, contact your Salesforce account executive. This pilot is aimed at developers who are comfortable:

- Building LWR or enhanced LWR sites with Experience Builder
- Developing custom Lightning web components that are server-side ready
- Using a custom domain for the site
- Working with Salesforce DX

After your org is approved for the pilot, you can enable Experience Delivery at the site level in the Settings tab of the site's Administration workspace. Experience Delivery is supported in new and existing LWR and enhanced LWR sites.



## Update References to Your Force.com Site URLs

To ensure continued access to your sites when the temporary redirection of legacy Salesforce domains ends in 2024, update references to your old \*.force.com site URLs. Look for references to those domains in Salesforce, such as in a knowledge article, and outside Salesforce, such as links in your marketing materials.



**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:

[Update References to Your Previous Salesforce Domains](#)

## Mobile Publisher for Experience Cloud

Prompt users to authenticate with biometric credentials to access features in your Mobile Publisher for Experience Cloud app. Mobile Publisher now requires the Admin SDK private key and config file from your app's Google Firebase project.

[Update Your Mobile Publisher for Experience Cloud App's Information for Android Push Notifications](#)

Because of a change in how Google handles push notifications for Android apps, Mobile Publisher now requires the Admin SDK private key and config file from your app's Google Firebase project.

[Configure Biometric ID Checks for Your Mobile Publisher for Experience Cloud App](#)

Mobile Publisher for Experience Cloud apps now support the BiometricsService API, which you can use in a custom Lightning web component that prompts users to authenticate with biometric credentials before they can access certain features.

## Update Your Mobile Publisher for Experience Cloud App's Information for Android Push Notifications

Because of a change in how Google handles push notifications for Android apps, Mobile Publisher now requires the Admin SDK private key and config file from your app's Google Firebase project.

**Where:** This change applies to apps created with Mobile Publisher for [Aura and LWR sites](#) in Enterprise, Performance, Unlimited, and Developer editions.

SEE ALSO:

[Avoid Disrupting Your Mobile Publisher Android App's Push Notifications](#)

## Configure Biometric ID Checks for Your Mobile Publisher for Experience Cloud App

Mobile Publisher for Experience Cloud apps now support the BiometricsService API, which you can use in a custom Lightning web component that prompts users to authenticate with biometric credentials before they can access certain features.

**Where:** This change applies to apps created with Mobile Publisher for [Aura and LWR sites](#) in Enterprise, Performance, Unlimited, and Developer editions.

SEE ALSO:

[Add Biometric ID Checks for Mobile Publisher for Experience Cloud App Features](#)

## Security and Sharing

Prepare for updates to format requirements for trusted URLs that define your site's content security policy, which are designed to help prevent code injection attacks. Learn about security and usability updates and a new authorization flow for Salesforce Customer Identity. The Salesforce-managed app for the Twitter authentication provider is no longer supported.

### [Prepare for Upcoming CSP Changes](#)

To help prevent code injection attacks, Salesforce plans to update the system-defined trusted URLs that define your site's content security policy (CSP) in Winter '25. Prepare for this change by reviewing the impacted resources and updating your trusted URLs.

### [Identity and Access Management Enhancements for Experience Cloud](#)

For Salesforce Customer Identity, take advantage of security and usability updates and a new authorization flow.

### [Built-In Salesforce-Managed App for the Twitter Authentication Provider Is Being Retired](#)

The Salesforce-managed app for the Twitter authentication provider is being retired in Spring '24. To ensure that your users can still log in to your Experience Cloud site via single sign-on (SSO) with X (formerly known as Twitter), update your authentication provider configuration.

### [Record Access Is Secure by Default after Enabling Digital Experiences](#)

In Salesforce orgs created on February 8, 2024 or later, after you enable digital experiences, records shared with the Roles and Internal Subordinates group through sharing rules or other features remain accessible only to those internal users. In orgs created before February 8, 2024, records shared with internal users are still made available to external site users automatically, and you must use the Convert External User Access wizard to secure access.

## Prepare for Upcoming CSP Changes

To help prevent code injection attacks, Salesforce plans to update the system-defined trusted URLs that define your site's content security policy (CSP) in Winter '25. Prepare for this change by reviewing the impacted resources and updating your trusted URLs.

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

SEE ALSO:

[Update Your Content Security Policy \(CSP\) for Upcoming Changes](#)

## Identity and Access Management Enhancements for Experience Cloud

For Salesforce Customer Identity, take advantage of security and usability updates and a new authorization flow.

**Where:** These changes apply to [LWR, Aura, and Visualforce sites](#) accessed through Lightning Experience and Salesforce Classic. Most of the changes are available in Enterprise, Performance, Unlimited, and Developer editions, except for the update to headless identity flows, which is available only in Enterprise, Unlimited, and Developer editions.

**How:** For more information about these changes, see these release notes.

- [Monitor Changes to Login Pages in the Setup Audit Trail](#)
- [Expand Branding Options and Improve Security for Headless Identity Flows](#)
- [Find Experience Cloud SAML Endpoints More Easily](#)
- [Improve Compatibility with Third-Party Services with the Token Exchange Flow](#)

## Built-In Salesforce-Managed App for the Twitter Authentication Provider Is Being Retired

The Salesforce-managed app for the Twitter authentication provider is being retired in Spring '24. To ensure that your users can still log in to your Experience Cloud site via single sign-on (SSO) with X (formerly known as Twitter), update your authentication provider configuration.

**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:

[Salesforce-Managed App for the Twitter Authentication Provider is Being Retired](#)

## Record Access Is Secure by Default after Enabling Digital Experiences

In Salesforce orgs created on February 8, 2024 or later, after you enable digital experiences, records shared with the Roles and Internal Subordinates group through sharing rules or other features remain accessible only to those internal users. In orgs created before February 8, 2024, records shared with internal users are still made available to external site users automatically, and you must use the Convert External User Access wizard to secure access.

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

**Why:** For orgs created before February 8, 2024, the previous behavior is applied when you enable digital experiences, so that records shared with the Roles and Subordinates group are automatically shared with Roles, Internal and Portal Subordinates. To secure your org's data, you must remove access for external users with the Convert External User Access wizard and manual updates.

SEE ALSO:

[Salesforce Help: Use the Convert External User Access Wizard \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Considerations for the Convert External User Access Wizard \(can be outdated or unavailable during release preview\)](#)

## Other Changes

Learn about changes to Chatter group member counts.

[Chatter Group Member Count Is Updated Only When Member Group Processing Is Complete](#)

Chatter group member counts are no longer updated if the Chatter group is in the process of being removed or added to a site. Member counts are updated only after the Chatter group update has finished processing.

## Chatter Group Member Count Is Updated Only When Member Group Processing Is Complete

Chatter group member counts are no longer updated if the Chatter group is in the process of being removed or added to a site. Member counts are updated only after the Chatter group update has finished processing.

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

## Field Service

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See what's new in Field Service to help your team deliver on performance and customer service.

[Einstein](#)

Discover innovative, AI-based features to help your teams deliver exceptional service.

### [Field Service Resource Management](#)

Explore the latest features to help dispatchers create, manage, and optimize your team's schedule.

### [Field Service Operations](#)

Streamline, extend, and customize your Field Service operations with these new additions.

### [Field Service Customer Engagement](#)

Enhance and elevate your customer interactions with these new features.

### [Field Service Mobile](#)

Explore what's new in Field Service mobile, designed to help mobile workers provide outstanding service.

### [Spotlight on Field Service Content](#)

Discover high-impact content to help you get your Field Service work done.

## Einstein

Discover innovative, AI-based features to help your teams deliver exceptional service.

### [Get Started with Einstein Features for the Field Service Mobile App](#)

Create and assign the Einstein for Field Service Mobile permission set to let mobile workers use Einstein features in the Field Service mobile app.

### [Streamline Everyday Activities with Einstein Copilot on the Field Service Mobile App](#)

Ask Einstein to find records, summarize records, and gather information in a conversational and intuitive experience on the Field Service mobile app. Use Einstein on the Field Service mobile app as soon as it's enabled for your Salesforce org, with no setup needed. On iOS devices, use dictation to send messages in your Einstein Copilot experience.

### [Get Your Mobile Workers Up to Speed with Pre-Work Brief](#)


Show mobile workers an AI-generated brief that tells them everything they need to know about their upcoming work order. Previously, workers switched between all of the work order's tabs to find the relevant information.

## Get Started with Einstein Features for the Field Service Mobile App

Create and assign the Einstein for Field Service Mobile permission set to let mobile workers use Einstein features in the Field Service mobile app.

**Where:** This feature is available in Lightning Experience in Einstein 1 Field Service Edition with the Field Service managed package installed. The feature is available in the Field Service mobile app for Android and iOS. Einstein generative AI is available in Lightning Experience.

**How:** In Setup, go to Permission Sets. Create the permission set with the Einstein for Field Service Mobile license and assign it to users.

 **Note:** Einstein for Field Service Mobile is an add-on license. If the license doesn't appear, ask your Salesforce account executive for help.

SEE ALSO:

[Einstein Features](#)

## Streamline Everyday Activities with Einstein Copilot on the Field Service Mobile App

Ask Einstein to find records, summarize records, and gather information in a conversational and intuitive experience on the Field Service mobile app. Use Einstein on the Field Service mobile app as soon as it's enabled for your Salesforce org, with no setup needed. On iOS devices, use dictation to send messages in your Einstein Copilot experience.

**Where:** This change applies to Lightning Experience and the Field Service mobile app for iOS and Android in Enterprise, Performance, and Unlimited editions with the Einstein for Service add-on. Setup for Einstein Copilot is available on desktop.

**When:** Einstein Copilot on the Field Service mobile app is generally available from May 6, 2024.

SEE ALSO:

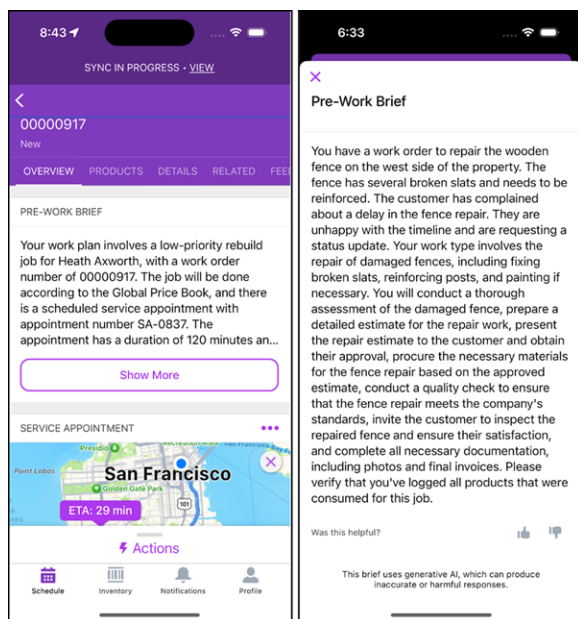
[Einstein Copilot \(Beta\)](#)

## Get Your Mobile Workers Up to Speed with Pre-Work Brief

Show mobile workers an AI-generated brief that tells them everything they need to know about their upcoming work order. Previously, workers switched between all of the work order's tabs to find the relevant information.

**Where:** This feature is available in Lightning Experience in Einstein 1 Field Service Edition with the Field Service managed package installed. The feature is available in the Field Service mobile app for Android and iOS. Einstein generative AI is available in Lightning Experience.

**How:** Create the Einstein for Field Service Mobile permission set, enable Pre-Work Brief, and assign it to specific users. Then, ask your mobile workers to pay attention to the brief at the top of each work order. Mobile workers can also provide feedback about the brief.



SEE ALSO:

[Salesforce Help: Set Up Pre-Work Brief](#)

[Einstein Features](#)

# Field Service Resource Management

Explore the latest features to help dispatchers create, manage, and optimize your team's schedule.

## [Enhanced Scheduling and Optimization](#)

If you used Salesforce prior to Summer '23, you can easily upgrade all service territories to use Enhanced Scheduling and Optimization with guided steps that now include additional checks. Configure enhanced scheduled jobs by service territory using a new Apex class API. The Count work rule now limits your mobile workers' workload throughout the day to ensure that they aren't overburdened. And, resolve schedule overlaps using an automated flow.

## [Work Capacity](#)

Improve schedule flexibility by relaxing work capacity limits near or on the day of service and easily change a daily limit for a specific date. Increase dispatcher productivity by sharing work capacity object records with users who have access permissions to the relevant service territories.

## [Get Notified When Automated Bundling Fails](#)

Receive an email for failed Automated Bundling optimization requests. Previously, you had to open the Optimization Requests tab to see this information.

## [Identify Configuration Issues More Efficiently with the Redesigned Health Check User Interface](#)

Health Check now provides an improved interface that better reflects the status of the tests it runs and allows you to easily filter results according to their status.

## [Experience Better Performance with Service Appointment List Filtering \(Beta\)](#)

Reduce loading time and get more accurate results by enabling the new filter appointments setting. The setting allows efficient filtering of the service appointment list in the dispatcher console when you're working with large datasets. Previously, large dataset filtering resulted in errors and required redefining the filter.

## [Control User Access with Operating Hours Sharing](#)

Sharing is now enabled and sharing settings are available for Operating Hours. Manage your sharing settings, including Org Wide Defaults, Sharing Rules, and Guest Sharing, on operating hours similar to other Salesforce objects that support sharing.

## [View More Shifts on the Schedule with a Minimalist Design](#)

See more shifts on the schedule with a sleek new design. We removed the +New Shift button to declutter the shift schedule view. Now, just click the white space to add a shift.

## Enhanced Scheduling and Optimization

If you used Salesforce prior to Summer '23, you can easily upgrade all service territories to use Enhanced Scheduling and Optimization with guided steps that now include additional checks. Configure enhanced scheduled jobs by service territory using a new Apex class API. The Count work rule now limits your mobile workers' workload throughout the day to ensure that they aren't overburdened. And, resolve schedule overlaps using an automated flow.

## [Get Additional Guidance When Transitioning to Enhanced Scheduling and Optimization](#)

Easily upgrade all service territories to use Enhanced Scheduling and Optimization with guided steps comprising a readiness check and links to Salesforce Help. This transparency helps users prior to Summer '23 adopt Enhanced Scheduling and Optimization and benefit from innovative features, more efficient services, and improved scalability, performance, and schedule quality. The readiness check now includes two additions: addressing scheduling overlaps by enabling the new automated Fix Schedule Overlaps flow (Beta), and considering differences in behavior in the Service Resource Availability work rule. When using Enhanced Scheduling and Optimization, make sure to include values for the Travel From Home and Travel To Home fields in this work rule.

### [Configure Scheduled Jobs Easily with Enhanced Optimization APIs](#)

Fine-tune the configuration of optimization jobs scheduled via Enhanced Optimization by using the new `FSL.ScheduleJobsApi` Apex class. With this Apex class, you can modify the list of territory groups and their related scheduling policies for a specific job for easier job-to-territory matching.

### [Limit Your Mobile Worker's Cumulative Workload Throughout the Day](#)

Prevent overloading your mobile workers, or their vehicles, by restricting appointment scheduling based on assignments, hours worked, or a custom value. The Count work rule on a custom field now considers the order of scheduled appointments, ensuring that your workers don't exceed the set limit at any point of the day. Previously, the count limitation was applied on a full day horizon, allowing workers to exceed the limit during the day as long as the limit was met at the end of the day.

### [Fix Schedule Overlaps Easily with an Automated Scheduling Flow \(Beta\)](#)

Tackle scheduling challenges with an automated flow that optimizes resource schedules to resolve overlaps that occur due to an appointment ending late. Use the flow template recommendations, or adjust the template to suit your use case.

### [Evaluate Service Appointment Candidates Efficiently by Prioritizing Skill Preferences](#)

Identify the best-qualified candidates when optimizing your schedule by using the new Skill Preference service objective. Find candidates with a skill of a certain skill type that reflects the service appointment's skill preferences. For example, a service appointment requires a caregiver who speaks English or Spanish but the preferred choice is Spanish. Previously, the candidates included English or Spanish speakers without ranking them.

## Get Additional Guidance When Transitioning to Enhanced Scheduling and Optimization

Easily upgrade all service territories to use Enhanced Scheduling and Optimization with guided steps comprising a readiness check and links to Salesforce Help. This transparency helps users prior to Summer '23 adopt Enhanced Scheduling and Optimization and benefit from innovative features, more efficient services, and improved scalability, performance, and schedule quality. The readiness check now includes two additions: addressing scheduling overlaps by enabling the new automated Fix Schedule Overlaps flow (Beta), and considering differences in behavior in the Service Resource Availability work rule. When using Enhanced Scheduling and Optimization, make sure to include values for the Travel From Home and Travel To Home fields in this work rule.

**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 the Field Service Admin app, go to Field Service Settings. Select **Getting Started**, and then select the Home tab, or go directly to the Activation page under Optimization. Click **Run Readiness Check**. Review the information, click to learn more in Salesforce Help, and then enable Enhanced Scheduling and Optimization for all service territories.

**Optimization**

ACTIVATION | LOGIC | SCHEDULED JOBS | ADVANCED PARAMETERS

### Enhanced Scheduling and Optimization

Improve scalability, performance and schedule quality with Enhanced Scheduling and Optimization. The architecture and services are more efficient and improve scalability, performance and schedule quality.

Before using Enhanced Scheduling and Optimization, let's check if there are any issues that need to be resolved. We recommend testing the optimization first in a sandbox environment.

Run Readiness Check | Watch Video

**Update Your Configuration**

These features require configuration changes to work with Enhanced Scheduling and Optimization.

- Scheduling and optimization services** contain DML. Split the scheduling flow to first create the service appointment and then schedule it. [Learn in Help](#)
- Custom Triggers** must be optimized by running async processes. [Learn in Help](#)
- Service Resource Availability work rule** must include values for the Travel From Home and Travel To Home fields. [Learn in Help](#)
- Fix Schedule Overlaps flow (Beta)** can be enabled. [Enable Flow](#) | [Learn in Help](#)
- Designated Work Time Slots** must be of type Recordset Filter Criteria and not boolean. [Learn in Help](#)
- Remote Site** must be activated. [Activate Remote Site](#) | [Learn in Help](#)

**Review Partially Supported Features**

These features are in use but aren't fully supported with Enhanced Scheduling and Optimization. To see what's available, go to [Help](#).

- Custom Objectives, Reshuffle and Fill In Schedule** [Learn in Help](#)
- Schedule Over Lower Priority Appointment** [Learn in Help](#)
- Fix Overlaps** use resource optimization instead. [Learn in Help](#)
- Group Nearby** use resource optimization instead. [Learn in Help](#)
- Low Coverage Countries** point-to-point predictive travel supported only in navigable regions. [Learn in Help](#)

**Consider Differences In Behavior**

Pay attention to how these features behave when using Enhanced Scheduling and Optimization.

- Point-To-Point Predictive Travel** includes toll roads by default. [Learn in Help](#)
- Different Travel Times** can affect existing service appointments. [Learn in Help](#)
- Resource Efficiency** is rounded up. [Learn in Help](#)
- Complex Work** with an Immediately Follow dependency might work differently. [Learn in Help](#)
- Rule Violations** are fixed or the violating appointments are removed from the Gantt. [Learn in Help](#)
- Scheduling Policy** might require fine-tuning. [Learn in Help](#)

**Turn on Enhanced Scheduling and Optimization**

Now that you've finished checking everything, you're ready to go. Enhanced Scheduling and Optimization applies to all of your service territories. [Enable](#)

## SEE ALSO:

[Salesforce Help: Transition to Enhanced 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)

[Salesforce Help: Work Rule Type: Service Resource Availability](#) (can be outdated or unavailable during release preview)

[Salesforce Help: Fix Overlaps Using an Automated Scheduling Flow \(Beta\)](#) (can be outdated or unavailable during release preview)

[Fix Schedule Overlaps Easily with an Automated Scheduling Flow \(Beta\)](#) (can be outdated or unavailable during release preview)

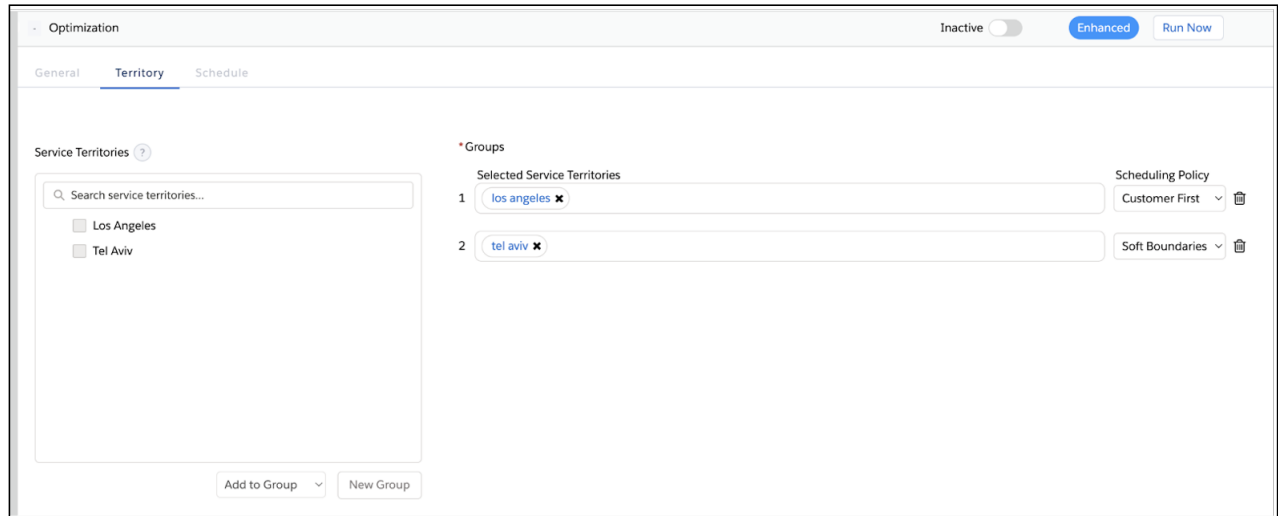
## Configure Scheduled Jobs Easily with Enhanced Optimization APIs

Fine-tune the configuration of optimization jobs scheduled via Enhanced Optimization by using the new `FSLScheduleJobsApi` Apex class. With this Apex class, you can modify the list of territory groups and their related scheduling policies for a specific job for easier job-to-territory matching.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions with the Field Service managed package installed.

**How:** View territories modified by `FSLScheduleJobsAPI` in the Field Service Admin app. From Field Service Settings, go to the Scheduled Jobs tab under Optimization. View the territories for the scheduled job under the Territory tab.





## Limit Your Mobile Worker's Cumulative Workload Throughout the Day

Prevent overloading your mobile workers, or their vehicles, by restricting appointment scheduling based on assignments, hours worked, or a custom value. The Count work rule on a custom field now considers the order of scheduled appointments, ensuring that your workers don't exceed the set limit at any point of the day. Previously, the count limitation was applied on a full day horizon, allowing workers to exceed the limit during the day as long as the limit was met at the end of the day.

**Where:** This change applies to Lightning Experience and Salesforce Classic in Enterprise, Unlimited, and Developer editions with the Field Service managed package installed.

**Why:** Here's an example of how this change helps you avoid overburdening your mobile workers. You have a custom field that checks the capacity of your workers' vehicles, and the Count work rule is set to 10. Throughout the day, a worker picks up five units, picks up another eight units, and then drops off four units. The Count work rule now registers this violation on the second service appointment and on all the following appointments that day. Previously, this count wasn't registered as a rule violation, even though 13 items existed at a certain point in the day.

**How:** In Setup, go to Field Service Settings and verify that Field Service Enhanced Scheduling and Optimization is enabled. Add the Count work rule to a scheduling policy from the Customize Scheduling Policies page in Guided Setup or the Scheduling Policy Work Rule related list.


SEE ALSO:

[Salesforce Help: Work Rule Type: Count Rule \(can be outdated or unavailable during release preview\)](#)

## Fix Schedule Overlaps Easily with an Automated Scheduling Flow (Beta)

Tackle scheduling challenges with an automated flow that optimizes resource schedules to resolve overlaps that occur due to an appointment ending late. Use the flow template recommendations, or adjust the template to suit your use case.

**Where:** This feature is available in Lightning Experience and Salesforce Classic in Enterprise, Unlimited, and Developer editions with the Field Service managed package installed.

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

**How:** In Setup, go to Field Service Settings and verify that Field Service Enhanced Scheduling and Optimization is enabled. In the Field Service Admin app, go to Field Service Settings and select **Scheduling**. In the General Logic tab, select **Enable the Fix Schedule**

**Overlaps flow (Beta)** and update the flow API name. Then in Setup, go to Process Automation and select **Flows**. Open the Fix Schedule Overlaps flow and use it as is, or save a copy of the flow template and modify it as needed.

SEE ALSO:

[Salesforce Help: Transition to Enhanced Scheduling and Optimization \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Fix Overlaps Using an Automated Scheduling Flow \(Beta\) \(can be outdated or unavailable during release preview\)](#)

## Evaluate Service Appointment Candidates Efficiently by Prioritizing Skill Preferences

Identify the best-qualified candidates when optimizing your schedule by using the new Skill Preference service objective. Find candidates with a skill of a certain skill type that reflects the service appointment's skill preferences. For example, a service appointment requires a caregiver who speaks English or Spanish but the preferred choice is Spanish. Previously, the candidates included English or Spanish speakers without ranking them.

**Where:** This feature is available in Lightning Experience and Salesforce Classic in Enterprise, Unlimited, and Developer editions with the Field Service managed package installed.

**How:** In Setup, go to Field Service Settings and verify that Field Service Enhanced Scheduling and Optimization is enabled. Add the Skill Preference service objective to your scheduling policy from the Customize Scheduling Policies page in Guided Setup or the Scheduling Policy Objectives related list on a policy.

**New Service Objective**

Select a record type

- ASAP  
Schedule as soon as possible
- Custom Objective  
Custom Objective
- Minimize Overtime  
Minimize the use of overtime
- Minimize Travel  
Minimize travel time
- Preferred Resource  
Prioritize scheduling according to preferred resource
- Resource Priority  
Prefer a resource based on a field value on the resource
- Skill Level  
Prefer the least/most qualified candidate
- Skill Preference  
Skill Preference with skill type

Cancel Next

SEE ALSO:

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

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

## Work Capacity

Improve schedule flexibility by relaxing work capacity limits near or on the day of service and easily change a daily limit for a specific date. Increase dispatcher productivity by sharing work capacity object records with users who have access permissions to the relevant service territories.

### [Get More Scheduling Flexibility with Work Capacity Limit Relaxation](#)

Enable schedule changes close to or on the day of service by relaxing the work capacity limit and allowing work to be scheduled, even if it exceeds the limit for that day. For example, set a relaxation policy for the breakfix work type capacity limit that allows scheduling a same-day breakfix service call from 6 AM on the day of service, if availability exists, to enable additional breakfix work.

### [Update a Daily Work Capacity Limit to Meet Changing Needs](#)

Respond to unforeseen changes in demand by adjusting the work limit for a specific day using the daily work capacity cards. This change overrides the Work Capacity limit only for the selected day. For example, increase the limit for breakfix work for Monday next week to ensure response to a possible surge in demand due to forecasted severe weather conditions.

### [Share Work Capacity Records by Territory](#)

Provide users with read and write access to work capacity records for a territory. By sharing within a Field Service user territory, any user who is a member of the public group for that territory has permission to access the records. For example, give dispatchers access to oversee the relevant service territories end to end. Dispatchers can then schedule service appointments and identify why work capacity limits were exceeded for a specific service territory.

### [Optimize Workforce Utilization by Comparing Workstream Consumption](#)

Sort the Weekly Summary view to help planners identify in advance days where demand for a specific workstream is low compared to days where the workstream has almost reached the limit. You can sort the view alphabetically or by consumption. Planners can then adjust the daily limits accordingly. For example, let's assume you have a week with a daily limit of 100 hours for installation work and a 200-hour limit for breakfixes. Sorting the weekly view alphabetically can alert the planner if only 20 hours were consumed for installations while breakfixes have reached the 200-hour limit, preventing additional breakfixes from being scheduled. The planner can then decrease the limit for installations and increase the limit for breakfixes to ensure better resource utilization.

## Get More Scheduling Flexibility with Work Capacity Limit Relaxation

Enable schedule changes close to or on the day of service by relaxing the work capacity limit and allowing work to be scheduled, even if it exceeds the limit for that day. For example, set a relaxation policy for the breakfix work type capacity limit that allows scheduling a same-day breakfix service call from 6 AM on the day of service, if availability exists, to enable additional breakfix work.

**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 verify that Field Service Enhanced Scheduling and Optimization is enabled. In the Field Service Admin app select the relaxation policy.

SEE ALSO:

[Salesforce Help: Set Up Field Service Work Capacity \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Create a Work Capacity Limit \(can be outdated or unavailable during release preview\)](#)

## Update a Daily Work Capacity Limit to Meet Changing Needs

Respond to unforeseen changes in demand by adjusting the work limit for a specific day using the daily work capacity cards. This change overrides the Work Capacity limit only for the selected day. For example, increase the limit for breakfix work for Monday next week to ensure response to a possible surge in demand due to forecasted severe weather conditions.

**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 verify that Field Service Enhanced Scheduling and Optimization is enabled.

SEE ALSO:

[Salesforce Help: Monitor Workstream Usage in Summary View \(can be outdated or unavailable during release preview\)](#)

## Share Work Capacity Records by Territory

Provide users with read and write access to work capacity records for a territory. By sharing within a Field Service user territory, any user who is a member of the public group for that territory has permission to access the records. For example, give dispatchers access to oversee the relevant service territories end to end. Dispatchers can then schedule service appointments and identify why work capacity limits were exceeded for a specific 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:** In Setup, go to Field Service Settings and verify that Field Service Enhanced Scheduling and Optimization is enabled. In the Field Service Admin app, make sure sharing by service territory and automatic population of user groups are enabled. Then enable sharing work capacity records according to service territory.

SEE ALSO:

[Salesforce Help: Set Up Field Service Work Capacity \(can be outdated or unavailable during release preview\)](#)

## Optimize Workforce Utilization by Comparing Workstream Consumption

Sort the Weekly Summary view to help planners identify in advance days where demand for a specific workstream is low compared to days where the workstream has almost reached the limit. You can sort the view alphabetically or by consumption. Planners can then adjust the daily limits accordingly. For example, let's assume you have a week with a daily limit of 100 hours for installation work and a 200-hour limit for breakfixes. Sorting the weekly view alphabetically can alert the planner if only 20 hours were consumed for installations while breakfixes have reached the 200-hour limit, preventing additional breakfixes from being scheduled. The planner can then decrease the limit for installations and increase the limit for breakfixes to ensure better resource utilization.

**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 verify that Field Service Enhanced Scheduling and Optimization is enabled.

SEE ALSO:

[Salesforce Help: Monitor Workstream Usage in Summary View \(can be outdated or unavailable during release preview\)](#)

## Get Notified When Automated Bundling Fails

Receive an email for failed Automated Bundling optimization requests. Previously, you had to open the Optimization Requests tab to see this information.

**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 Process Automation and select **Flows**. Open the Send Email for Automated Bundling Failures flow, and click **Activate**. Or, save a copy of the flow template, make your changes, and then activate the flow.

SEE ALSO:

[Salesforce Help: Set Up Automatic Bundling \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Monitor Field Service Schedule Optimization Requests \(can be outdated or unavailable during release preview\)](#)

## Identify Configuration Issues More Efficiently with the Redesigned Health Check User Interface

Health Check now provides an improved interface that better reflects the status of the tests it runs and allows you to easily filter results according to their status.

**Where:** This change applies to Lightning Experience and Salesforce Classic in Enterprise, Unlimited, and Developer editions with the Field Service managed package installed.


SEE ALSO:

[Salesforce Help: Test Your Field Service Configuration with Health Check \(can be outdated or unavailable during release preview\)](#)

## Experience Better Performance with Service Appointment List Filtering (Beta)

Reduce loading time and get more accurate results by enabling the new filter appointments setting. The setting allows efficient filtering of the service appointment list in the dispatcher console when you're working with large datasets. Previously, large dataset filtering resulted in errors and required redefining the filter.

**Where:** This change applies to Lightning Experience and Salesforce Classic in Enterprise, Unlimited, and Developer editions with the Field Service managed package installed.

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

**How:** In the Field Service Admin app, click the Field Service Settings tab and select **Dispatcher Console UI**. Then, enable advanced filtering for the service appointment list under Gantt Configurations. This setting is available only when the Enable Custom Filters setting is turned on.

SEE ALSO:

[Salesforce Help: Work in the Field Service Dispatcher Console \(can be outdated or unavailable during release preview\)](#)

## Control User Access with Operating Hours Sharing

Sharing is now enabled and sharing settings are available for Operating Hours. Manage your sharing settings, including Org Wide Defaults, Sharing Rules, and Guest Sharing, on operating hours similar to other Salesforce objects that support sharing.

**Where:** This feature is available in Lightning Experience in Enterprise, Unlimited, and Developer editions with the Field Service managed package installed.

**How:** If you're new to Salesforce Field Service this release, your Org Wide Default (OWD) for sharing is set to private. Existing customers retain user access to all operating hours records, and the OWD for sharing is automatically still set to public read/write. If you have guest users, we recommend creating guest-sharing rules post-release, so that operating hours are shared with all guest users.

## View More Shifts on the Schedule with a Minimalist Design

See more shifts on the schedule with a sleek new design. We removed the +New Shift button to declutter the shift schedule view. Now, just click the white space to add a shift.

**Where:** This change applies to Lightning Experience, Classic, and Mobile in Enterprise, Unlimited, and Developer editions with the Field Service managed package installed.

**How:** Click the white space in the calendar to add a new shift. Here's the new shift

## Field Service Operations

Streamline, extend, and customize your Field Service operations with these new additions.

### [Service Documents](#)

Showcase your branding, make your mobile workers' jobs more efficient, and build service documents faster with Document Builder, Field Service's new service document solution.

### [Asset Management](#)

Asset attributes are taking up less space and are now a useful tool when building lead time into maintenance work. Also, learn how you can optimize your Field Service implementation with the Field Service Data Kit.

## Service Documents

Showcase your branding, make your mobile workers' jobs more efficient, and build service documents faster with Document Builder, Field Service's new service document solution.

### [Create Richly Formatted Service Documents with Document Builder \(Generally Available\)](#)

This feature, now generally available, includes some changes since the last release. Express your business goals and branding, make it easier for your mobile workers to share information with customers, and build service documents faster with Document Builder. Document Builder provides components that you can drag onto the Template Builder to create service documents. Spend less time on upkeep with dynamic templates that can update numerous documents at once. Translate service documents, collect signatures, embed images, and generate and preview PDFs on your desktop and the Field Service mobile app. You can also add custom Lightning web components (LWCs) and use spanning fields to target polymorphic lookups.

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**Where:** This feature is available in Lightning Experience and Mobile in Enterprise, Unlimited, and Developer editions with the Field Service managed package installed.

**How:** To register your org, find Field Service Settings in Setup and select the **Enable Document Builder** checkbox. After you receive an email notification that you're registered, you can start creating service document templates. Only Salesforce admins, with access to the Setup menu, can access the builder experience and create service document templates.

SEE ALSO:

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

## Asset Management

Asset attributes are taking up less space and are now a useful tool when building lead time into maintenance work. Also, learn how you can optimize your Field Service implementation with the Field Service Data Kit.

### [Save Database Storage with Optimized Storage Space for Asset Attributes](#)

Now each asset attribute record takes up just 0.25 KB of storage, leaving you with more available database storage. Previously, each attribute record consumed 2 KB of storage.

### [Build In Accurate Maintenance Lead Time with Asset Attributes](#)

Prevent asset downtime and plan for parts, resources, and personnel. Leverage asset attributes to gauge maintenance lead time more accurately and guide the scheduling parameters of maintenance work orders based on the specific needs of your assets, equipment, and usage-based processes. Previously, you had to create custom fields to achieve this functionality.

### [Accelerate Your Field Service Implementation with Data Cloud](#)

Seamlessly shift to scale and reduce the cost of implementation with the Field Service Data Kit. The SFS out-of-the-box data bundle supports essential data structures and mappings related to assets, work orders, warrants, service contracts, resources, and product service campaigns. This ensures an efficient implementation effort and minimizes custom development needs, saving both time and resources.

### [Migrate from Maintenance Plan Frequency Fields to Maintenance Work Rules \(Release Update\)](#)

The Frequency and Frequency Type fields on the Maintenance Plan are being retired. To prepare for this retirement and take advantage of updated features, migrate your Frequency and Frequency Type data to Maintenance Work Rules. This update was first available in Summer '22 and was scheduled to be enforced in Winter '22, but we postponed the enforcement date to Winter '25.

## Save Database Storage with Optimized Storage Space for Asset Attributes

Now each asset attribute record takes up just 0.25 KB of storage, leaving you with more available database storage. Previously, each attribute record consumed 2 KB of storage.

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

SEE ALSO:

[Salesforce Help: Manage Field Service Asset Attributes \(can be outdated or unavailable during release preview\)](#)

## Build In Accurate Maintenance Lead Time with Asset Attributes

Prevent asset downtime and plan for parts, resources, and personnel. Leverage asset attributes to gauge maintenance lead time more accurately and guide the scheduling parameters of maintenance work orders based on the specific needs of your assets, equipment, and usage-based processes. Previously, you had to create custom fields to achieve this functionality.

**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: Manage Field Service Asset Attributes \(can be outdated or unavailable during release preview\)](#)

## Accelerate Your Field Service Implementation with Data Cloud

Seamlessly shift to scale and reduce the cost of implementation with the Field Service Data Kit. The SFS out-of-the-box data bundle supports essential data structures and mappings related to assets, work orders, warrants, service contracts, resources, and product service campaigns. This ensures an efficient implementation effort and minimizes custom development needs, saving both time and resources.

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

SEE ALSO:

[Salesforce Help: Get Started with Data Cloud \(can be outdated or unavailable during release preview\)](#)

## Migrate from Maintenance Plan Frequency Fields to Maintenance Work Rules (Release Update)

The Frequency and Frequency Type fields on the Maintenance Plan are being retired. To prepare for this retirement and take advantage of updated features, migrate your Frequency and Frequency Type data to Maintenance Work Rules. This update was first available in Summer '22 and was scheduled to be enforced in Winter '22, but we postponed the enforcement date to Winter '25.

**Where:** This feature is available in Lightning Experience and Salesforce Classic in Enterprise, Unlimited, and Developer editions.

**When:** This release update is enforced in Winter '25. 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. In Winter '25, the retired fields will impact work order generation.

**How:** Find the release update in Setup. For Migration from Frequency Fields, follow the testing and activation steps.



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:

[Release Updates](#)

[Salesforce Knowledge Article: 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

Enhance and elevate your customer interactions with these new features.

### [Improve Your Data Security with Automated Visual Remote Assistant Image Deletion](#)

Retain only the data that you need by efficiently deleting unnecessary Visual Remote Assistant images using automation. Trigger an automated deletion process by creating custom criteria using a flow. Previously, you manually created a list of images and contacted Salesforce Customer Support.

### [Enhance Your Agent's Efficiency with Images in the Visual Remote Assistant's Visual History](#)

Your agents can now easily access and view self-service session images in the Visual Remote Assistants visual history, for improved customer satisfaction. Previously, agents could access these images only as standard attachment files in Salesforce.

### [Facilitate Payment for Services](#)

Create a flow that easily enables your customers to pay for services through a provided link, eliminating the need to contact customer services.

## Improve Your Data Security with Automated Visual Remote Assistant Image Deletion

Retain only the data that you need by efficiently deleting unnecessary Visual Remote Assistant images using automation. Trigger an automated deletion process by creating custom criteria using a flow. Previously, you manually created a list of images and contacted Salesforce Customer Support.

**Where:** This feature is available in Lightning Experience in Enterprise, Unlimited, and Developer editions.

**How:** Add an Apex action to your flow. For example, create criteria to find specific Visual Remote Assistant images and delete them.

SEE ALSO:

[Salesforce Help: Set Up Visual Remote Assistant for Field Service \(can be outdated or unavailable during release preview\)](#)

## Enhance Your Agent's Efficiency with Images in the Visual Remote Assistant's Visual History

Your agents can now easily access and view self-service session images in the Visual Remote Assistants visual history, for improved customer satisfaction. Previously, agents could access these images only as standard attachment files in Salesforce.

**Where:** This feature is available in Lightning Experience in Enterprise, Unlimited, and Developer editions.

SEE ALSO:

[Salesforce Help: Set Up Visual Remote Assistant for Field Service \(can be outdated or unavailable during release preview\)](#)

## Facilitate Payment for Services

Create a flow that easily enables your customers to pay for services through a provided link, eliminating the need to contact customer services.

**Where:** This feature is available in Lightning Experience in Enterprise, Unlimited, and Developer editions.

SEE ALSO:

[Salesforce Help: Integrate Pay Now with Field Service \(can be outdated or unavailable during release preview\)](#)

## Field Service Mobile

Explore what's new in Field Service mobile, designed to help mobile workers provide outstanding service.

### [Lightning Web Components](#)

Customize your UI with styles and tab bar enhancements to suit your business goals. Efficiently manage inventory tracking with barcode scanner. Interact with and use data more easily for your business tasks with the latest plug-ins.

### [Plan for the Discontinuation of Mobile Extension Toolkit \(Beta\)](#)

Mobile Extension Toolkit is scheduled for discontinuation in February 2025.

### [Switch the App Language to Support Hebrew \(Beta\)](#)

Get an improved user experience with right-to-left text support when switching to a Hebrew-language UI. From the device settings, go to the app, select Hebrew as the preferred language, and continue to enjoy the app as usual.

## Lightning Web Components

Customize your UI with styles and tab bar enhancements to suit your business goals. Efficiently manage inventory tracking with barcode scanner. Interact with and use data more easily for your business tasks with the latest plug-ins.

### [Customize Your Lightning Web Components with Styles](#)

Use the native Salesforce UI style, or choose your own to make your Lightning web components fit in or stand out, depending on your preferences.

### [Boost Productivity with a Customized Tab Bar and the Time Sheet Tab](#)

Use the Field Service Mobile App Builder to tailor the app's tab bar for your mobile workers and assign that configuration to profiles, now with time sheet support. Previously, time sheets were not available as a navigation tab.

### [Save Time and Improve Accuracy by Scanning Barcodes with Android Devices](#)

Get more out of the Field Service mobile app by creating a Lightning web component (LWC) that uses the Barcode Scanner plug-in. Then, in the Field Service mobile app, let the LWC use the device's native camera to scan a barcode. For example, use Barcode Scanner to help manage inventory. Previously, the plug-in was only available for iOS devices, and for Android you manually entered the barcode numbers.

### [Streamline Your Work by Extracting Textual Data from Images](#)

Extract text from images and convert it to editable text with a Lightning web component (LWC) that you create and the Optical Character Recognition (OCR) plug-in. Using the Field Service mobile app, let the LWC access the device's camera to scan an image. The OCR plug-in converts the image text, for example on a receipt, into digital text to reduce clicks and increase accuracy instead of relying on error-prone manual input.

### [Simplify How to Interact with Data with Near Field Communication](#)

Streamline business processes and accelerate data exchange by creating a Lightning web component (LWC) that uses the Near Field Communication (NFC) plug-in. The Field Service mobile app then uses the LWC to gather data, such as meter readings, in a secure transmission.

## Customize Your Lightning Web Components with Styles

Use the native Salesforce UI style, or choose your own to make your Lightning web components fit in or stand out, depending on your preferences.

**Where:** This feature applies to the Field Service mobile app for Android and iOS.

**How:** Lightning web components are styled to look like the Salesforce UI by default. To change this, select Override default styling in Field Service Settings. These components include input, datetime picker, checkbox toggle, checkbox button, textarea, combobox, checkbox group, radio group, progress bar, progress indicator, and button.

SEE ALSO:

[Salesforce Help: Customize and Extend the Field Service Mobile App with Lightning Web Components \(can be outdated or unavailable during release preview\)](#)

## Boost Productivity with a Customized Tab Bar and the Time Sheet Tab

Use the Field Service Mobile App Builder to tailor the app's tab bar for your mobile workers and assign that configuration to profiles, now with time sheet support. Previously, time sheets were not available as a navigation tab.

**Where:** This feature is available in the Field Service mobile app for iOS and Android.

SEE ALSO:

[Salesforce Help: Customize Tabs with the Field Service Mobile App Builder \(can be outdated or unavailable during release preview\)](#)

## Save Time and Improve Accuracy by Scanning Barcodes with Android Devices

Get more out of the Field Service mobile app by creating a Lightning web component (LWC) that uses the Barcode Scanner plug-in. Then, in the Field Service mobile app, let the LWC use the device's native camera to scan a barcode. For example, use Barcode Scanner to help manage inventory. Previously, the plug-in was only available for iOS devices, and for Android you manually entered the barcode numbers.

**Where:** This feature is available in the Field Service mobile app for Android and iOS.

SEE ALSO:

[Salesforce Help: Customize and Extend the Field Service Mobile App with Lightning Web Components](#)  
[Field Service Developer Guide: Scan Barcodes on a Mobile Device](#)

## Streamline Your Work by Extracting Textual Data from Images

Extract text from images and convert it to editable text with a Lightning web component (LWC) that you create and the Optical Character Recognition (OCR) plug-in. Using the Field Service mobile app, let the LWC access the device's camera to scan an image. The OCR plug-in converts the image text, for example on a receipt, into digital text to reduce clicks and increase accuracy instead of relying on error-prone manual input.

**Where:** This feature is available in the Field Service mobile app for Android and iOS.

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[Salesforce Help: Customize and Extend the Field Service Mobile App with Lightning Web Components \(can be outdated or unavailable during release preview\)](#)

## Simplify How to Interact with Data with Near Field Communication

Streamline business processes and accelerate data exchange by creating a Lightning web component (LWC) that uses the Near Field Communication (NFC) plug-in. The Field Service mobile app then uses the LWC to gather data, such as meter readings, in a secure transmission.

**Where:** This feature is available in the Field Service mobile app for Android.

SEE ALSO:

[Salesforce Help: Customize and Extend the Field Service Mobile App with Lightning Web Components \(can be outdated or unavailable during release preview\)](#)

## Plan for the Discontinuation of Mobile Extension Toolkit (Beta)

Mobile Extension Toolkit is scheduled for discontinuation in February 2025.

**Where:** This change applies to the Field Service mobile app for Android and iOS.

SEE ALSO:

[Knowledge Article: Get Ready for the Discontinuation of the Mobile Extension Toolkit \(Beta\)](#)

## Switch the App Language to Support Hebrew (Beta)

Get an improved user experience with right-to-left text support when switching to a Hebrew-language UI. From the device settings, go to the app, select Hebrew as the preferred language, and continue to enjoy the app as usual.

**Where:** This change applies to the Field Service mobile app for Android and iOS.

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

SEE ALSO:

[Salesforce Help: Right-to-Left \(RTL\) Language Support \(can be outdated or unavailable during release preview\)](#)

## Spotlight on Field Service Content

Discover high-impact content to help you get your Field Service work done.

### [Simplify Setup Tasks with Landing Pages](#)

The Field Service learning map is now available in Help, designed as landing pages to guide you as you set up Field Service. The landing pages in Help are translated and provide useful insights with Salesforce analytics that give you the best learning and setup experience. Previously, the Field Service learning map was available only in English, with limited information on user journeys.

## Simplify Setup Tasks with Landing Pages

The Field Service learning map is now available in Help, designed as landing pages to guide you as you set up Field Service. The landing pages in Help are translated and provide useful insights with Salesforce analytics that give you the best learning and setup experience. Previously, the Field Service learning map was available only in English, with limited information on user journeys.

**Where:** This change applies to Lightning Experience and Salesforce Classic in Enterprise, Unlimited, and Developer editions and in the Field Service mobile app for Android and iOS.

SEE ALSO:

[Salesforce Help: Where Do I Start with Field Service? \(can be outdated or unavailable during release preview\)](#)

## Hyperforce

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

### [Access Salesforce in More Regions with Hyperforce](#)

With Hyperforce, you can choose from a growing number of worldwide regions to host your Salesforce org. Hyperforce gives you more choice and control over data residency.

### [Migrate to Hyperforce with Hyperforce Assistant \(Generally Available\)](#)

You can migrate to Hyperforce with help from Hyperforce Assistant. The assistant is now generally available for Salesforce production and sandbox orgs. The Prepare page guides you to the Salesforce Optimizer tool, and an updated IP allowlist section includes recommendations for using mTLS or 2-way SSL with IP domains. Additionally, we updated the Marketing Cloud connections section with the latest product names.

## Access Salesforce in More Regions with Hyperforce

With Hyperforce, you can choose from a growing number of worldwide regions to host your Salesforce org. Hyperforce gives you more choice and control over data residency.

**Where:** Delivery via Hyperforce of the Salesforce Customer 360 application suite, including Sales Cloud, Service Cloud, B2B Commerce, Platform, and Industries Cloud is newly available in South Korea and Sweden. It continues to be available in Australia, Canada, France, Germany, India, Indonesia, Italy, Japan, Singapore, the United Kingdom, and the United States. The Salesforce Customer 360 application suite is available on Hyperforce by request only in Switzerland and the United Arab Emirates. Additionally, these products are available on Hyperforce where noted.

Cloud	Product or Feature	Description	Available In
Marketing	Data Cloud	Salesforce Data Cloud can help keep you focused with a single source of truth, providing more	Germany, India, United States

Cloud	Product or Feature	Description	Available In
		intelligent, actionable, and trusted data.	
Marketing	Marketing Cloud Engagement	Marketing Cloud Engagement helps build customer relationships efficiently with personalized marketing messages and automated journeys.	Australia, India, Japan
Industries	Einstein Relationship Insights	Supercharge sales with intelligent relationship discovery. Automate account and contact research, visualize relationship networks, and connect with key decision-makers faster.	United States
Analytics	CRM Analytics	CRM Analytics, previously called Tableau CRM, is a cloud-based platform for connecting data from multiple sources, creating interactive analytics on that data, and sharing those views in apps. CRM Analytics is a better way to distribute insights to business users so that they can understand and act on changing information.	Australia, Brazil, Canada, France, Germany, India, Indonesia, Italy, Japan, Singapore, South Korea, Sweden, United Kingdom, United States
Sales	Einstein Activity Capture	Einstein Activity Capture is a productivity-boosting tool that helps keep data between Salesforce and your email and calendar applications up to date.	Germany, United States
Sales, Service	Einstein Conversation Insights	Einstein Conversation Insights offers the ability to see insights and trends surfaced from voice and video calls.	Germany, United States
Sales	Inbox	Salesforce Inbox shows you relevant Salesforce records alongside your email and events and lets you relate email messages to Salesforce, keeping your teammates up to date with your communications.	Germany, United States
Sales	Sales Engagement	Accelerate your inside sales process with	Germany, United States

Cloud	Product or Feature	Description	Available In
		productivity-boosting features and automation tools.	

## Migrate to Hyperforce with Hyperforce Assistant (Generally Available)

You can migrate to Hyperforce with help from Hyperforce Assistant. The assistant is now generally available for Salesforce production and sandbox orgs. The Prepare page guides you to the Salesforce Optimizer tool, and an updated IP allowlist section includes recommendations for using mTLS or 2-way SSL with IP domains. Additionally, we updated the Marketing Cloud connections section with the latest product names.

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

**How:** From Setup, in the Quick Find Box, enter *Hyperforce Assistant* and then select **Hyperforce Assistant**.

## Industries

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Industries solutions shape Salesforce to the needs of your business, reducing the need for you to customize things yourself. Streamline delivery and distribution processes and run better promotions with Consumer Goods Cloud. Create and execute financial plans with Financial Services Cloud. Health Cloud optimizes home visit scheduling and offers new ways to view, update, and create care plans. Run better promotions and boost member engagement with Loyalty Management. Net Zero Cloud streamlines disclosure management and reporting. Boost caseworker efficiency and reduce administrative burden with Public Sector Solutions. Manage mentoring programs, learning programs, and learning courses with Learning Wizard in Salesforce for Education. We also have plenty of changes for Automotive Cloud, Manufacturing Cloud, Salesforce for Nonprofits, Industries common features, and many more.

### [Automotive Cloud](#)

Engage with your captive finance customers and offer comprehensive service related to automotive loans and leases. Use the Finance Console for Automotive app to delight and engage your customers, track their financial activities, and upsell financial products. Extend fleet management and captive finance capabilities to partners and customers. Automatically map fields between lead and opportunity child records when you convert a lead into an opportunity. Use the new and updated fields on Vehicle and Vehicle Definition to easily define car attributes.

### [Communications Cloud](#)

Communications Cloud extends Salesforce Customer 360 to provide a solution specifically for the communications industry. It helps businesses digitally transform to deliver new, industry-standard customer experiences while increasing operational efficiencies. Explore an industry-specific application suite and a range of cloud solutions including Digital Commerce, Industries Order Management, Contract Lifecycle Manage, Order Capture, Configure, Price, Quote (Industries CPQ), and Enterprise Product Catalog (EPC).

### [Consumer Goods Cloud](#)

Provide closed loop promotion planning and execution framework by integrating Trade Promotion Management promotions with Retail Execution. Define business years with more flexibility and customize the way time is aggregated within your business.

### [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.

### Financial Services Cloud

Create and execute a financial plan to reach a financial goal. Organize and unify data across Salesforce and other external data sources using Data Cloud. A new setting lets you change the way that you share mortgage records, including residential loan applications. Quickly sync events organized by users external to Salesforce and automatically create interaction participant records during an Interaction event sync. Enrich transactions with merchant-related information and define business rules to deflect transactions that don't satisfy specified criteria. Configure merchant alerts for disputed transactions, and enable your customers to raise transaction disputes in a self-service portal. Learn about these and other Financial Services Cloud features. Learn about these and other Financial Services Cloud features.

### Health Cloud

Home Health optimizes visit scheduling and now supports group visits and dependent visits. Integrated Care Management supports more ways to create, update, and view care plans. Provider Search has a new FlexCard that supports more targeted searches across more data. Referral Management has a new guided process to boost referral numbers and new dashboards to get greater insights into referral trends. Use new and updated user interfaces to track assessments better.

### Insurance

Insurance connects frontline agents, back-office teams, and customers with flexible components that support policy administration, benefit administration, claims, and billing.

### Loyalty Management

Leverage the capabilities of Global Promotions Management to bring your brand's promotion strategy to life within minutes. Offer games like Spin the Wheel and Scratchcard as program rewards to members. Focus on the most important aspects of your loyalty program on the refreshed Loyalty Program page. Use the new filter options in the Liability Forecast dashboard to get a more focused view of your loyalty program's liability.

### Manufacturing Cloud

Quickly compare metrics across different schedules in sales agreements and experience greater ease in managing your data. Closely monitor your inventory stock and movement by using the new inventory management objects. Set up a search experience to manage and plan your inventory. Efficiently import program and variant forecasts from CSV files to generate component production forecasts.

### 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.

### Net Zero Cloud

Make disclosure report filing easier by authoring reports directly in Microsoft 365 Word. Retrieve disclosure responses from the previous year by using clause library. Align with reporting requirements from organizations like CDP by categorizing emissions into individual greenhouse gases. Enhance emissions calculations from electricity usage for stationary assets by applying market-based or location-based emission factors or both.

### Public Sector Solutions

Review benefit eligibility when circumstances change and adjust disbursements. Easily refer constituents to providers by using a guided flow. Gain insights into caseload trends and community impact and boost caseworker efficiency. Speed up complaint filing for judicial and investigative cases, and enable constituents to raise service requests on the public portal to reduce administrative burden.

### Rebate Management

Capture your discounts in your special pricing terms and benefits with greater accuracy, and view more decimal places for sales and reference prices. Precisely evaluate your financial obligations for a rebate program by specifying more specific accrual rates in rebate types. Quickly transfer rebate claim, ship and debit claim, and transaction receipt details from CSV files to Salesforce.



### [Referral Marketing](#)

Run referral promotions that belong to your company's various brands, geographies, or business lines under one referral program. Use the Process Referral Event action in your company's business process flows to manage activities such as advocates referring their friends, friends signing up, and friends completing their first purchase.

### [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](#)

Create and manage mentoring programs, customize and expand the application experience, and modify existing learning courses and learning programs by using the Learning Wizard. Use the new Education Portal template to create a single portal that supports a variety of roles. Add the new Action Center component to your portal to help learners create and manage action plans, as well as other assigned tasks.

### [Salesforce for Nonprofits](#)

Salesforce for Nonprofits includes managed package and platform solutions for nonprofits. Nonprofit Cloud, built on the Salesforce platform, enhancements for fundraising make it easier to measure ROI for donor upgrade campaigns, improve digital fundraising and tracking, and streamline donor support requests. Nonprofit Cloud enhancements for programs and Grantmaking include Experience Cloud improvements, indication of which care plan goals you expect to drive outcomes, and the auto-calculation of results for outcomes. Updates to the Nonprofit Success Pack managed package improve identifying and correcting potential duplicates.

### [Vlocity Contract Lifecycle Management](#)

Vlocity Contract Lifecycle Management (CLM) empowers businesses to generate and maintain accurate contracts associated with opportunities, orders, and quotes. Vlocity CLM seamlessly integrates with Salesforce Lightning Experience. In the Lightning Experience, Lightning actions such as Create Contract, Update Contract, and Pick Frame Contract are available on opportunities, orders, and quotes.

### [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 filtering and performance for the data processing engine, improved monitoring for branch management, added decision tables to flows, provided templates for rebate management, added invocable actions and Apex classes for loyalty management, and much more.

## Automotive Cloud

Engage with your captive finance customers and offer comprehensive service related to automotive loans and leases. Use the Finance Console for Automotive app to delight and engage your customers, track their financial activities, and upsell financial products. Extend fleet management and captive finance capabilities to partners and customers. Automatically map fields between lead and opportunity child records when you convert a lead into an opportunity. Use the new and updated fields on Vehicle and Vehicle Definition to easily define car attributes.

### [Service Excellence for Automotive Finance](#)

Streamline your captive finance business processes with visibility into your customers' automotive loans and leases, balances, transactions, related assets, and titles. Use the Account and Financial Account consoles to engage customers with timely and personalized information about lease renewals, payment reminders, or other financial milestones. Predefined actionable relationship center graphs and timelines, record alerts, interest tags, and ready-to-launch actions help service agents resolve customer queries and upsell financial products.

### [Fleet Management Enhancements](#)

Monitor fleets more effectively in Automotive Cloud. External users can now track fleets, fleet assets, and fleet participants. Create an Experience Cloud site to help your partners and customers track fleet operations. You can now enable Fleet Management from the application in Setup. Previously, you could only enable it using Metadata API.

### [Automatically Populate Key Fields for Opportunity Products and Preferred Sellers](#)

You no longer need to manually map fields between the lead line and opportunity line items, and between lead preferred seller and opportunity preferred seller records. The name, price, product, and quantity fields are now automatically mapped between lead line item and opportunity line item. The name, account, contact, and account role fields are automatically mapped between lead preferred seller and opportunity preferred seller records.

### [Replace Deprecated Fields on Vehicle and Vehicle Definition with New Fields](#)

We're deprecating a few picklist fields and adding new picklist fields on Vehicle and Vehicle Definition records. You can now define your own picklist values for the new fields, unlike the now-deprecated fields where you could only use a set of predefined values.

### [New and Updated Objects and Fields in Automotive Cloud](#)

Do more with new and updated Financial Services Cloud objects.

### [Connect REST APIs](#)

Connect REST APIs for Automotive Cloud empower ISVs to integrate with Salesforce and telematics service providers with ease, that allows users to create and execute actionable experiences.

## New and Enhanced Common Features for Industries

Automotive Cloud includes access to some features that are available across clouds and products in Industries. Use these features to extend and customize Automotive Cloud as per your business needs.

- [Action Launcher](#)

Customer service representatives can quickly resolve customer requests by launching button- and link-based actions and the service processes associated with service catalogs. Admins can now customize the title shown on the Action Launcher component. If out-of-the-box deployments are available, admins can use them right away to configure Action Launcher.

- [Actionable Segmentation](#)

Use predefined Data Processing Engine definitions to create actionable list definitions easily and quickly. To help list creators easily filter dataset records to add to their actionable lists, set the filter input format for the applicable dataset columns as Multi-Select Picklist. List creators can now use filter templates to save the time and effort required to filter dataset records.

- [Batch Management](#)

Select records from big objects to run batch jobs in Batch Management.

- [Business Rules Engine](#)

Build business processes with scalable, extensible rules by using Business Rules Engine. Call the ready-to-use executable expression set templates from flows. Create precise rules with the operators and functions that consider null values. Use the enhancements in decision tables to simplify and streamline lookups. Show your users more targeted and nuanced explanations for expression set version step results with the enhancements in Decision Explorer.

- [Context Service](#)

Simplify the retrieval and usage of data in your business processes by using Context Service. Extend the standard context definitions that are shipped with Automotive Cloud to create custom definitions that suit your business requirements. To upgrade the standard definition components that are used in the extended custom definitions, effortlessly sync the custom definitions.

- [Data Processing Engine](#)

Streamline your forecast calculations by using Data Processing Engine. Enjoy more Data Cloud flexibility in your definitions with more object types to choose from in data source and writeback nodes. Choose Data Cloud Data Spaces for your definition. Troubleshoot quickly by restoring previous field selections in your data source when you encounter an issue with a reference node. Upload CSV file data and write it back to an object in Salesforce.

- [Intelligent Document Reader](#)

Automatically extract data from documents to create, update, or verify records by using Intelligent Document Reader.

- [List Builder for Data Cloud Segment](#)

List creators must select a data space before selecting a data segment. The actionable list preview shows the default columns of the associated object. An email notification is sent to the list creator when an actionable list reaches 50,000 member records.

- [Criteria-Based Search and Filter](#)

Help users run more targeted searches by configuring additional filter fields and filtering by field values. Enrich search results by displaying them in a user-friendly card format.

- [Timeline](#)

Get an interactive, chronological view of customer and vehicle activities by using Timeline. Configure Timeline to show engagement events from a specific data space in Data Cloud.

- [CSV Data Management for Industries](#)

Get ready-to-use data in your apps faster using the new CSV Data Management tool. With just a few clicks you can easily import large amounts of vehicle and customer data in to Salesforce objects, reducing manual data entry and the risk of errors. Prepare and upload your CSV file, map columns to Salesforce objects, validate your data to ensure frictionless import, and download import log files.

## Spring '24 Highlights for Admins

Check out this video for a preview of the key Spring '24 enhancements in Automotive Cloud.

 [Watch a video](#)

## Service Excellence for Automotive Finance

Streamline your captive finance business processes with visibility into your customers' automotive loans and leases, balances, transactions, related assets, and titles. Use the Account and Financial Account consoles to engage customers with timely and personalized information about lease renewals, payment reminders, or other financial milestones. Predefined actionable relationship center graphs and timelines, record alerts, interest tags, and ready-to-launch actions help service agents resolve customer queries and upsell financial products.

### [Monitor Automotive Loans and Leases](#)

The Financial Account page in the Finance Console for Automotive app is a one-stop shop for customer service representatives and captive finance sales managers to know everything about automotive loans or leases. View billing statements, addresses, fees, and additional charges. Quickly search for transactions based on the date or amount. View all the vehicles and parts financed by the loan or lease, along with the related titles. Milestones and record alerts help you monitor critical activities and updates, such as delinquency, title transfers, and overdue payments. You can also track changes to the balance and transactions on a timeline.

### [Help Your Captive Finance Customers with Loan and Lease Service Requests](#)

The Account record page in the Finance Console for Automotive app gets a makeover. Track the automotive loans and leases for each account, and search for transactions based on date and amount. View all cases, opportunities, contracts, and business milestones or life events related to a business or a person account. Track past and upcoming engagement interactions on a timeline, and launch quick actions for frequent service processes, such as an address change or fee reversal. View record alerts at the account level and for each loan or lease account. Add components, such as interest tags, actionable relationship center graphs, and knowledge search, to help customer service agents deliver prompt and engaging service.

### [Visualize Relationships of Your Captive Finance Customers](#)

Add an actionable relationship center (ARC) graph to an account page to show how the customer is related to other members of their household and to other related accounts. You can see all the automotive loans and leases taken by the customer and the related accounts. When you add an ARC graph to a financial account page, you can visualize the customer's beneficiaries, nominees, and co-signers and the related vehicles and assets.

### [Share Captive Finance Information with Customers and Dealers](#)

Help customers and dealers find information related to loans, leases, vehicle titles, financial transactions, and balances. Create an Experience Cloud site to share captive finance information. Customers can view their loans and leases, raise cases, and upload documents. Dealers can track the vehicles and stakeholders related to each customer, assist them with their financing queries, and update their financial information.

### [Easily Customize the Automotive Lease and Loan Consoles Using OmniStudio](#)

Extend the predefined FlexCards, DataRaptors, and Integration Procedures that are used to display the lease and loan details, the financial transactions, and the vehicle and asset title details. Customize FlexCards to display additional fields, change the display criteria, and more to meet your company's needs.

### [Improve Security of Your Financial Account Data with Shield Platform Encryption](#)

Use Shield Platform Encryption to add another layer of protection for your financial accounts. Encrypt the Name and Financial Account Number fields on the Financial Account object. The fields allow probabilistic, case-insensitive deterministic, and case-insensitive deterministic encryption schemes.

## Monitor Automotive Loans and Leases

The Financial Account page in the Finance Console for Automotive app is a one-stop shop for customer service representatives and captive finance sales managers to know everything about automotive loans or leases. View billing statements, addresses, fees, and additional charges. Quickly search for transactions based on the date or amount. View all the vehicles and parts financed by the loan or lease, along with the related titles. Milestones and record alerts help you monitor critical activities and updates, such as delinquency, title transfers, and overdue payments. You can also track changes to the balance and transactions on a timeline.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Automotive and Vehicle and Asset Finance are enabled.

**Who:** Users must have the Automotive Foundation and the Vehicle and Asset Finance Foundation permission sets assigned to them.

**How:** From the App Launcher, find and select **Finance Console for Automotive**. Select **Financial Accounts**.

SEE ALSO:

[Salesforce Help: Explore the Financial Account Page in the Finance Console for Automotive App \(can be outdated or unavailable during release preview\)](#)

## Help Your Captive Finance Customers with Loan and Lease Service Requests

The Account record page in the Finance Console for Automotive app gets a makeover. Track the automotive loans and leases for each account, and search for transactions based on date and amount. View all cases, opportunities, contracts, and business milestones or life events related to a business or a person account. Track past and upcoming engagement interactions on a timeline, and launch quick actions for frequent service processes, such as an address change or fee reversal. View record alerts at the account level and for each loan or lease account. Add components, such as interest tags, actionable relationship center graphs, and knowledge search, to help customer service agents deliver prompt and engaging service.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Automotive and Vehicle and Asset Finance are enabled.

**Who:** Users must have the Automotive Foundation and the Vehicle and Asset Finance Foundation permission sets assigned to them.

**How:** From the App Launcher, find and select **Finance Console for Automotive**, and open the Accounts tab.

### SEE ALSO:

[Salesforce Help: Explore the Account Page in the Finance Console for Automotive App \(can be outdated or unavailable during release preview\)](#)

## Visualize Relationships of Your Captive Finance Customers

Add an actionable relationship center (ARC) graph to an account page to show how the customer is related to other members of their household and to other related accounts. You can see all the automotive loans and leases taken by the customer and the related accounts. When you add an ARC graph to a financial account page, you can visualize the customer's beneficiaries, nominees, and co-signers and the related vehicles and assets.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Automotive and Vehicle and Asset Finance are enabled.

**Who:** Users must have the Automotive Foundation, Vehicle and Asset Finance Foundation, and ARC Access permission sets assigned to them.

**How:** Create an ARC graph using either the Customer Financial Relationships or Financial Account Relationships template. Add the graph to an Account page or a Financial Account page in the Lightning App Builder.

### SEE ALSO:

[Salesforce Help: Create Relationship Graphs to Visualize Captive Finance Information \(can be outdated or unavailable during release preview\)](#)

## Share Captive Finance Information with Customers and Dealers

Help customers and dealers find information related to loans, leases, vehicle titles, financial transactions, and balances. Create an Experience Cloud site to share captive finance information. Customers can view their loans and leases, raise cases, and upload documents. Dealers can track the vehicles and stakeholders related to each customer, assist them with their financing queries, and update their financial information.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Automotive and Vehicle and Asset Finance are enabled.

**Who:** Users must have the Automotive Foundation for Experience Cloud and the Vehicle and Asset Finance Foundation for Experience Cloud permission sets assigned to them.

## Easily Customize the Automotive Lease and Loan Consoles Using OmniStudio

Extend the predefined FlexCards, DataRaptors, and Integration Procedures that are used to display the lease and loan details, the financial transactions, and the vehicle and asset title details. Customize FlexCards to display additional fields, change the display criteria, and more to meet your company's needs.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Automotive Cloud, Vehicle and Asset Finance, 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.

SEE ALSO:

[Salesforce Help: Explore the OmniStudio Components for Automotive Finance \(can be outdated or unavailable during release preview\)](#)

## Improve Security of Your Financial Account Data with Shield Platform Encryption

Use Shield Platform Encryption to add another layer of protection for your financial accounts. Encrypt the Name and Financial Account Number fields on the Financial Account object. The fields allow probabilistic, case-insensitive deterministic, and case-insensitive deterministic encryption schemes.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Vehicle and Asset Finance and Shield Platform Encryption are enabled.

SEE ALSO:

[Salesforce Help: Encrypt Financial Account Name and Number in Automotive Cloud \(can be outdated or unavailable during release preview\)](#)

## Fleet Management Enhancements

Monitor fleets more effectively in Automotive Cloud. External users can now track fleets, fleet assets, and fleet participants. Create an Experience Cloud site to help your partners and customers track fleet operations. You can now enable Fleet Management from the application in Setup. Previously, you could only enable it using Metadata API.

**Where:** These changes apply to Lightning Experience in Enterprise, Unlimited, and Developer editions where Automotive Cloud and Fleet Management are enabled.

## Automatically Populate Key Fields for Opportunity Products and Preferred Sellers

You no longer need to manually map fields between the lead line and opportunity line items, and between lead preferred seller and opportunity preferred seller records. The name, price, product, and quantity fields are now automatically mapped between lead line item and opportunity line item. The name, account, contact, and account role fields are automatically mapped between lead preferred seller and opportunity preferred seller records.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Partner Lead Management and Partner Lead Management Default Mappings are enabled.

**Who:** Users must have the Partner Lead Management permission set assigned to them.

## Replace Deprecated Fields on Vehicle and Vehicle Definition with New Fields

We're deprecating a few picklist fields and adding new picklist fields on Vehicle and Vehicle Definition records. You can now define your own picklist values for the new fields, unlike the now-deprecated fields where you could only use a set of predefined values.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Automotive Cloud is enabled.

**Who:** Users must have the Automotive Foundation permission set assigned to them.

**How:** Update your business processes with the new picklist fields on Vehicle Definition and Vehicle records before we retire the deprecated fields in the Winter '24 release.

- The Door Style Type, Drivetrain Type, Fuel Type, and Transmission Type picklist fields on Vehicle Definition will be deprecated. Use the new Door Style, Drivetrain System, Fuel Source, and Transmission System picklist fields to store similar information.
- The Odometer Status picklist field on Vehicle will be deprecated. Use the new Odometer State picklist field to store similar information.

## New and Updated Objects and Fields in Automotive Cloud

Do more with new and updated Financial Services Cloud objects.

### New Objects

#### Store information about different financing and investment options, such as vehicle loans or leases

Use the new `Financial Account` object.

#### Store information about the role assumed by a person or organization involved with a financial account, such as a beneficiary or a trustee

Use the new `Financial Account Party` object.

#### Store information about the relationship between an account or contact, and an asset that's covered under a lease or loan

Use the new `Party Financial Asset` object.

#### Represents a junction between a financial account and a customer's assets.

Use the new `Financial Account Party Financial Asset` object.

#### Store information about the relationship between additional parties and an asset that's covered under a lease or loan

Use the new `Party Financial Asset Additional Owner` object.

#### Store information about the total balance, principal balance, or the available credit for a loan or lease

Use the new `Financial Account Balance` object.

#### Store information about each debit or credit transaction related to a loan or a lease

Use the new `Financial Account Transaction` object.

#### Store information about each address related to a loan or lease, such as a communication address, a billing address, or a statement address

Use the new `Financial Account Address` object.

#### Store information about each periodic or account closure statement related to a loan or a lease

Use the new `Financial Account Statement` object.

#### Store information about different types of fees levied on a loan or lease account, such as processing fees, late payment fees, or wear and tear fees

Use the new `Financial Account Fee` object.

#### Store information about key events or moments in a loan or lease account's lifecycle, such as vehicle title transfer, deferred payments, or delinquency

Use the new `Financial Account Milestone` object.

**Store information about the legal ownership of a vehicle or an asset**

Use the new `Asset Title Party` object.

**Store information about the relationship between an account, a contact, or a user and a vehicle or asset title**

Use the new `Asset Title Party` object.

## Updated Objects

**Track product and vehicle definition attributes for a Vehicle record**

Use the new fields `MakeName`, `ModelName`, `ModelYear`, `TrimLevel`, `Classification`, `FuelSource`, `DrivetrainSystem`, and `EngineName`.

**Store the location of a fleet**

Use the new field `Location`.

## Connect REST APIs

Connect REST APIs for Automotive Cloud empower ISVs to integrate with Salesforce and telematics service providers with ease, that allows users to create and execute actionable experiences.

[New Connect REST API Resources](#)

These resources reflect changes to the Automotive Cloud's APIs.

SEE ALSO:

[Salesforce Help: Learn About Automotive Cloud \(can be outdated or unavailable during release preview\)](#)

## New Connect REST API Resources

These resources reflect changes to the Automotive Cloud's APIs.

**Orchestrate the processing of inbound events between Salesforce and external sources**

Make a POST request to the new `/connect/orchestration/inbound-events` resource.

New request body: Inbound Event Input

New response body: Inbound Event

SEE ALSO:

[Automotive Cloud Developer Guide: Automotive Cloud Business APIs \(can be outdated or unavailable during release preview\)](#)

## Communications Cloud

Communications Cloud extends Salesforce Customer 360 to provide a solution specifically for the communications industry. It helps businesses digitally transform to deliver new, industry-standard customer experiences while increasing operational efficiencies. Explore an industry-specific application suite and a range of cloud solutions including Digital Commerce, Industries Order Management, Contract Lifecycle Manage, Order Capture, Configure, Price, Quote (Industries CPQ), and Enterprise Product Catalog (EPC).

Learn about what's in this release in the [Communications Cloud Release Notes](#)



## Consumer Goods Cloud

Provide closed loop promotion planning and execution framework by integrating Trade Promotion Management promotions with Retail Execution. Define business years with more flexibility and customize the way time is aggregated within your business.

### [Retail Execution](#)

Seamlessly integrate and run your Trade Promotion Management promotions as sellable promotions in Retail Execution. Get started quickly with Consumer Goods Cloud offline mobile app by logging in directly to the default connected org with your user credentials.

### [Use the Enhanced Visual Studio Code Based Modeler CLI Commands](#)

Clone contracts from the Windows Server based Modeler workspace into the VS Code based Modeler workspace for a one-time transformation. Also, add user interface and process flows in a few quick steps.

### [Trade Promotion Management](#)

Define business years with more flexibility and customize the way time is aggregated within your business. Enhance the appearance of your Trade Calendar, P&L, and Promotions. Retain Consumer Goods Processing Services data when cloning or refreshing a sandbox. Easily export data from your profit and loss view or customer business plan.

### [Automate the Transfer of TPM Promotions to Retail Promotions](#)

With Trade Promotion Management (TPM) & Retail Execution (RE) promotion integration, plan your promotions in TPM, transfer, and run through Retail Execution. Choose the promotion and tactic types that you want to transfer. Any changes in the source TPM promotions reflect in the target promotions in RE. Adjust the out-of-the-box promotion transfer logic by using the customizable hooks.

### [Get Sales Baseline Prediction Data with MuleSoft Direct](#)

Use MuleSoft Direct's pre-built assets to integrate predictive baseline data from CRM Analytics into Hyperforce for trade promotion optimization. Get sales baseline predictions to gain insights into how specific promotion plans and KPIs impact sales by comparing them to your initial baseline sales forecast.

### [Integrate Additional Business Components from ERP Systems with MuleSoft Accelerator](#)

MuleSoft Accelerator for Consumer Goods integrates list price and COGS data from the ERP system into Consumer Goods Cloud and POS order data into Data Cloud. It supports added core business components for Retail Execution, which include Customer Role, Customer Relationship, Customer Org Unit, Org Unit, and Customer Manager for Account objects.

## Retail Execution

Seamlessly integrate and run your Trade Promotion Management promotions as sellable promotions in Retail Execution. Get started quickly with Consumer Goods Cloud offline mobile app by logging in directly to the default connected org with your user credentials.

### [Extend UI and Business Logic for Advanced Orders](#)

Use Advanced Order LWC extensibility to customize online orders or to add a customization layer to support project extensions without updating the code. Fulfill specific business requirements for one or multiple markets by using UI and Business Layer (BL) extensibility. Add, remove, or reorder fields on the order pages (Order Header, Order Details, Order Items, Add Items, and Free Items). Extend the business logic to show custom fields, edit attribute values, or add new components with custom logic in advanced orders.

### [Get Started Quickly with Consumer Goods Cloud Offline Mobile App](#)

Save time by logging in directly to the default connected org with your user credentials. This feature eliminates the need to set up individual connected apps, to scan a QR code to connect to those apps, and to manually enter connected app identification data. App login with user credentials also ensures consistency with other Salesforce mobile apps.

### [Accessibility of Operating Hours for All Users](#)

The default access level (OWD) of operating hours for all existing customers is changed to Private. After the upgrade, the release task changes the access level from Private to Public Read/Write. The change in the setting takes 24–48 hrs to be reflected. For all new users, the access level is set as Private, by default. Update the access level manually or by using the sharing rules.

### [Optimize Store Performance in Promotions by Using Analytics Insights](#)

Evaluate the engagement of retail stores in promotions by using the Store Participation and Compliance Analysis dashboard. Use the Competitor Analytics dashboard to gain data-driven insights into competitor brand and product presence and into their impact during the promotional period.

### [Provide Enhanced Accessibility](#)

Improve the user experience in Retail Execution. You can now create activities through the Lighting Web Component (LWC).

### [New and Changed Objects in Retail Execution](#)

Do more with the new and updated objects in Retail Execution.

## Extend UI and Business Logic for Advanced Orders

Use Advanced Order LWC extensibility to customize online orders or to add a customization layer to support project extensions without updating the code. Fulfill specific business requirements for one or multiple markets by using UI and Business Layer (BL) extensibility. Add, remove, or reorder fields on the order pages (Order Header, Order Details, Order Items, Add Items, and Free Items). Extend the business logic to show custom fields, edit attribute values, or add new components with custom logic in advanced orders.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions where Consumer Goods Cloud is enabled.

SEE ALSO:

[Consumer Goods Cloud Developer Guide](#)

## Get Started Quickly with Consumer Goods Cloud Offline Mobile App

Save time by logging in directly to the default connected org with your user credentials. This feature eliminates the need to set up individual connected apps, to scan a QR code to connect to those apps, and to manually enter connected app identification data. App login with user credentials also ensures consistency with other Salesforce mobile apps.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions where Consumer Goods Cloud is enabled.

**Who:** This change applies to the CG Cloud offline mobile app for Android and iOS.

**How:** The CG Cloud offline mobile app is now integrated with a default CG Cloud connected app. If you're a new user, download the CG Cloud offline mobile app, log in with your credentials, and you're good to go. Existing users of the CG Cloud offline mobile app can use the default connected app when their apps are automatically upgraded to the Spring'24 version. If your company requires you to use your company-specific connected app or to continue to use the custom connected app from Winter'24 or earlier, ask your admin for the QR code to the custom connected app to launch the mobile app. To use the mobile app, restart the app, and then scan the QR code and authenticate with your user credentials.

SEE ALSO:

[Set Up the Consumer Goods Cloud Offline Mobile App](#)

[Create a Connected App](#)

## Accessibility of Operating Hours for All Users

The default access level (OWD) of operating hours for all existing customers is changed to Private. After the upgrade, the release task changes the access level from Private to Public Read/Write. The change in the setting takes 24–48 hrs to be reflected. For all new users, the access level is set as Private, by default. Update the access level manually or by using the sharing rules.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions where Consumer Goods Cloud is enabled.

SEE ALSO:

[Sharing Rules](#)

## Optimize Store Performance in Promotions by Using Analytics Insights

Evaluate the engagement of retail stores in promotions by using the Store Participation and Compliance Analysis dashboard. Use the Competitor Analytics dashboard to gain data-driven insights into competitor brand and product presence and into their impact during the promotional period.

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

**Who:** These dashboards are part of the Analytics for Consumer Goods - Advanced Data Model app. To create the app, you need the Revenue Intelligence for Consumer Goods Admin permission set. To use the app, you need the Revenue Intelligence for Consumer Goods User permission set.

**How:** From CRM Analytics Studio, click **Create**, and then select **App**. Find and select the **Analytics for Consumer Goods - Advanced Data Model** app template and follow the instructions in the setup flow to create your app.

## Provide Enhanced Accessibility

Improve the user experience in Retail Execution. You can now create activities through the Lightning Web Component (LWC).

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions where Consumer Goods Cloud is enabled.

**How:** To create activities through the LWC, click the **New Activity** button on the Activities page.

## New and Changed Objects in Retail Execution

Do more with the new and updated objects in Retail Execution.

### Transfer Trade Promotion Management Promotions to Retail Execution

Use the transfer relevant fields added to the `cgcloud__Promotion__c`, `cgcloud__Tactic__c`, `cgcloud__Tactic_Product__c`, `cgcloud__Promotion_Template__c`, `Product2`, `cgcloud__Account_Extension__c`, and `cgcloud__Tactic_Template__c` objects.

- `Product2`
  - `cgcloud__Transfer_Record_Identifier__c`
- `cgcloud__Account_Extension__c`
  - `cgcloud__Transfer_Record_Identifier__c`
  - `cgcloud__Transfer_Record_Identifier_Unique__c`
- `cgcloud__Promotion_Template__c`
  - `cgcloud__Transfer_Relevant_Phases__c`
  - `cgcloud__Transfer_Sales_Org__c`

- cgcloud\_\_Ignore\_time\_on\_delete\_\_c
- cgcloud\_\_Transfer\_Lead\_Time\_\_c
- cgcloud\_\_Transfer\_Follow\_Up\_Time\_\_c
- cgcloud\_\_Target\_Promotion\_Template\_\_c
- cgcloud\_\_Is\_Transfer\_Relevant\_\_c
- cgcloud\_\_Promotion\_\_c
  - cgcloud\_\_Source\_Promotion\_\_c
  - cgcloud\_\_Is\_Transferable\_\_c
  - cgcloud\_\_Transferred\_Version\_\_c
- cgcloud\_\_Tactic\_\_c
  - cgcloud\_\_Source\_Tactic\_\_c
- cgcloud\_\_Tactic\_Template\_\_c
  - cgcloud\_\_Target\_Tactic\_Template\_\_c
- cgcloud\_\_Tactic\_Product\_\_c
  - cgcloud\_\_Is\_Transferred\_\_c
- cgcloud\_\_Promotion\_Template\_Tactic\_Template\_\_c
  - cgcloud\_\_Is\_Transfer\_Relevant\_\_c
- cgcloud\_\_Sales\_Organization\_\_c
  - cgcloud\_\_Sales\_Org\_Admin\_User\_\_c

### Add Tour and Route Configurations

Make use of these tour and route custom objects in Retail Execution to support the Direct Store Delivery and Van Sales feature.

- cgcloud\_\_Route\_\_c
- cgcloud\_\_Route\_Account\_\_c
- cgcloud\_\_Route\_Template\_\_c
- cgcloud\_\_Tour\_\_c
- cgcloud\_\_Tour\_Check\_\_c
- cgcloud\_\_Tour\_Object\_Reference\_\_c
- cgcloud\_\_Tour\_Template\_\_c
- cgcloud\_\_Tour\_Template\_Object\_Reference\_\_c
- cgcloud\_\_Tour\_Template\_Tour\_Check\_\_c
- cgcloud\_\_Tour\_Tour\_Check\_\_c
- cgcloud\_\_Vehicle\_\_c
- cgcloud\_\_Vehicle\_Warehouse\_\_c

### Configure Additional Tour Configurations

Use these fields added to the cgcloud\_\_Tour\_Template\_\_c object:

- cgcloud\_\_Should\_Allow\_End\_Day\_Geofencing\_\_c
- cgcloud\_\_Should\_Allow\_End\_Day\_GPS\_Tracking\_\_c

- `cgcloud__Should_Allow_End_Day_Time_Tracking__c`
- `cgcloud__Should_Allow_Seal_Scanning__c`
- `cgcloud__Should_Allow_Start_Day_Geofencing__c`
- `cgcloud__Should_Allow_Start_Day_GPS_Tracking__c`
- `cgcloud__Should_Allow_Start_Day_Time_Tracking__c`
- `cgcloud__Creation_Platform__c`
- `cgcloud__Default_Tour_Visit_Duration__c`
- `cgcloud__Is_Odometer_Photo_Required__c`

### Support DSD and Van Sales Tours

- Use the `cgcloud__Geofence_Distance__c` field added to the `cgcloud__Sales_Organization__c` object.
- Use the `cgcloud__Product_Check_In_Policy__c` and the `cgcloud__Check_Out_Type__c` fields added to the `cgcloud__Order_Template__c` object.

## Use the Enhanced Visual Studio Code Based Modeler CLI Commands

Clone contracts from the Windows Server based Modeler workspace into the VS Code based Modeler workspace for a one-time transformation. Also, add user interface and process flows in a few quick steps.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions where Consumer Goods Cloud is enabled.

**Why:** With the simplified Modeler, clone contracts from Modeler Content Package (MCP.zip) directly to your Modeler workspace by using this `importContracts` CLI command. The import process transforms all business logic XML files to JavaScript (bl.js) files: `sf modeler workspace utils importContracts -i <contract.zip_filepath> [-json] [-p <Modeler_workspace_path>] [-c]`.

You're no longer required to manually clone the contracts to add a user interface or process flow during customization. The `sf modeler workspace add` CLI command now includes the user interface and process type of contracts. Use the instructions provided in this command to add a user interface or process flow to new or existing modules in your Modeler workspace.

SEE ALSO:

[Import Contracts to a Modeler Workspace](#)

[Creation of Custom Modules and Contracts](#)

## Trade Promotion Management

Define business years with more flexibility and customize the way time is aggregated within your business. Enhance the appearance of your Trade Calendar, P&L, and Promotions. Retain Consumer Goods Processing Services data when cloning or refreshing a sandbox. Easily export data from your profit and loss view or customer business plan.

### [Get More Control Over Business Years and Time Periods](#)

Define business years more flexibly by specifying any number of days from 360 through 380 or by specifying a custom day to begin the business year with. Customize how time is aggregated within your business. For example, define months with varying lengths, consisting of 4 or 5 weeks. Define personalized labels for custom time periods. View and edit the KPI values associated with your custom periods, months, or quarters in the customer business plan, profit and loss view, and promotion. View custom time period values with their corresponding labels in a real-time report.

### [Retain Consumer Goods Processing Services Data When You Clone or Refresh a Sandbox](#)

Eliminate the need to reload all relevant integration data into Consumer Goods Processing Services and rerun all calculation processes. Clone an available processing services database from within the same production org or any of its existing sandboxes without causing any downtime in the source org.

### [Customize the Trade Calendar, P&L, and Promotions](#)

Bring a more streamlined and familiar look to your Trade Calendar, P&L, and Promotions. Use key performance indicators (KPIs) on a Trade Promotion launchpad, and align them with specific promotional templates. Provide a precise level of access with fine-grained control over edit and access rights. Load data through an API without the need for a manual save and refresh to ensure real-time incorporation of custom component information into the promotion.

### [Share Data From Your Account Plan and Customer Business Plan with Stakeholders](#)

You can now download data from the current view of an account plan P&L and customer business plan to a CSV file. Share valuable insights into the business metrics spanning various levels within your product hierarchy.

### [Adjust KPIs in Your Customer Business Plan More Intuitively](#)

Even if editing past periods is restricted in your customer business plan, you can still edit the current week or custom period. You can also input a total value for a new business year.

### [Simplify User Access Checks to TPO Prediction Models](#)

Streamline the user access to TPO prediction models by using the data from the Product Manager object.

### [Improved Trade Promotion Management Documentation](#)

We updated the Set Up Trade Promotion Management document and deprecated the Trade Promotion Management At Your Fingertips document in Salesforce Help. With these changes, all feature documentation is available in one place, making it easy to find the information you need.

### [Consumer Goods Cloud Videos](#)

New videos help you learn about the capabilities of Consumer Goods Cloud.

## Get More Control Over Business Years and Time Periods

Define business years more flexibly by specifying any number of days from 360 through 380 or by specifying a custom day to begin the business year with. Customize how time is aggregated within your business. For example, define months with varying lengths, consisting of 4 or 5 weeks. Define personalized labels for custom time periods. View and edit the KPI values associated with your custom periods, months, or quarters in the customer business plan, profit and loss view, and promotion. View custom time period values with their corresponding labels in a real-time report.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions where Consumer Goods Cloud Trade Promotion Management is enabled.

#### SEE ALSO:

[Create a Sales Organization](#)

[Create a Business Year](#)

[Create a Custom Calendar](#)

## Retain Consumer Goods Processing Services Data When You Clone or Refresh a Sandbox

Eliminate the need to reload all relevant integration data into Consumer Goods Processing Services and rerun all calculation processes. Clone an available processing services database from within the same production org or any of its existing sandboxes without causing any downtime in the source org.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions where Consumer Goods Cloud Trade Promotion Management is enabled.

SEE ALSO:

[Data Source Clone](#)

## Customize the Trade Calendar, P&L, and Promotions

Bring a more streamlined and familiar look to your Trade Calendar, P&L, and Promotions. Use key performance indicators (KPIs) on a Trade Promotion launchpad, and align them with specific promotional templates. Provide a precise level of access with fine-grained control over edit and access rights. Load data through an API without the need for a manual save and refresh to ensure real-time incorporation of custom component information into the promotion.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions where Consumer Goods Cloud Trade Promotion Management is enabled.

## Share Data From Your Account Plan and Customer Business Plan with Stakeholders

You can now download data from the current view of an account plan P&L and customer business plan to a CSV file. Share valuable insights into the business metrics spanning various levels within your product hierarchy.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions where Consumer Goods Cloud Trade Promotion Management is enabled.

SEE ALSO:

[Enable Downloads](#)

[Download a Scenario](#)

[Download an Account Plan P&L](#)

## Adjust KPIs in Your Customer Business Plan More Intuitively

Even if editing past periods is restricted in your customer business plan, you can still edit the current week or custom period. You can also input a total value for a new business year.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions where Consumer Goods Cloud Trade Promotion Management is enabled.

## Simplify User Access Checks to TPO Prediction Models

Streamline the user access to TPO prediction models by using the data from the Product Manager object.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions where Consumer Goods Cloud Trade Promotion Management is enabled.

**Who:** The Forecast Baseline Sales Volume (Trade Promotion Optimization) and Predict Sales Uplift Volume templates are available to Trade Promotion Management users with the Trade Promotion Optimization licenses.

**How:** To get predictions, go to the Scoring Framework page in Setup. Create a CRM Analytics template configuration by using the Forecast Baseline Sales Volume (Trade Promotion Optimization) and Predict Sales Uplift Volume templates.

SEE ALSO:

[Uplift Prediction](#)


## Improved Trade Promotion Management Documentation

We updated the Set Up Trade Promotion Management document and deprecated the Trade Promotion Management At Your Fingertips document in Salesforce Help. With these changes, all feature documentation is available in one place, making it easy to find the information you need.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions where Consumer Goods Cloud Trade Promotion Management is enabled.

## Consumer Goods Cloud Videos

New videos help you learn about the capabilities of Consumer Goods Cloud.

 [Adjust the Promotion Page with an LWC Component](#): Watch this video series to create a Lightning Web Component that interacts with Promotion and related data.

## Automate the Transfer of TPM Promotions to Retail Promotions

With Trade Promotion Management (TPM) & Retail Execution (RE) promotion integration, plan your promotions in TPM, transfer, and run through Retail Execution. Choose the promotion and tactic types that you want to transfer. Any changes in the source TPM promotions reflect in the target promotions in RE. Adjust the out-of-the-box promotion transfer logic by using the customizable hooks.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions where Consumer Goods Cloud is enabled.

**How:** When you transfer a promotion, it's automatically recreated in RE via an asynchronous process triggered through the user interface or in bulk by using a scheduled apex class.

SEE ALSO:

[Consumer Goods Cloud Developer Guide](#)

## Get Sales Baseline Prediction Data with MuleSoft Direct

Use MuleSoft Direct's pre-built assets to integrate predictive baseline data from CRM Analytics into Hyperforce for trade promotion optimization. Get sales baseline predictions to gain insights into how specific promotion plans and KPIs impact sales by comparing them to your initial baseline sales forecast.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions where Consumer Goods Cloud Trade Promotion Management is enabled.

SEE ALSO:

[MuleSoft Direct for Industry Clouds](#)



## Integrate Additional Business Components from ERP Systems with MuleSoft Accelerator

MuleSoft Accelerator for Consumer Goods integrates list price and COGS data from the ERP system into Consumer Goods Cloud and POS order data into Data Cloud. It supports added core business components for Retail Execution, which include Customer Role, Customer Relationship, Customer Org Unit, Org Unit, and Customer Manager for Account objects.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions where Consumer Goods Cloud, Trade Promotion Management are enabled.

SEE ALSO:

[Mulesoft Help: MuleSoft Accelerator for Consumer Goods 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](#)

## Financial Services Cloud

Create and execute a financial plan to reach a financial goal. Organize and unify data across Salesforce and other external data sources using Data Cloud. A new setting lets you change the way that you share mortgage records, including residential loan applications. Quickly sync events organized by users external to Salesforce and automatically create interaction participant records during an Interaction event sync. Enrich transactions with merchant-related information and define business rules to deflect transactions that don't satisfy specified criteria. Configure merchant alerts for disputed transactions, and enable your customers to raise transaction disputes in a self-service portal. Learn about these and other Financial Services Cloud features. Learn about these and other Financial Services Cloud features.

### [Financial Plans and Goals](#)

Create and execute a financial plan to reach a financial goal.

### [Data Cloud for Financial Services Cloud](#)

Organize and unify data across Salesforce and other external data sources using Data Cloud. View visualized insights in Salesforce using FlexCards.

### [Residential Loan Application](#)

A new setting lets you change the way that you share mortgage objects including residential loan applications.

### [Einstein Activity Capture for Financial Services Cloud](#)

Quickly sync the events that aren't organized by Salesforce users. Automatically create interaction participant records during an interaction event sync.

### [Transaction Dispute Management](#)

Enrich transactions with merchant-related information and define business rules to deflect transactions that don't satisfy specified criteria. Configure merchant alerts for disputed transactions to help your users monitor the dispute resolution workflow. Enable your customers to raise transaction disputes in a self-service portal.

### [Service Process Automation](#)

Learn about the new prebuilt service processes for wealth management.

### [Integrated Onboarding](#)

Quickly review the status of your integration callouts by using Integration Orchestration (pilot).

### [New and Changed Financial Services Cloud Object Fields](#)

Do more with new and updated Financial Services Cloud objects.

### [New Apex Classes](#)

Developer feature Apex classes.

### [New Connect APIs](#)

Developer features connect APIs.

### [New Invocable Actions](#)

Developer feature Invocable Actions.

### [Mulesoft Wealth Management REST APIs](#)

Developer features Mulesoft.

## New and Enhanced Common Features for Industries

Financial Services Cloud includes access to some features that are available across clouds and products in Industries. Use these features to extend and customize Financial Services Cloud based on your business needs.

- [Actionable Segmentation](#)

Create actionable list definitions faster with predefined Data Processing Engine Definitions. Help your sales executives build more flexible and extensive filters with Multi-Select Picklists. Sales or service executives can now reuse filter criteria with filter templates, and get a quick view of an actionable list member's details with the Show List Member Details component.

- [List Builder for Data Cloud Segment](#)

Sales or service executives can now access data segments securely and easily with data space. Sales or service executives can see important information at a glance in the actionable list preview, and get timely email notifications when an actionable list limit is reached.

- [KPI Bar](#)

Provide customized insights on Actionable Lists by creating custom key performance indicators (KPIs). Sales or service executives can now use custom KPIs on KPI Bar to get tailored insights on their actionable lists.

- [Bulk Action Panel](#)

Show the actionable list-specific bulk actions on Bulk Action Panel by creating bulk action configurations. Sales or service executives can quickly access the relevant bulk actions on Bulk Action panel to streamline their actionable list workflows.

## Financial Plans and Goals

Create and execute a financial plan to reach a financial goal.

### [View Financial Plan and Goals](#)

Use Financial Plans to help your clients plan for and reach their short and long-term financial objectives. On a person account or household record, the FSCFinancialPlanDetails FlexCard shows your client's financial plan and associated financial goals. Quickly review details of each goal in a plan, such as target date, target value, priority, and feasibility. If your client's priorities change, edit a goal's details such as target date or value. Give your users quick access to your external planning tool using the Launch Planning Tool button.

### [Update the Financial Account on a Goal](#)

When you create or edit a financial goal, you can now select a financial account to fund that goal using the FSCFinancialAccountDetails FlexCard. The FlexCard shows the selected financial account, a list of financial goals funded by the account, and the available account balance for goal funding.

### [View and Distribute Funds to Financial Goals](#)

Use the FinancialGoalsFundingHeader FlexCard to view and update the distribution of funds from a financial account to financial goals. The FlexCard shows each goal's name, target value, priority, and amount. The Funding Available for Goals field shows the financial account's remaining goal funding balance.

### [Identify the Financial Account Funding a Goal](#)

You can now see the financial account that's funding a goal on the FinancialAccountGoal FlexCard. Quickly identify the goals that are funded by a financial account that has a change in income. For example, a client's salary increases due to a promotion and they want to increase contribution amounts to all post-retirement goals funded by their primary checking account.

## View Financial Plan and Goals

Use Financial Plans to help your clients plan for and reach their short and long-term financial objectives. On a person account or household record, the FSCFinancialPlanDetails FlexCard shows your client's financial plan and associated financial goals. Quickly review details of each goal in a plan, such as target date, target value, priority, and feasibility. If your client's priorities change, edit a goal's details such as target date or value. Give your users quick access to your external planning tool using the Launch Planning Tool button.

**Where:** This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

**Who:** To use this feature, users need the Financial Services Cloud Extension and OmniStudio User permission sets.

**Why:** View the overall feasibility of your client's financial plan, progress of each financial goal in the plan, and goals that need updating to achieve success. For example, your client's retirement financial plan has a goal for emergency savings. The feasibility of success is 0% because it isn't funded by a financial account. Edit the goal and link it to a financial account to ensure that your client reaches their goal by retirement.

**How:** Add the FSCFinancialPlanDetails FlexCard to person account and household record pages.

SEE ALSO:

[Salesforce Help: Financial Goals](#)

## Update the Financial Account on a Goal

When you create or edit a financial goal, you can now select a financial account to fund that goal using the FSCFinancialAccountDetails FlexCard. The FlexCard shows the selected financial account, a list of financial goals funded by the account, and the available account balance for goal funding.

**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 and OmniStudio User permission sets to use this feature.

**Why:** Let your clients focus on the financial goals that are most important to them. For example, if a client decides to deprioritize their summer vacation goal, edit the goal and select **Don't associate a financial account to this financial goal**. This setting removes all financial account associations from the goal.

## View and Distribute Funds to Financial Goals

Use the FinancialGoalsFundingHeader FlexCard to view and update the distribution of funds from a financial account to financial goals. The FlexCard shows each goal's name, target value, priority, and amount. The Funding Available for Goals field shows the financial account's remaining goal funding balance.

**Where:** This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

**Who:** To use this feature, users need the Financial Services Cloud Extension and OmniStudio User permission sets.

**Why:** Quickly identify the goals that need a contribution change when a client's financial account balance changes. For example, a financial account that funds three goals has an account balance decrease due to an unexpected expense. Reduce or remove funding to the lowest priority goal that's funded by the financial account.

**How:** Add the FinancialGoalsFundingHeader FlexCard to the Financial Account record page.

## Identify the Financial Account Funding a Goal

You can now see the financial account that's funding a goal on the FinancialAccountGoal FlexCard. Quickly identify the goals that are funded by a financial account that has a change in income. For example, a client's salary increases due to a promotion and they want to increase contribution amounts to all post-retirement goals funded by their primary checking account.

**Where:** This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

**Who:** To use this feature, users need the Financial Services Cloud Extension and OmniStudio User permission sets.

**How:** If you cloned and customized the FinancialAccountGoal FlexCard to meet the needs of your team, update your FlexCard to add the Financial Account name.

## Data Cloud for Financial Services Cloud

Organize and unify data across Salesforce and other external data sources using Data Cloud. View visualized insights in Salesforce using FlexCards.

### [Calculate Customer Insights using Data Cloud](#)

Connect and integrate client data, such as interaction, behavioral, and transactional data across systems to give financial institutions a unified profile of each client using Data Cloud for Financial Services Cloud. Build intelligent insights and identify trends about your clients. Install the data kit to get access to data model object streams, mappings, transforms, and calculated insights for Financial Services Cloud Data Cloud. Ingest your client's transaction data by connecting Data Cloud to your external core banking system. Build intelligent insights and identify trends about your clients using preconfigured calculated insights such as Total Monthly Expenses or Financial Account Balance Net Worth.

### [View Visualized Insights for Client Cash Flow Summary](#)

Identify trends in your client's spending using the FSCDataCloudShowIncomeExpenses FlexCard. A bar graph shows a month-by-month breakdown of total income and expenses. When Data Cloud is connected with your Financial Services Cloud org, the FlexCard pulls data from calculated insights that look at your client's deposits and expenses over the last 3 months, 6 months, and 1 year.

### [View Visualized Insights for Client Cash Flow by Category](#)

Get a clear view of your client's financial habits over the last 30 days by reviewing their income and expenses in the FSCDataCloudCashFlowByCategory FlexCard. When Data Cloud is connected with your Financial Services Cloud org, the FlexCard pulls data from two calculated insights: Monthly Expenses by Category and Monthly Inflow Transactions by Category.

## Calculate Customer Insights using Data Cloud

Connect and integrate client data, such as interaction, behavioral, and transactional data across systems to give financial institutions a unified profile of each client using Data Cloud for Financial Services Cloud. Build intelligent insights and identify trends about your clients. Install the data kit to get access to data model object streams, mappings, transforms, and calculated insights for Financial Services Cloud Data Cloud. Ingest your client's transaction data by connecting Data Cloud to your external core banking system. Build intelligent insights and identify trends about your clients using preconfigured calculated insights such as Total Monthly Expenses or Financial Account Balance Net Worth.

**Where:** This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

**Who:** To use this feature, users need the Financial Services Cloud Extension and OmniStudio Admin or User permission set in their Salesforce org, and Data Cloud Admin permission set in their Data Cloud org.

**Why:** Analyze data in near real-time and identify trends in your client data using calculated insights. For example, use the data gathered from the Percentage of Cash Inflow Spent calculated insight to identify trends in spending, such as when a client spends 95% of their incoming cash each month. To understand, target, and analyze your client data, use segmentation to break down the data into useful segments.

**How:** Set up your Data Cloud org and then install and configure the data kit that contains the data model object streams, mappings, transforms, and calculated insights. Connect your data source, such as Salesforce or an external core banking system, to Data Cloud. Then use the power of Data Cloud to calculate customer insights and identify trends.

SEE ALSO:

[Salesforce Help: Data Cloud for Financial Services Cloud](#)

## View Visualized Insights for Client Cash Flow Summary

Identify trends in your client's spending using the FSCDataCloudShowIncomeExpenses FlexCard. A bar graph shows a month-by-month breakdown of total income and expenses. When Data Cloud is connected with your Financial Services Cloud org, the FlexCard pulls data from calculated insights that look at your client's deposits and expenses over the last 3 months, 6 months, and 1 year.

**Where:** This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

**Who:** To use this feature, users need the Financial Services Cloud Extension, Data Cloud for Financial Services Cloud Admin User or Data Cloud for Financial Services Cloud User, OmniStudio Admin or User permission set in their Salesforce org, and Data Cloud Admin permission set in their Data Cloud org.

**How:** To show an aggregate of all their financial accounts, add the FlexCard to a person account record page. Select a time frame of the last 3 months, 6 months, or 1 year to review your client's total income, total expenses, total surplus, average monthly income, average monthly expenses, and average monthly surplus in one FlexCard.

## View Visualized Insights for Client Cash Flow by Category

Get a clear view of your client's financial habits over the last 30 days by reviewing their income and expenses in the FSCDataCloudCashFlowByCategory FlexCard. When Data Cloud is connected with your Financial Services Cloud org, the FlexCard pulls data from two calculated insights: Monthly Expenses by Category and Monthly Inflow Transactions by Category.

**Where:** This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

**Who:** To use this feature, users need the Financial Services Cloud Extension, Data Cloud for Financial Services Cloud Admin User or Data Cloud for Financial Services Cloud User, OmniStudio Admin or User permission set in their Salesforce org, and Data Cloud Admin permission set in their Data Cloud org.

**How:** To view an aggregate of all of financial accounts add the FlexCard to a person account record page. Select to show a client's income or expenses for the previous calendar month. A pie chart and a list show a breakdown of your client's top five outgoing or incoming transaction categories for the previous calendar month.

## Residential Loan Application

A new setting lets you change the way that you share mortgage objects including residential loan applications.

### [Control Who Can Access Residential Loan Application Records](#)

Limit user access to Residential Loan Application records and other mortgage objects, even if they're members of an Account team, using the Override Mortgage Custom Sharing with Standard Salesforce Sharing setting. When you turn on the setting, standard Salesforce sharing rules apply. This setting overrides the Edit Residential Loan Application for Account Read-Only Users setting. Previously, access to the Residential Loan Application record was controlled by the associated account record sharing even if the organization wide default for Residential Loan Application was set to Private.

### [Residential Loan Application Sharing Setting Updated](#)

The Controlled by Parent organization-wide sharing setting is removed for Loan Application Asset, Loan Application Liability, and Residential Loan Application objects. Review the sharing settings for the objects and if Controlled by Parent is in use, select a different value.

### [Create a Sharing Set for Mortgage Objects](#)

Give mortgage Experience Cloud site users access to mortgage records using sharing sets. A sharing set grants site users access to any record associated with an account or contact that matches the user's account or contact. For example, grant site users access to all Residential Loan Application records related to an account that's identified on the user's account record.

## Control Who Can Access Residential Loan Application Records

Limit user access to Residential Loan Application records and other mortgage objects, even if they're members of an Account team, using the Override Mortgage Custom Sharing with Standard Salesforce Sharing setting. When you turn on the setting, standard Salesforce sharing rules apply. This setting overrides the Edit Residential Loan Application for Account Read-Only Users setting. Previously, access to the Residential Loan Application record was controlled by the associated account record sharing even if the organization wide default for Residential Loan Application was set to Private.

**Where:** This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

**Why:** This setting lets you control loan application visibility, limiting unnecessary users from accessing sensitive client data. For example, turn on the setting, set the organization wide default for Residential Loan Application and Account to Private, and add two users to an Account team. When one user creates a Residential Loan Application record, the second user doesn't have access to the record even though they're both members of the Account team.

**How:** From Setup, click Mortgage Settings and turn on the Override Mortgage Custom Sharing with Standard Salesforce Sharing.

SEE ALSO:

[Set Up an Manage Mortgage](#)

[Mortgage Record Creation Settings](#)

## Residential Loan Application Sharing Setting Updated

The Controlled by Parent organization-wide sharing setting is removed for Loan Application Asset, Loan Application Liability, and Residential Loan Application objects. Review the sharing settings for the objects and if Controlled by Parent is in use, select a different value.

**Where:** This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

**How:** In Setup, select **Sharing Settings**. Confirm that the Default Internal Access and Default External Access isn't set to **Controlled by Parent** for Loan Application Asset, Loan Application Liability, and Residential Loan Application objects.

## Create a Sharing Set for Mortgage Objects

Give mortgage Experience Cloud site users access to mortgage records using sharing sets. A sharing set grants site users access to any record associated with an account or contact that matches the user's account or contact. For example, grant site users access to all Residential Loan Application records related to an account that's identified on the user's account record.

**Where:** This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

**How:** From Setup, click **Digital Experiences** and create a sharing set or edit an existing one. Set up a sharing set with the mortgage objects to which you want to grant access.

SEE ALSO:

[Create a Sharing Set](#)

## Einstein Activity Capture for Financial Services Cloud

Quickly sync the events that aren't organized by Salesforce users. Automatically create interaction participant records during an interaction event sync.

### [Gain More Visibility for Your Events Organized by Users External to Salesforce](#)

Sales reps can use Einstein Activity Capture for Financial Services Cloud to sync the events that aren't organized by Salesforce users to keep the Salesforce calendars and availability up to date. The system promotes any one of the event attendees who is a Salesforce user as the owner of the interaction record and uses the newly assigned owner's connected calendar applications to sync the event details with Salesforce. Previously, only the events that were organized by Salesforce users were synced between Salesforce and connected accounts.

### [Streamline Creation of Interaction Participants](#)

Save time and effort by creating interaction participants automatically during an interaction event sync. Previously, users created interaction participant records manually. An interaction participant record is created only for those event attendees who are internal Salesforce users and have the Compliant Data Sharing permission set.

## Gain More Visibility for Your Events Organized by Users External to Salesforce

Sales reps can use Einstein Activity Capture for Financial Services Cloud to sync the events that aren't organized by Salesforce users to keep the Salesforce calendars and availability up to date. The system promotes any one of the event attendees who is a Salesforce user as the owner of the interaction record and uses the newly assigned owner's connected calendar applications to sync the event details with Salesforce. Previously, only the events that were organized by Salesforce users were synced between Salesforce and connected accounts.

**Where:** This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

**How:** From Setup, in the Quick Find box, enter **Interaction Summary**, and then select **Interaction Summary Settings**. Enable **Einstein Activity Capture for Financial Services Cloud**.

SEE ALSO:

[Salesforce Help: Considerations for Working with Einstein Activity Capture for Financial Services Cloud \(can be outdated or unavailable during release preview\)](#)

## Streamline Creation of Interaction Participants

Save time and effort by creating interaction participants automatically during an interaction event sync. Previously, users created interaction participant records manually. An interaction participant record is created only for those event attendees who are internal Salesforce users and have the Compliant Data Sharing permission set.

**Where:** This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

**How:** From Setup, in the Quick Find box, enter **Interaction Summary**, and then select **Interaction Summary Settings**. Enable **Create Interaction Participants Automatically**, and assign a default participant role.

SEE ALSO:

[Salesforce Help: Create Interaction Participants \(can be outdated or unavailable during release preview\)](#)

## Transaction Dispute Management

Enrich transactions with merchant-related information and define business rules to deflect transactions that don't satisfy specified criteria. Configure merchant alerts for disputed transactions to help your users monitor the dispute resolution workflow. Enable your customers to raise transaction disputes in a self-service portal.

### [Show More Data About Transactions in the Dispute Intake OmniScript](#)

Give your service agents a comprehensive view of transaction details. When your agents process a dispute request, they can now see transactions enriched with important merchant-related details, such as merchant name, logo, and URL. Your agents can use these details to help your customers recognize their transactions more easily. Exclude recognized transactions from additional dispute investigations to reduce operational costs and to enhance customer satisfaction.

### [Resolve Transaction Disputes with Integrated Business Rules](#)

Automate the closure of transaction disputes. Use business rules to specify date and disputed amount thresholds for transactions. If the date and disputed amount of a transaction are under their thresholds, then the transaction is cleared for automatic write-off without further investigation. If the date is above the threshold, then the disputed transaction is marked as invalid. With this approach, your dispute case owners can focus on key disputes, and you can experience faster and cost-effective dispute resolution while ensuring regulatory compliance. Also, you can customize these rules without code to suit your business needs.

### [Provide Timely Action For Disputed Transactions with Merchant Alerts](#)

Transaction Dispute Management now integrates with Ethoca Alerts™ to raise timely merchant alerts for disputed transactions. This integration helps you directly communicate with the merchants involved in disputed transactions and serves as a preventive measure against chargebacks. When merchants respond to these alerts, the alert outcomes and their statuses are stored in Salesforce. Your dispute case owners can use the alert status and outcome to efficiently track and monitor the end-to-end dispute resolution workflow.



### [Streamline Dispute-Related Communications with Prebuilt Email Prompt Templates](#)

Empower your dispute case owners to quickly pick the right email templates and draft high-quality emails. Make their workflow easier and eliminate the need to maintain numerous static email or mail-merge templates. The dispute case owners can use scenario-specific prompt templates and AI-driven drafting to effortlessly generate efficient and personalized communications to acknowledge dispute requests and to communicate their outcomes. These templates dynamically fetch the relevant data related to the dispute and include the data in the AI-driven email draft.

### [Help Your Customers Raise Transaction Disputes Easily](#)

Offer a self-guided experience for your customers to raise transaction disputes. Configure a self-service portal using the Financial Services Client Portal template and add the prebuilt dispute intake OmniScript to the Action Launcher. Your customers can initiate dispute requests without contacting your service agents.

## Show More Data About Transactions in the Dispute Intake OmniScript

Give your service agents a comprehensive view of transaction details. When your agents process a dispute request, they can now see transactions enriched with important merchant-related details, such as merchant name, logo, and URL. Your agents can use these details to help your customers recognize their transactions more easily. Exclude recognized transactions from additional dispute investigations to reduce operational costs and to enhance customer satisfaction.

**Where:** This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

SEE ALSO:

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

## Resolve Transaction Disputes with Integrated Business Rules

Automate the closure of transaction disputes. Use business rules to specify date and disputed amount thresholds for transactions. If the date and disputed amount of a transaction are under their thresholds, then the transaction is cleared for automatic write-off without further investigation. If the date is above the threshold, then the disputed transaction is marked as invalid. With this approach, your dispute case owners can focus on key disputes, and you can experience faster and cost-effective dispute resolution while ensuring regulatory compliance. Also, you can customize these rules without code to suit your business needs.

**Where:** This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

SEE ALSO:

[Salesforce Help: Set Up Deflection for Disputed Transactions \(can be outdated or unavailable during release preview\)](#)

## Provide Timely Action For Disputed Transactions with Merchant Alerts

Transaction Dispute Management now integrates with Ethoca Alerts™ to raise timely merchant alerts for disputed transactions. This integration helps you directly communicate with the merchants involved in disputed transactions and serves as a preventive measure against chargebacks. When merchants respond to these alerts, the alert outcomes and their statuses are stored in Salesforce. Your dispute case owners can use the alert status and outcome to efficiently track and monitor the end-to-end dispute resolution workflow.

**Where:** This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

SEE ALSO:

[Salesforce Help: Enable Merchant Alerts for Disputed Transactions \(can be outdated or unavailable during release preview\)](#)

## Streamline Dispute-Related Communications with Prebuilt Email Prompt Templates

Empower your dispute case owners to quickly pick the right email templates and draft high-quality emails. Make their workflow easier and eliminate the need to maintain numerous static email or mail-merge templates. The dispute case owners can use scenario-specific prompt templates and AI-driven drafting to effortlessly generate efficient and personalized communications to acknowledge dispute requests and to communicate their outcomes. These templates dynamically fetch the relevant data related to the dispute and include the data in the AI-driven email draft.

**Where:** This feature is available in Lightning Experience in Unlimited edition where Financial Services Cloud and FSC Service AI Add-On are enabled.

**Why:** The prompt templates are embedded in the standard email composer making it readily available to the dispute case owners in the context of their dispute workflow. Based on the stage that a dispute request is in the dispute workflow, the dispute case owners can select the appropriate prompt template. Save these prompt templates as new templates and customize the new templates to suit the needs of your business.

**How:** As a dispute case owner, on a dispute or a dispute item record page, in the Work Guide component, click **Open Email Composer**. From the Draft with Einstein GPT dropdown, select the required dispute-related email prompt template. If you're acknowledging the submission of a dispute request, select **Transaction Dispute Request Acknowledgement Email** and if you're communicating the outcome of a dispute request, select **Transaction Dispute Request Closure Email**. Review the generated email subject and body before sending the email.

SEE ALSO:

[Salesforce Help: Einstein Generative AI to Compose and Send Emails for Transaction Dispute Requests](#)

## Help Your Customers Raise Transaction Disputes Easily

Offer a self-guided experience for your customers to raise transaction disputes. Configure a self-service portal using the Financial Services Client Portal template and add the prebuilt dispute intake OmniScript to the Action Launcher. Your customers can initiate dispute requests without contacting your service agents.

**Where:** This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

**How:** From Setup, in the Quick Find box, enter *Digital Experiences*, and then select **All Sites**. Click **Builder** to work with your Financial Services Client Portal. Select **Action Launcher** and add the deployment that contains the dispute intake OmniScript.

SEE ALSO:

[Salesforce Help: Transaction Dispute Management as a Self-Service Process](#)

## Service Process Automation

Learn about the new prebuilt service processes for wealth management.

### [Streamline Wealth Management Services with Prebuilt Service Processes](#)

Your service agents can efficiently collect data for various service requests by using intuitive intake forms. Each process features an OmniScript for request intake, available for both assisted and self-service channels. Customize the OmniScript effortlessly with a low-code approach to meet your specific business needs.

## Streamline Wealth Management Services with Prebuilt Service Processes

Your service agents can efficiently collect data for various service requests by using intuitive intake forms. Each process features an OmniScript for request intake, available for both assisted and self-service channels. Customize the OmniScript effortlessly with a low-code approach to meet your specific business needs.

**Where:** This feature is available in Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

**Why:** Easily deploy prebuilt service processes to your Salesforce org to accelerate the transformation of your wealth management service operations. The prebuilt service processes use the power of Service Process Studio to streamline service requests. The service processes include flows and email templates for streamlined fulfillment, and BIAN-aligned outbound Mulesoft APIs for integration with the Custodial or Books and Records platform.

The service processes that you can deploy include:

- **Manage Beneficiaries:** Add, modify, or remove primary and contingent beneficiaries, who receive benefits from their accounts.
- **Update Profile:** Update personal details, ensuring accurate and up-to-date information for communication and account management.
- **Manage Standing Instructions:** Establish recurring payments for consistent and on-time transactions.
- **Set Up Required Minimum Distribution (RMD):** Set up Required Minimum Distributions for compliance and efficient fund management.
- **Initiate Automated Account Transfer (ACAT):** Easily initiate automated account transfers.

SEE ALSO:

[Salesforce Help: Install the Unmanaged Extension Package for Prebuilt Wealth Management Service Processes](#)

[Wealth Management Service Processes for Financial Services Cloud](#)

[Self-Service for Wealth Management Service Processes](#)

## Integrated Onboarding

Quickly review the status of your integration callouts by using Integration Orchestration (pilot).


### [Streamline Integration Callouts with Integration Orchestration \(Pilot\)](#)

Your users can now review the status of integration callouts such as identity verification and anti-money laundering screening. Users can effortlessly track the integrations, create an integration plan, and run the plan - all at one place.

## Streamline Integration Callouts with Integration Orchestration (Pilot)

Your users can now review the status of integration callouts such as identity verification and anti-money laundering screening. Users can effortlessly track the integrations, create an integration plan, and run the plan - all at one place.

**Where:** This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

 **Note:** This feature isn't generally available and is being piloted with certain Customers subject to additional terms and conditions. It isn't part of your purchased Services. This feature is subject to change, may be discontinued with no notice at any time at Salesforce's sole discretion, and Salesforce 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. To participate in this pilot, contact your account executive.

SEE ALSO:

[Salesforce Help: Set Up Integration Orchestration \(Pilot\)](#)

## New and Changed Financial Services Cloud Object Fields

Do more with new and updated Financial Services Cloud objects.

### Financial Plans and Goals

**Represents a financial plan for a person account.**

Use the new `FinancialPlan` object.

**Represents a junction between the financial goal and financial account that contributes towards the goal.**

Use the new `FinancialGoalFunding` object.

**New fields on the FinancialGoal object.**

Use the new fields `FinancialPlanID`, `EstimatedSuccessPercent`, `Category`, and `Frequency`.

### Application Objects

**Updated field values on RecAirtDataSrcExpSetDef object.**

Field `ExpressionSetObject` picklist values removed.

**Updated fields on Applicant object.**

Field `Prefix` removed.

Field `Salutation` added.

**New fields on the ApplicationFormProduct object.**

Field `Stage` added.

Field `Applicant Visible Status` added.

### Transaction Dispute Management

**Store the details of a dispute that involves one or multiple disputed transactions**

Use the updated `Dispute` object.

**Store the details of a transaction that's being disputed**

Use the updated `DisputeItem` object.

**Store the details of the alert sent by the card issuer to the merchant**

Use the new `DisputeItemMerchantAlert` object.

### New Apex Classes

Developer feature Apex classes.

### **FSCFinancialAccountService Class**

Returns True if the FinancialAccountMgmtPref permission is enabled in the org. Namespace is fschousehold.

### **FSCGoalService Class**

Returns either picklist values of a Financial Goal object or True if the user has Create, Edit, or Delete access to the FinancialGoal object. Namespace is fschousehold.

### **FSCHouseholdService Class**

Accepts a Person Account ID corresponding to a member of a Household and returns the other Household members. Namespace is fschousehold.

### **FSCPlansAndGoalsUtil Class**

Provides utilities to the other Financial Plans and Goals Apex classes. Namespace is fschousehold.

### **DisputeManagementHelper Class**

FSCPlanService Class

## **New Connect APIs**

Developer features connect APIs.

### **Financial Goals**

Manage the Financial Account funding sources when you create or update Financial Goals.

### **Service Process Studio**

Create a Transaction Dispute use case based on the Service Process Studio Connect API.

### **Discovery Framework**

Save questions and responses from a Discovery Framework OmniScript in an Assessment object and related objects.

## **New Invocable Actions**

Developer feature Invocable Actions.

### **Create Integration Plan**

Create an Integration Plan based on an object such as an Application, Applicant, or PartyProfile ID, using a BRE Expression Set to make decisions and Dynamic Fulfillment Orchestration to create related object records.

### **Run Integration Plan**

Run an integration plan using Dynamic Fulfillment Orchestration, while each callout step is enqueued followed by its dependencies.

## Mulesoft Wealth Management REST APIs

Developer features Mulesoft.

### Add a beneficiary to an account

Make a POST request to the new `/InvestmentAccounts/Initiate` resource.

### Update beneficiary details

Make a PATCH request to the new `/InvestmentAccounts/Update` resource.

### Delete a beneficiary from an account

Make a DELETE request to the new `/InvestmentAccounts/Delete` resource.

### Update customer details

Make a PATCH request to the new `/customers/{customerId}` resource.

### Process automated customer account transfer service requests

Make a POST request to the new `/InvestmentAccounts/{accountId}/acats` resource.

### Retrieve details and beneficiaries for all linked accounts

Make a GET request to the new `/InvestmentAccounts/{accountId}/Retrieve` resource.

### Process required minimum distributions

Make a POST request to the new `/InvestmentAccounts/{accountId}/RMD` resource.

### Retrieve payment details

Make a GET request to the new `/InvestmentAccounts/{accountId}/Payments/Retrieve` resource.

### Process payments

Make a POST request to the new `/InvestmentAccounts/{accountId}/Payments/Initiate` resource.

### Cancel payments

Make a PATCH request to the new `/InvestmentAccounts/{accountId}/Payments/Update` resource.

## Health Cloud

Home Health optimizes visit scheduling and now supports group visits and dependent visits. Integrated Care Management supports more ways to create, update, and view care plans. Provider Search has a new FlexCard that supports more targeted searches across more data. Referral Management has a new guided process to boost referral numbers and new dashboards to get greater insights into referral trends. Use new and updated user interfaces to track assessments better.

### [Advanced Therapy Management Enhancements](#)

Leverage the new Electronic Signatures framework to record Chain of Custody events with electronic signatures and help users track when their signatures are required. Optimize time-to-therapy by overriding work type step lead times by country and by site, and maintaining a hierarchy of site overrides by location. Maximize manufacturing site utilization and optimize logistics lead time by overriding lead times based on site-to-site relationships and modeling transportation logistics as work types in a work procedure. Control who can see appointments in a work procedure by user profile.

### [Assessments Enhancements](#)

Boost user productivity with Assessments enhancements in Health Cloud. The new Assessment History and Assessment Questions components offer a complete view of a person's assessment scores. Manage Assessments all in one place by adding the Assessments component to your application home pages. Prefilled responses for assessment questions help users complete assessments faster. Users can now open completed assessments in View mode. Patients who access Experience Cloud sites as authenticated users have a clearer view of their pending and completed assessments.

### [Electronic Signatures](#)

Set up signature trails to capture electronic signatures for key record updates or workflow steps in Health Cloud. Help your users track pending signatures.

### [Home Health Enhancements](#)

Home Health now provides advanced home visit scheduling with better optimization and more effective resource utilization. Schedulers can easily broadcast and cancel visits, schedule dependent visits and group visits, and reschedule subsequent recurring visits. Care resources can deliver timely and effective care and proactively improve patient safety with medication administration capabilities.

### [Integrated Care Management Enhancements](#)

Use the new OmniScript flow to update the problems, goals, and interventions in care plans using additional completed assessments. Associate existing cases and clinical service requests with new care plans, and use the care plan interface on the case and clinical service request record pages to manage these care plans.

### [Interoperability for Health](#)

Use the new FHIR API for documentReference to search, send, update, or read documents from Salesforce Health Cloud. Mulesoft Direct for Health Cloud now includes three package integrations, Patient Summary - Blue Button 2.0, Bulk Clinical Data Sync, and QHIN (Kno2) Integration APIs that can be discovered, deployed, and configured within Salesforce set-up screens.

### [Medication Review and Medication Management Enhancements and Updates](#)

Medication Management helps your clinicians to perform a medication therapy review with a custom flow that meets your business needs. With the deprecation of the RxNorm Interaction API, Medication Management no longer supports the identification of potential drug-to-drug interactions.

### [Provider Network Management Enhancements](#)

Provider Network Management now also includes contract lifecycle management capabilities to help manage contracts efficiently.

### [Provider Search Enhancements](#)

Enhance the provider search experience by searching across more provider data, configuring the search results display, and customizing search result filters. Use up to 40 custom fields in provider searches.

### [Referral Management Enhancements](#)

Modernize your referral process by creating a digital channel that guides guest users through creating a referral. Engage referred patients faster by coordinating care and completing assessments directly on clinical service requests. Gain insights into referral patterns, top referral resources, and provider performance by using the new Referral Management app.

### [CRM Analytics Enhancements for Health Cloud](#)

Get insights into referrals by using the new Referral Analytics dashboards included in the Enhanced Analytics for Healthcare app.

### [Health Cloud Has New and Changed Objects](#)

Store and access more data with these new and changed Health Cloud objects.

### [Create Custom Report Types for More Objects](#)

Gain better visibility into Health Cloud data and make informed decisions by creating report types for more objects.

### [New and Changed Invocable Actions in Health Cloud](#)

Use the new and changed invocable actions for Health Cloud.

### [New Connect REST API Resources in Health Cloud](#)

Connect REST APIs help customers, partners, and ISVs integrate with Salesforce software and UIs.

### [Update Sharing Settings for the Operating Hours Object](#)

Sharing is now enabled and sharing settings are available for Operating Hours. Admins of existing orgs with unauthenticated (guest) users must manually create the sharing rules according to their requirements. If their users access Operating Hours via Salesforce Scheduler, they must set the value of the `enableDepriveSoqlAccessGuestUserOrgPref` field for the `IndustriesSettings` Metadata API to `true`.

## New and Enhanced Common Features for Industries

Health Cloud includes access to some features that are available across clouds and products in Industries. Use these features to extend and customize Health Cloud based on your business needs.

- [Action Launcher](#)

Contact center agents can quickly resolve customer requests by launching button- and link-based actions and the service processes associated with service catalogs. You can now customize the title shown on the Action Launcher component. If out-of-the-box deployments are available, you can use them right away to configure Action Launcher.

- [Actionable Segmentation](#)

Use predefined Data Processing Engine definitions to create actionable list definitions easily and quickly. To help list creators easily filter dataset records to add to their actionable lists, set the filter input format for the applicable dataset columns as Multi-Select Picklist. List creators can now use filter templates to save the time and effort required to filter dataset records.

- [Business Rules Engine](#)

Call the ready-to-use executable expression set templates from flows. Create precise rules with the operators and functions that consider null values. Use the enhancements in decision tables to simplify and streamline lookups. Show your users more targeted and nuanced explanations for expression set version step results with the enhancements in Decision Explainer.

- [Criteria-Based Search and Filter](#)

Search across more provider data, configure the search results display, and customize search result filters by using Provider Search with Criteria-Based Search and Filter.

- [Data Processing Engine](#)

Enjoy more Data Cloud flexibility in your definitions with more objects types to choose from in data source and writeback nodes. Choose Data Cloud Data Spaces for your definition. Troubleshoot quickly by restoring previous field selections in your data source when you encounter an issue with a reference node. Upload CSV file data and write it back to an entity in Salesforce.

- [Timeline](#)

Configure Timeline to show engagement events from a specific data space in Data Cloud.



## Advanced Therapy Management Enhancements

Leverage the new Electronic Signatures framework to record Chain of Custody events with electronic signatures and help users track when their signatures are required. Optimize time-to-therapy by overriding work type step lead times by country and by site, and maintaining a hierarchy of site overrides by location. Maximize manufacturing site utilization and optimize logistics lead time by overriding lead times based on site-to-site relationships and modeling transportation logistics as work types in a work procedure. Control who can see appointments in a work procedure by user profile.

### [Record Chain of Custody Events with Electronic Signatures](#)

Reduce turnaround time by capturing electronic signatures within Health Cloud to record Chain of Custody events in the therapy workflow. Leverage the new Electronic Signatures framework in Health Cloud to set up signature trails and validate signer credentials. Map the designated verifiers to participant roles defined in teams and help the designated verifiers track when their signatures are required.

### [Override Lead Times Based on Site-to-Site Relationships](#)

Maximize manufacturing site utilization and optimize logistics lead time by scheduling appointment chains that respect prioritized site-to-site relationships. You can override the lead time for a work type step based on the combination of source site and destination site. The lead time override only applies to the work type step, not the work type.

### [Maintain a Hierarchy of Site Overrides by Location](#)

Optimize time-to-therapy and determine optimum lead time for a work type step by configuring a hierarchy of geographical overrides for each work type. The location at the lowest granular level has the highest priority. For example, in a Site-Country-Region hierarchy, Site has the highest priority.

### [Override Work Type Step Lead Times by Country and by Site](#)

Optimize time to therapy by representing regulatory or operational variances in lead time based on the location. You can override the lead times of individual work type steps, or add or remove work type step lead times by country and by site. You can also include further geographical dimensions such as regions or continents.

### [Schedule Transportation Logistics in a Work Procedure](#)

Compute infusion dates with greater confidence by configuring transportation logistics as work types with their own slots and lead times. Coordinators can book appointment slots that represent transportation logistics, such as site pickup times that differ from the previous work type's end time.

### [Show or Hide Appointments in a Work Procedure by User Profile](#)

Streamline who can see all appointments in an appointment chain and who can see only appointments relevant to their role. For example, while the Gene Therapy Coordinator sees all the appointments in an appointment chain, the Qualified Treatment Center Coordinator doesn't see the manufacturing appointments.

## Record Chain of Custody Events with Electronic Signatures

Reduce turnaround time by capturing electronic signatures within Health Cloud to record Chain of Custody events in the therapy workflow. Leverage the new Electronic Signatures framework in Health Cloud to set up signature trails and validate signer credentials. Map the designated verifiers to participant roles defined in teams and help the designated verifiers track when their signatures are required.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions with the Health Cloud or Health Cloud for Life Sciences license.

**Who:** This feature is available to users with the Health Cloud Advanced Therapy Orchestration permission set and the Health Cloud Advanced Therapy Orchestration permission set license.

**How:** After you set up Electronic Signatures, add the Digital Verification Setup field to the Custom Verification Type Override object's page layout. Generate and activate the Digital Verification Configuration decision table. Then create or edit Custody Verification Type Override records to connect signature trails to custody items.

SEE ALSO:

[Confirm Key Record Updates or Workflow Steps with Electronic Signatures](#)

[Salesforce Help: Set Up Electronic Signatures for Health Cloud \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Configure Custody Records with Workflows \(can be outdated or unavailable during release preview\)](#)

## Override Lead Times Based on Site-to-Site Relationships

Maximize manufacturing site utilization and optimize logistics lead time by scheduling appointment chains that respect prioritized site-to-site relationships. You can override the lead time for a work type step based on the combination of source site and destination site. The lead time override only applies to the work type step, not the work type.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions with the Health Cloud or Health Cloud for Life Sciences license.

**Who:** This feature is available to users with the Multi-Step Scheduling permission set and the Multi-Step Scheduling permission set license.

**How:** From the Object Manager in Setup, add the Work Type Service Territory and Related Work Type Service Territory fields to the page layout of the Work Type Step Lead Time Overrides object. Use these fields to define site-to-site relationships when you create work type step lead time records.

SEE ALSO:

[Salesforce Help: Override Default Lead Time Based on Hierarchy \(can be outdated or unavailable during release preview\)](#)

## Maintain a Hierarchy of Site Overrides by Location

Optimize time-to-therapy and determine optimum lead time for a work type step by configuring a hierarchy of geographical overrides for each work type. The location at the lowest granular level has the highest priority. For example, in a Site-Country-Region hierarchy, Site has the highest priority.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions with the Health Cloud or Health Cloud for Life Sciences license.

**Who:** This feature is available to users with the Multi-Step Scheduling permission set and the Multi-Step Scheduling permission set license.

**How:** Set site priority for all sites when you define work type step overrides.

SEE ALSO:

[Salesforce Help: Override Default Lead Time Based on Hierarchy \(can be outdated or unavailable during release preview\)](#)

## Override Work Type Step Lead Times by Country and by Site

Optimize time to therapy by representing regulatory or operational variances in lead time based on the location. You can override the lead times of individual work type steps, or add or remove work type step lead times by country and by site. You can also include further geographical dimensions such as regions or continents.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions with the Health Cloud or Health Cloud for Life Sciences license.

**Who:** This feature is available to users with the Multi-Step Scheduling permission set and the Multi-Step Scheduling permission set license.

**How:** Set site priority for all sites when you define work type step overrides.

SEE ALSO:

[Salesforce Help: Override Default Lead Time Based on Hierarchy \(can be outdated or unavailable during release preview\)](#)

## Schedule Transportation Logistics in a Work Procedure

Compute infusion dates with greater confidence by configuring transportation logistics as work types with their own slots and lead times. Coordinators can book appointment slots that represent transportation logistics, such as site pickup times that differ from the previous work type's end time.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions with the Health Cloud or Health Cloud for Life Sciences license.

**Who:** This feature is available to users with the Multi-Step Scheduling permission set and the Multi-Step Scheduling permission set license.

**How:** Model transportation logistics as a work type with its own lead time and add it as a work procedure step in a procedure. Coordinators book the transportation step as an appointment when they book slots for the work procedure. You can now schedule a maximum of 10 work types in a work procedure.

SEE ALSO:

[Salesforce Help: Set Up a Work Type for Advanced Therapy Management \(can be outdated or unavailable during release preview\)](#)

## Show or Hide Appointments in a Work Procedure by User Profile

Streamline who can see all appointments in an appointment chain and who can see only appointments relevant to their role. For example, while the Gene Therapy Coordinator sees all the appointments in an appointment chain, the Qualified Treatment Center Coordinator doesn't see the manufacturing appointments.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions with the Health Cloud or Health Cloud for Life Sciences license.

**Who:** This feature is available to users with the Multi-Step Scheduling permission set and the Multi-Step Scheduling permission set license.

**How:** Use standard Salesforce platform sharing mechanisms to control the visibility of work procedure steps by user profile.

SEE ALSO:

[Salesforce Help: Create Profiles for Advanced Therapy Management Users \(can be outdated or unavailable during release preview\)](#)

## Assessments Enhancements

Boost user productivity with Assessments enhancements in Health Cloud. The new Assessment History and Assessment Questions components offer a complete view of a person's assessment scores. Manage Assessments all in one place by adding the Assessments component to your application home pages. Prefilled responses for assessment questions help users complete assessments faster. Users can now open completed assessments in View mode. Patients who access Experience Cloud sites as authenticated users have a clearer view of their pending and completed assessments.

### [Evaluate Assessment Scores](#)

You can now evaluate assessment scores and track score changes over time. Assessment scoring provides you with insightful data, and empowers you to take preventative measures and timely actions to reach your goals more quickly. Use the new Response Value Score field in the Assessment Question Response object to assign a score to each response.

### [Track Patient Progress Using Assessment History](#)

The Assessment History component provides a graphical and tabular representation of changes in a person's assessment scores over time. The quick, at-a-glance view makes it easy to monitor and understand progress, and improve outcomes.

### [Track Changes in Assessment Question Scores](#)

Get detailed insights into a person's progress by tracking changes in assessment question scores on the new Assessment Questions component. The component uses intuitive icons for each assessment question to visually represent changes in scores. When expanded, each question has a graph and table showing the score for each assessment attempt. Monitoring score trends at the assessment question-level helps in timely interventions and improved outcomes.

### [View and Manage All Patient Assessments in One Place](#)

To give care coordinators like intake specialists and behavioral health specialists quick access to assessments for all of their assigned patients, add the Assessment component to an app's home page. This centralized view helps care coordinators save time and quickly identify cases that require attention. Previously, users managed assessments for one patient at a time on individual record pages.

### [Improve Patient Experiences with Prefilled Assessments](#)

Focus on the patient's story and avoid entering or requesting the same information more than one time. Patients and healthcare professionals can verify auto-populated data retrieved from their previous assessment responses.

### [Open Completed Assessments in View Mode](#)

Get a comprehensive understanding of a person's history and progress by viewing complete assessment data as it was captured at the time of administration. View mode gives you a clear, unfiltered view of the assessment questions and responses.

### [Give Patients a Complete View of Their Assessments](#)

Patients who access Experience Cloud sites as authenticated users can easily start assessments on their To Do list and review the assessments they've completed. Filters help patients zero in on specific assessments based on a name and a date range. Patients can complete assessments at their convenience, and healthcare practitioners can focus on providing care and minimize the time spent on gathering information.

### [Save Assessments as Drafts to Complete Later](#)

Internal users such as care coordinators and healthcare specialists can save drafts of assessments that they're not ready to submit. They can easily find the draft assessments that are in progress and complete them at their convenience later. The flexibility to save drafts prevents loss of work when users pause an assessment for any reason.

## Evaluate Assessment Scores

You can now evaluate assessment scores and track score changes over time. Assessment scoring provides you with insightful data, and empowers you to take preventative measures and timely actions to reach your goals more quickly. Use the new Response Value Score field in the Assessment Question Response object to assign a score to each response.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions with Health Cloud.

**Who:** This feature is available to users with the Industries Assessment permission set license.

**How:** In Setup, add the Response Value Score field to the Assessment Question Response page using the page layout editor. If you started using Discovery Framework after the Spring '24 release, you can skip this task.

SEE ALSO:

[Salesforce Help: Set Up Score Evaluation \(can be outdated or unavailable during release preview\)](#)

## Track Patient Progress Using Assessment History

The Assessment History component provides a graphical and tabular representation of changes in a person's assessment scores over time. The quick, at-a-glance view makes it easy to monitor and understand progress, and improve outcomes.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions with Health Cloud.

**Who:** This feature is available to users with the Industries Assessment permission set license.

**How:** Place the DiscoveryFrameworkAssessmentHistory FlexCard on the assessment record page.

SEE ALSO:

[Salesforce Help: Set Up Assessment Score Tracking and Analysis \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Enable Users to Track Assessment Scores \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Create and Configure Lightning Experience Record Pages](#)

## Track Changes in Assessment Question Scores

Get detailed insights into a person's progress by tracking changes in assessment question scores on the new Assessment Questions component. The component uses intuitive icons for each assessment question to visually represent changes in scores. When expanded, each question has a graph and table showing the score for each assessment attempt. Monitoring score trends at the assessment question-level helps in timely interventions and improved outcomes.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions with Health Cloud.

**Who:** This feature is available to users with the Industries Assessment permission set license.

**How:** After you add the Response Value Score field to the Assessment Question Response page, configure the Get Assessment Response Score flow with your own score evaluation tool. Then, place the DiscoveryFrameworkAssessmentQuestionsList and the DiscoveryFrameworkAssessmentQuestion FlexCards on the assessment record page.

SEE ALSO:

[Salesforce Help: Set Up Assessment Score Tracking and Analysis \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Create and Configure Lightning Experience Record Pages](#)

## View and Manage All Patient Assessments in One Place

To give care coordinators like intake specialists and behavioral health specialists quick access to assessments for all of their assigned patients, add the Assessment component to an app's home page. This centralized view helps care coordinators save time and quickly identify cases that require attention. Previously, users managed assessments for one patient at a time on individual record pages.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions with Health Cloud.

**Who:** This feature is available to users with the Industries Assessment permission set license.

**How:** In the Lightning App Builder, add the Assessment component to a home page layout.

SEE ALSO:

[Salesforce Help: Add the Assessment Component to Record Pages \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Lightning App Builder](#)

## Improve Patient Experiences with Prefilled Assessments

Focus on the patient's story and avoid entering or requesting the same information more than one time. Patients and healthcare professionals can verify auto-populated data retrieved from their previous assessment responses.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions with Health Cloud.

**Who:** This feature is available to users with the Industries Assessment permission set license and the Run Decision Table permission.

**How:** From Setup, in the Quick Find box, enter *Assessments*, and then select **Prefill Assessment Question Settings**. Then, follow the guided setup instructions on the page to set up prefill questions, configure the prebuilt decision table, update OmniScripts, and assign required permissions.

SEE ALSO:

[Salesforce Help: Prefill Assessment Questions with Previously Submitted Responses \(can be outdated or unavailable during release preview\)](#)

## Open Completed Assessments in View Mode

Get a comprehensive understanding of a person's history and progress by viewing complete assessment data as it was captured at the time of administration. View mode gives you a clear, unfiltered view of the assessment questions and responses.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions with Health Cloud.

**Who:** This feature is available to users with the Industries Assessment permission set license.

**How:** This change is available to your users without any additional configuration.

## Give Patients a Complete View of Their Assessments

Patients who access Experience Cloud sites as authenticated users can easily start assessments on their To Do list and review the assessments they've completed. Filters help patients zero in on specific assessments based on a name and a date range. Patients can complete assessments at their convenience, and healthcare practitioners can focus on providing care and minimize the time spent on gathering information.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions with Health Cloud.

**Who:** This feature is available to users with the Industries Assessment permission set license, the Assessment Envelope for Community Users permission set, the OmniStudio User permission set, access to Discovery Framework-specific objects and fields, and the Customer Community Plus User profile assignment.

**How:** If you haven't already done so, give patients access to assessments on an Experience Cloud site. From Setup, in the Quick Find box, enter *Assessments*, and then select **Assessment Settings**. Enable **External User Assessments**. Previously, this setting was named Guest User Assessments. To customize tab names in your Experience Cloud site, use Lightning App Builder to configure the

External User Assessments component. Add the External User Assessments component to an existing Experience Cloud site or set up a new site.

SEE ALSO:

[Salesforce Help: Give External Users Access to Assessments \(can be outdated or unavailable during release preview\)](#)

## Save Assessments as Drafts to Complete Later

Internal users such as care coordinators and healthcare specialists can save drafts of assessments that they're not ready to submit. They can easily find the draft assessments that are in progress and complete them at their convenience later. The flexibility to save drafts prevents loss of work when users pause an assessment for any reason.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions with Health Cloud and Discovery Framework.

**Who:** This feature is available to users with the Industries Assessment permission set license.

**How:** To use this feature in the AUDIT-C, GAD-7, and PHQ-9 sample assessments, activate the latest versions of these sample assessments. To configure the **Save for later** option in a custom assessment, open the assessment OmniScript in the OmniScript Designer. In the Setup panel, select **Allow Save For Later**. Find the Seed Data JSON section and then click **+ Add New Key/Value Pair**. For Key, enter *UsageType*. For Value, enter *HCUUsageType*.

As an internal user, to save an assessment for later, click **Save for later**. To finish an assessment, click the action menu on an assessment in progress and select **Continue**.

SEE ALSO:

[Salesforce Help: Enable Sample Assessments](#)

[Salesforce Help: Create an Assessment with Discovery Framework](#)

[Salesforce Help: Complete a Patient's Assessment \(can be outdated or unavailable during release preview\)](#)

## Electronic Signatures

Set up signature trails to capture electronic signatures for key record updates or workflow steps in Health Cloud. Help your users track pending signatures.

### [Confirm Key Record Updates or Workflow Steps with Electronic Signatures](#)

Reduce turnaround time for electronic records that require a signature trail by capturing electronic signatures from directly within Health Cloud. Users can sign electronic records on the same device or different devices to verify key record updates. For instance, users can capture consent for benefit verification or record workflow steps such as Chain of Custody events in Advanced Therapy Management.

### [Show Pending Signatures](#)

Help users track when they need to sign key record or workflow updates by embedding the Digital Verification List component anywhere within your org. This component is compatible with application home pages, all record pages, Lightning web components, and Salesforce Flows.

## Confirm Key Record Updates or Workflow Steps with Electronic Signatures

Reduce turnaround time for electronic records that require a signature trail by capturing electronic signatures from directly within Health Cloud. Users can sign electronic records on the same device or different devices to verify key record updates. For instance, users can capture consent for benefit verification or record workflow steps such as Chain of Custody events in Advanced Therapy Management.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions with the Health Cloud or Health Cloud for Life Sciences license.

**Who:** This feature is available to users with the Health Cloud Advanced Therapy Orchestration permission set and the Health Cloud Advanced Therapy Orchestration permission set license.

**How:** Create a signature trail that sets the number of signatures required and whether designated verifiers must sign the records in sequence or parallel. Define signature details such as the order of designated verifiers and whether designated verifiers belong to a user group or have a specific participant role. You can leave a verifier blank during setup and assign a specific user at runtime. In Setup, configure a connected app, authentication provider, and named credential to validate the signers' user credentials.

SEE ALSO:

[Salesforce Help: Electronic Signatures in Health Cloud \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Set Up Electronic Signatures for Health Cloud \(can be outdated or unavailable during release preview\)](#)

## Show Pending Signatures

Help users track when they need to sign key record or workflow updates by embedding the Digital Verification List component anywhere within your org. This component is compatible with application home pages, all record pages, Lightning web components, and Salesforce Flows.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions with the Health Cloud or Health Cloud for Life Sciences license.

**Who:** This feature is available to users with the Health Cloud Advanced Therapy Orchestration permission set and the Health Cloud Advanced Therapy Orchestration permission set license.

**How:** After you set up Electronic Signatures, deploy the Digital Verification List component by editing an application home page or a record page such as the Care Program Enrollee record page. From the Pending Signatures section, users can view a list of pending signatures open for signing or rejected but still open.

SEE ALSO:

[Salesforce Help: Add the Pending Signature Component to a Page \(can be outdated or unavailable during release preview\)](#)

## Home Health Enhancements

Home Health now provides advanced home visit scheduling with better optimization and more effective resource utilization. Schedulers can easily broadcast and cancel visits, schedule dependent visits and group visits, and reschedule subsequent recurring visits. Care resources can deliver timely and effective care and proactively improve patient safety with medication administration capabilities.

### [Reduce No-Shows By Broadcasting Available Home Visits](#)

Handle the ever-increasing demand for care resources, enhance operational efficiency, and provide timely patient care with the new Broadcast option for home visits. Schedulers can now quickly and easily broadcast up to 50 home visits to three service regions in one go. Care resources with matching skills in those regions receive a notification about the visits on their Field Service Mobile app that they can choose to accept. Use the new Broadcast Home Healthcare Visit flow to optimize the complex scheduling process and provide a seamless broadcasting experience.

### [Promote Optimal Patient Health Outcomes With Dependent Home Visits](#)

Schedulers can now create two dependent visits in one go for patients who require more complex home healthcare services. In dependent visits, two care resources provide different services to a patient at the same time, while focusing on care continuity and improved care quality.



### [Bundle Home Visits to Simplify Scheduling](#)

Schedulers can now group the visits scheduled for multiple patients in nearby locations and with similar health conditions. The new Bundle Home Healthcare Visits flow bundles such patient visits into a group visit and assigns a single care resource to perform the visit. Group visits are easy to schedule, provide better tracking, improve patient experience, and reduce the costs for several health conditions. Compared with individual visits, care resources also save travel time and can handle the visits in any sequence.

### [Streamline Patient Care With Effective Medication Administration](#)

Improve patient safety, medication adherence, and health outcomes by administering medications to your patients during a home visit. If a patient's care service routine requires medication administration, your clinicians now see the task listed under the visit in their Field Service Mobile app. Clinicians can specify the medication, add dosage details, and indicate the completion of the task for future tracking and reference.

### [Easily Reschedule a Series of Recurring Home Visits](#)

Reduce administrative delays and procedural hassles by empowering your schedulers to reschedule all subsequent recurring home visits at once. Use the enhanced Reschedule Home Healthcare Visit flow to reschedule recurring visits depending on a patient's availability and preference.

### [Cancel Home Visits in Bulk](#)

Your schedulers can now cancel single or multiple upcoming visits if your care resources or patients can't make it to their appointments on the scheduled date. This quick and effective way to cancel visits in bulk helps save time, minimize manual errors, and promote efficient resource utilization.

### [Optimize Operations with the Updated Guided Setup for Home Health](#)

Home Health's guided setup now includes new steps for setting up visit broadcasts, medication administration, dependent and group visits, and more. Shorten implementation time by following simple, clear steps for necessary tasks such as prerequisite checks and process setups, all from one place.

## Reduce No-Shows By Broadcasting Available Home Visits

Handle the ever-increasing demand for care resources, enhance operational efficiency, and provide timely patient care with the new Broadcast option for home visits. Schedulers can now quickly and easily broadcast up to 50 home visits to three service regions in one go. Care resources with matching skills in those regions receive a notification about the visits on their Field Service Mobile app that they can choose to accept. Use the new Broadcast Home Healthcare Visit flow to optimize the complex scheduling process and provide a seamless broadcasting experience.

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

**How:** From the Object Manager, edit the page layout of Schedule Broadcast Appointment. From the Mobile & Lightning Actions menu, add the **Accept Visit** quick action to the Salesforce Mobile and Lightning Experience Actions section of the page layout.

Then, in the Field Service Mobile App Builder, add a tab for the Schedule Broadcast Appointment Resource list view.

### SEE ALSO:

[Salesforce Help: Broadcast Visits with Home Health](#)

[Salesforce Help: Accept Broadcasted Home Visits](#)

[Salesforce Help: Set Up Home Visit Broadcasting](#)

## Promote Optimal Patient Health Outcomes With Dependent Home Visits

Schedulers can now create two dependent visits in one go for patients who require more complex home healthcare services. In dependent visits, two care resources provide different services to a patient at the same time, while focusing on care continuity and improved care quality.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions with the Health Cloud and the Home Health add-on licenses.

**Who:** This feature is available to users with the Manage Home Health permission set license.

**Why:** Use the enhanced Schedule Home Healthcare Visit flow to automatically determine the number of care resources required for a patient's service request. Depending on the resource count, the flow schedules either a single visit or two dependent visits for the same start time and assigns care resources having the required skills. This change helps schedulers save time, reduce manual effort, and stay on top of complex and multistage home visits.

**How:** From the App Launcher, go to the Field Service Admin app. Click **Scheduling**, select **General Logic**, and then select **Enable complex work**.

SEE ALSO:

[Salesforce Help: Set Up Dependent Home Visits](#)

[Salesforce Help: Schedule Dependent Visits with Home Health](#)

## Bundle Home Visits to Simplify Scheduling

Schedulers can now group the visits scheduled for multiple patients in nearby locations and with similar health conditions. The new Bundle Home Healthcare Visits flow bundles such patient visits into a group visit and assigns a single care resource to perform the visit. Group visits are easy to schedule, provide better tracking, improve patient experience, and reduce the costs for several health conditions. Compared with individual visits, care resources also save travel time and can handle the visits in any sequence.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions with the Health Cloud and the Home Health add-on licenses.

**Who:** This feature is available to users with the Manage Home Health permission set license.

**How:** From the App Launcher, go to Appointment Bundle Policies and create a bundle policy for home visits.

SEE ALSO:

[Salesforce Help: Create a Bundle Policy for Group Visits](#)

[Salesforce Help: Schedule Group Visits with Home Health](#)

## Streamline Patient Care With Effective Medication Administration

Improve patient safety, medication adherence, and health outcomes by administering medications to your patients during a home visit. If a patient's care service routine requires medication administration, your clinicians now see the task listed under the visit in their Field Service Mobile app. Clinicians can specify the medication, add dosage details, and indicate the completion of the task for future tracking and reference.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions in the Salesforce Field Service mobile app, with the Health Cloud and Home Health add-on licenses.

**Who:** To use the mobile app, see a patient's clinical data, and administer medications, users need the Home Health Clinician permission set license.

**How:** From Setup, go to Flows, and then clone and activate the Add Patient Medication for Home Visits flow.

Then, from the App Launcher, go to Work Step, and add the cloned flow as an action definition for medication administration-related work steps.

SEE ALSO:

[Salesforce Help: Set Up Medication Administration and Management for Home Visits](#)

[Salesforce Help: Administer Medications to Patients During Home Visits](#)

## Easily Reschedule a Series of Recurring Home Visits

Reduce administrative delays and procedural hassles by empowering your schedulers to reschedule all subsequent recurring home visits at once. Use the enhanced Reschedule Home Healthcare Visit flow to reschedule recurring visits depending on a patient's availability and preference.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions with the Health Cloud and the Home Health add-on licenses.

**Who:** This feature is available to users with the Manage Home Health permission set license.

**How:** In the Lightning App Builder, place the Home Health Visits lightning component on the Person Account record page.

From Setup, go to the Home Health Settings page and enable the latest version of the Reschedule Home Healthcare Visit flow.

SEE ALSO:

[Salesforce Help: Enable Latest Version of Reschedule Home Healthcare Visit Flow](#)

[Salesforce Help: Reschedule Subsequent Recurring Visits with Home Health](#)

## Cancel Home Visits in Bulk

Your schedulers can now cancel single or multiple upcoming visits if your care resources or patients can't make it to their appointments on the scheduled date. This quick and effective way to cancel visits in bulk helps save time, minimize manual errors, and promote efficient resource utilization.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions with the Health Cloud and the Home Health add-on licenses.

**Who:** This feature is available to users with the Manage Home Health permission set license.

**How:** In the Lightning App Builder, place the Home Health Visits lightning component on the Person Account record page.

SEE ALSO:

[Salesforce Help: Cancel Home Visits](#)

## Optimize Operations with the Updated Guided Setup for Home Health

Home Health's guided setup now includes new steps for setting up visit broadcasts, medication administration, dependent and group visits, and more. Shorten implementation time by following simple, clear steps for necessary tasks such as prerequisite checks and process setups, all from one place.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions with the Health Cloud and the Home Health add-on licenses.

**How:** From Setup, go to the Home Health Settings page to find the updated guided setup.

SEE ALSO:

[Salesforce Help: Set Up Home Health](#)

## Integrated Care Management Enhancements

Use the new OmniScript flow to update the problems, goals, and interventions in care plans using additional completed assessments. Associate existing cases and clinical service requests with new care plans, and use the care plan interface on the case and clinical service request record pages to manage these care plans.

### [Create Care Plans Using Care Plan Templates](#)

Give users more options when creating care plans using Integrated Care Management. In addition to assessments and care gaps, users can now use care plan templates as a method to quickly create care plans for frequently occurring cases. Using predefined templates to address common patient needs helps your users save the time they would have to spend administering assessments.

### [Update Care Plans Using Additional Assessments](#)

Update the problems, goals, and interventions in existing care plans using additional assessments. The new OmniScript flow recommends new problems, goals, and interventions based on the additional assessments that a user selects. A comparative view of the recommended and current problems, goals, and interventions makes it easier to update care plans as needed. When you update a care plan, you can have a single, comprehensive care plan for a patient, which makes it easier to monitor patient progress.

### [Associate An Existing Case and Clinical Service Request to a New Care Plan](#)

When creating a care plan using assessments, care gaps, or care plan templates, you can now link an existing case and clinical service request.

### [Manage Care Plans on Case and Clinical Service Request Record Pages](#)

You can now view, create, and manage related care plans on the case and clinical service request record pages. Previously, you could access the care plan interface only from the patient account record page. The new update makes care plans more easily accessible without having to navigate to the account record page each time.

## Create Care Plans Using Care Plan Templates

Give users more options when creating care plans using Integrated Care Management. In addition to assessments and care gaps, users can now use care plan templates as a method to quickly create care plans for frequently occurring cases. Using predefined templates to address common patient needs helps your users save the time they would have to spend administering assessments.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions with Health Cloud.

**Who:** This feature is available to users with the Care Plans Access permission set license.

**How:** Users can select up to three care plan templates by default when creating a care plan. To increase this number, update the `IndustriesHCCarePlanManager` FlexCard component in Lightning App Builder. If you've cloned the `IndustriesHCCarePlanManager` FlexCard to customize your UI, you have to clone the original FlexCard again and redo your customizations to use care plan templates. Users can then select **Care Plan Template** as the care plan creation method when they click the **New Care Plan** button.

SEE ALSO:

[Salesforce Help: Create an Enhanced Care Plan Using Care Plan Templates](#)

## Update Care Plans Using Additional Assessments

Update the problems, goals, and interventions in existing care plans using additional assessments. The new OmniScript flow recommends new problems, goals, and interventions based on the additional assessments that a user selects. A comparative view of the recommended and current problems, goals, and interventions makes it easier to update care plans as needed. When you update a care plan, you can have a single, comprehensive care plan for a patient, which makes it easier to monitor patient progress.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions with Health Cloud.

**Who:** This feature is available to users with the Care Plans Access permission set license.

## Associate An Existing Case and Clinical Service Request to a New Care Plan

When creating a care plan using assessments, care gaps, or care plan templates, you can now link an existing case and clinical service request.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions with Health Cloud.

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## Manage Care Plans on Case and Clinical Service Request Record Pages

You can now view, create, and manage related care plans on the case and clinical service request record pages. Previously, you could access the care plan interface only from the patient account record page. The new update makes care plans more easily accessible without having to navigate to the account record page each time.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions with Health Cloud.

**Who:** This feature is available to users with the Care Plans Access permission set license.

**How:** In the Lightning App Builder, place the IndustriesHCCarePlanManager FlexCard on the case record page and the clinical service request record page.

SEE ALSO:

[Salesforce Help: Add the Care Plan Interface to Record Pages](#)

## Interoperability for Health

Use the new FHIR API for documentReference to search, send, update, or read documents from Salesforce Health Cloud. Mulesoft Direct for Health Cloud now includes three package integrations, Patient Summary - Blue Button 2.0, Bulk Clinical Data Sync, and QHIN (Kno2) Integration APIs that can be discovered, deployed, and configured within Salesforce set-up screens.

[New Salesforce Healthcare APIs](#)

External systems can create, read, search, update data, or trigger processes in the Health Cloud using these FHIR APIs.

[MuleSoft Direct Integrations with Health Cloud](#)

MuleSoft Direct for Health Cloud offers comprehensive integration solutions tailored to fit the healthcare industry needs and use cases of businesses.

## New Salesforce Healthcare APIs

External systems can create, read, search, update data, or trigger processes in the Health Cloud using these FHIR APIs.

## Clinical Diagnostics API

### Create a document reference

Make a POST request to the new `/DocumentReference` resource.

### Get document references

Make a GET request to the new `/DocumentReference` resource. Required request parameters: date and patient.

### Get document reference details

Make a GET request to the new `/DocumentReference` resource. Required request parameter: id.

### Update document reference details

Make a PUT request to the new `/DocumentReference` resource. Required request parameter: id.

#### SEE ALSO:

[Salesforce Help: Salesforce Healthcare API](#)

[Salesforce Help: Salesforce Healthcare API](#)

## MuleSoft Direct Integrations with Health Cloud

MuleSoft Direct for Health Cloud offers comprehensive integration solutions tailored to fit the healthcare industry needs and use cases of businesses.

### Patient Summary - Blue Button 2.0 API

Use Patient Summary - Blue Button 2.0 integration APIs to help provider systems, such as Salesforce Health Cloud, connect to CMS Blue Button 2.0 API or any CARIN Blue Button compliant Patient Access API and fetch adjudicated claims data. The integration extracts clinical and administrative data from the data set and stores it in the Health Cloud clinical data model to form a longitudinal view of the patient. From the Spring '24 release onwards, the Patient Summary - Blue Button 2.0 integration application also extracts financial data like total adjudicated amount and out-of-pocket expenses and stores it in Data Cloud.

### Bulk Clinical Data Sync API

Use Bulk Clinical Data Sync APIs to get bulk healthcare data from an FHIR Bulk API-compliant EMR and transfer the clinical data to Salesforce Data Cloud. The solution enables organizations to scale their Population Health Management initiatives and make data-driven decisions in the healthcare domain using analytics.

### QHIN (Kno2) Integration API

Use QHIN (Kno2) Integration APIs to streamline the patient onboarding process by providing the ability to query a network of healthcare organizations using integration with Kno2. The query retrieves relevant patient demographics and clinical documentation. Subsequently, the integration ingests vital patient data into essential systems, including Salesforce Health Cloud and an organization's EHR.

#### SEE ALSO:

[Salesforce Help: MuleSoft Direct Integrations](#)

[Salesforce Help: MuleSoft Direct Integrations](#)

## Medication Review and Medication Management Enhancements and Updates

Medication Management helps your clinicians to perform a medication therapy review with a custom flow that meets your business needs. With the deprecation of the RxNorm Interaction API, Medication Management no longer supports the identification of potential drug-to-drug interactions.

### [Easily Set Up a Custom Flow for Medication Therapy Review](#)

Provide additional flexibility for your clinicians to perform comprehensive and targeted medication therapy reviews by using a custom flow instead of the built-in Start Medication Therapy Review flow. The Patient Medication Manager lightning component now includes the Medication Therapy Review Flow attribute, where you can select the custom flow as per your business needs.

### [RxNorm Interaction API is Deprecated](#)

Medication Management no longer supports the identification of drug interactions because the integrated RxNorm Interaction API, a web service for accessing drug-to-drug interaction information, is deprecated. As a result of this change, we've removed the Drug Interaction tab from the Patient Medication Manager component, and you can no longer see potential drug interactions when performing medication reconciliation or medication therapy review.

## Easily Set Up a Custom Flow for Medication Therapy Review

Provide additional flexibility for your clinicians to perform comprehensive and targeted medication therapy reviews by using a custom flow instead of the built-in Start Medication Therapy Review flow. The Patient Medication Manager lightning component now includes the Medication Therapy Review Flow attribute, where you can select the custom flow as per your business needs.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions of Health Cloud where person accounts are enabled.

**Where:** This feature is available with the Health Cloud Medication Management add-on license.

**How:** Edit a person account's Lightning record page, and select the Patient Medication Manager component. In the Properties pane, from the Medication Therapy Review Flow list, select a compatible custom flow.

SEE ALSO:

[Salesforce Help: Set Up a Custom Flow for Medication Therapy Review](#)

[Salesforce Help: Medication Review and Medication Management](#)

## RxNorm Interaction API is Deprecated

Medication Management no longer supports the identification of drug interactions because the integrated RxNorm Interaction API, a web service for accessing drug-to-drug interaction information, is deprecated. As a result of this change, we've removed the Drug Interaction tab from the Patient Medication Manager component, and you can no longer see potential drug interactions when performing medication reconciliation or medication therapy review.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions of Health Cloud where the Health Cloud Medication Management add-on license and person accounts are enabled.

SEE ALSO:

[Salesforce Help: RxNorm Terms and Information](#)

[Salesforce Help: Medication Review and Medication Management](#)

## Provider Network Management Enhancements

Provider Network Management now also includes contract lifecycle management capabilities to help manage contracts efficiently.

### [Manage Provider Contracts with Provider Network Management](#)

Provider Network Management boosts its contract management capabilities by including limited access to Salesforce Contracts in the Health Cloud Provider Network Management Add-On license. With this change, your users can use features such as Contract Approval Workflow, Contract Version Management, E-Signature Integration, and so on to efficiently manage the end-to-end contract lifecycle.

### Manage Provider Contracts with Provider Network Management


Provider Network Management boosts its contract management capabilities by including limited access to Salesforce Contracts in the Health Cloud Provider Network Management Add-On license. With this change, your users can use features such as Contract Approval Workflow, Contract Version Management, E-Signature Integration, and so on to efficiently manage the end-to-end contract lifecycle.

**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.

**When:** These changes are available starting on February 13, 2024.

**Who:** This feature is available to users who have the Health Cloud Provider Network Management and CLM Runtime User permission sets.

**Why:** These enhancements enable users to manage the complete end-to-end lifecycle of contracts. A robust contract management system ensures that contracts have the right payment terms, providers are held accountable for care outcomes, and clinicians work towards qualitative, patient-centric care.

 **Note:** Health Cloud customers can only access the Contract Management part of Salesforce Contracts by default. To use Clause Management, Obligation Management, Microsoft Word 365 Editor, and other Salesforce Contracts features, you have to purchase Salesforce Contracts.

SEE ALSO:

[Salesforce Help: Provider Network Contract Management](#)

[Salesforce Help: Salesforce Contracts Overview](#)

## Provider Search Enhancements

Enhance the provider search experience by searching across more provider data, configuring the search results display, and customizing search result filters. Use up to 40 custom fields in provider searches.

### [Enrich the Provider Search Experience](#)

Match patients to providers by using a more flexible and customizable Provider Search tool. By using Provider Search with Criteria-Based Search and Filter, you can configure custom search criteria, search result filters, and the search result display. You can also customize search result actions. Users can search across a richer set of data and initiate a referral flow directly from search results.

### [Add More Custom Fields to Run Provider Searches](#)

Now you can use up to 40 custom fields in provider searches. With the increased limit, users can refine their searches and find suitable providers more easily.



## Enrich the Provider Search Experience

Match patients to providers by using a more flexible and customizable Provider Search tool. By using Provider Search with Criteria-Based Search and Filter, you can configure custom search criteria, search result filters, and the search result display. You can also customize search result actions. Users can search across a richer set of data and initiate a referral flow directly from search results.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions with Health Cloud.

**Who:** This feature is available to users with the Criteria-Based Search and Filter permission set and either the Health Cloud Provider Relationship Management or Health Cloud Provider Search permission set.

**How:** If you don't already use Provider Search, enable it. In Criteria-Based Search and Filter settings, create a search criteria configuration. Then add the Criteria-Based Search and Filter component to a Lightning page.

SEE ALSO:

[Salesforce Help: Help People Find Providers with Provider Search \(can be outdated or unavailable during release preview\)](#)

## Add More Custom Fields to Run Provider Searches

Now you can use up to 40 custom fields in provider searches. With the increased limit, users can refine their searches and find suitable providers more easily.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions with Health Cloud.

**Who:** This feature is available to users with the Data Pipelines Base User permission set.

**How:** Configure up to 40 active Care Provider Search Config mappings. Each mapping corresponds to a searchable parameter in Provider Search. You can create up to 130 mappings, and have up to 40 active mappings at a time. Previously, you were limited to 100 mappings, with up to 10 active mappings at a time.

SEE ALSO:

[Salesforce Help: Use Custom Fields to Run Provider Searches \(can be outdated or unavailable during release preview\)](#)

## Referral Management Enhancements

Modernize your referral process by creating a digital channel that guides guest users through creating a referral. Engage referred patients faster by coordinating care and completing assessments directly on clinical service requests. Gain insights into referral patterns, top referral resources, and provider performance by using the new Referral Management app.

### [Accept Referrals from Guest Users](#)

Reduce incoming fax volume and delays in patient care by modernizing your referral process with a branded digital experience for guest users. Create your own version of the Create Referral prebuilt OmniScript and customize it to guide guest users through creating a referral and uploading related documents. You can reduce spam and misuse by using reCAPTCHA verification.

### [Coordinate Care for Referred Patients](#)

Process referrals faster by completing many related tasks in one place. Schedule appointments, complete assessments, add care plans, enroll in care programs, and launch actions directly on a clinical service request.

### [Focus on Key Referral Metrics to Improve Efficiency](#)

Use the new Referral Management app to prioritize referral requests, analyze incoming and outgoing referrals, and assess your team's capacity to process referrals. The new Referral Analytics dashboards embedded in the app rely on data from clinical service requests, and are available as standalone components for other page layouts.

## Accept Referrals from Guest Users

Reduce incoming fax volume and delays in patient care by modernizing your referral process with a branded digital experience for guest users. Create your own version of the Create Referral prebuilt OmniScript and customize it to guide guest users through creating a referral and uploading related documents. You can reduce spam and misuse by using reCAPTCHA verification.

**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 and OmniStudio Admin permission set, the Customize Application permission, and the Create and Set Up Experiences and View Setup and Configuration permissions.

**How:** From Setup, in the Quick Find box, enter *Referral Management*, and then select **Referral Management Settings**. Then follow the guided setup instructions on the page to set up your Experience Cloud site, set up reCAPTCHA, and install and configure the Create Referral OmniScript to meet your requirements.

SEE ALSO:

[Salesforce Help: Provide a Secure Referral Form to Guest Users \(can be outdated or unavailable during release preview\)](#)

## Coordinate Care for Referred Patients

Process referrals faster by completing many related tasks in one place. Schedule appointments, complete assessments, add care plans, enroll in care programs, and launch actions directly on a clinical service request.

**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.

**How:** Add the relevant Lightning components to the clinical service request page layout using the Lightning App Builder:

- Healthcare Appointment Scheduler for scheduling appointments
- Assessment for completing assessments, for example intake and eligibility assessments
- FlexCard component that specifies the IndustriesHCCarePlanManager FlexCard for adding care plans
- Action Launcher for launching actions included in an Action Launcher deployment

In Object Manager, add related lists to the Clinical Service Request object:

- Service Appointments related list for scheduling appointments
- Assessments related list for viewing assessments
- Care Plans related list for viewing and adding care plans
- Care Program Enrollees related list for viewing and enrolling in care programs

SEE ALSO:

[Salesforce Help: Configure the Clinical Service Request Page for Referral Coordinators \(can be outdated or unavailable during release preview\)](#)

## Focus on Key Referral Metrics to Improve Efficiency

Use the new Referral Management app to prioritize referral requests, analyze incoming and outgoing referrals, and assess your team's capacity to process referrals. The new Referral Analytics dashboards embedded in the app rely on data from clinical service requests, and are available as standalone components for other page layouts.

**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. The Referral Management app dashboards are part of the Enhanced Analytics for Healthcare app and are available to users with the Healthcare Intelligence or CRM Analytics for Health Cloud add-on license. Users with the Healthcare Analytics Admin or Health Intelligence Admin permission set can create, edit, and delete the app. Users with the Healthcare Analytics User or Health Intelligence User permission set can view the app dashboards.

**How:** From Setup, in the Quick Find box, enter *Referral Management*, and then select **Referral Management Settings**. If you haven't already done so, set up CRM Analytics for Health Cloud. Then enable the Referral Management App.

For details about the new dashboards used in the Referral Management app, see [Manage Your Patient Referrals Better Using Referral Analytics](#).

SEE ALSO:

[Salesforce Help: Set Up the Referral Management App \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Track and Analyze Referrals with the Referral Management App \(can be outdated or unavailable during release preview\)](#)

## CRM Analytics Enhancements for Health Cloud

Get insights into referrals by using the new Referral Analytics dashboards included in the Enhanced Analytics for Healthcare app.

### [Manage Your Patient Referrals Better Using Referral Analytics](#)

Streamline your patient referral management with the new Referral Analytics dashboards for tracking and analyzing referral activities. Get complete visibility into incoming and outgoing referral statuses, referral age, and priority for improved resource planning. Healthcare resources can use the dashboard to assess referral process efficiency and streamline the process for enhancing patient care. Referral coordinators can use the dashboards to prioritize and focus on top referral cases that require attention and optimize their workflow.

## Manage Your Patient Referrals Better Using Referral Analytics

Streamline your patient referral management with the new Referral Analytics dashboards for tracking and analyzing referral activities. Get complete visibility into incoming and outgoing referral statuses, referral age, and priority for improved resource planning. Healthcare resources can use the dashboard to assess referral process efficiency and streamline the process for enhancing patient care. Referral coordinators can use the dashboards to prioritize and focus on top referral cases that require attention and optimize their workflow.

**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:** These dashboards are part of the Enhanced Analytics for Healthcare app and are available to users with the Healthcare Intelligence or CRM Analytics for Health Cloud add-on license. Users with the Healthcare Analytics Admin or Health Intelligence Admin permission set can create, edit, and delete the app. Users with the Healthcare Analytics User or Health Intelligence User permission set can view the app dashboards.

**How:** From Setup, in the Quick Find box, enter *Health Cloud CRM Analytics Settings*, and then select **Enhanced Analytics for Healthcare**. Follow the instructions on the page to set up an Enhanced Analytics for Healthcare app.

For details about the new Referral Management app that uses these dashboards, see [Focus on Key Referral Metrics to Improve Efficiency](#).

SEE ALSO:

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

## 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.

### Advanced Therapy Management

#### Represent the relationship between service territories where an advanced therapy is performed

Use the new `WorkTypeServiceTerritory` and `RelatedWorkTypeServiceTerritory` fields in the `WorkTypeStepLdTimeOvride` object.

### Assessments

#### Track the status of an assessment saved as a draft

Use the new `InProgress` picklist value in the `Status` field in the `AssessmentEnvelopeItem` object.

#### Store the score of an assessment question response value

Use the new `ResponseValueScore` field in the `AssessmentQuestionResponse` object.

#### Represent information about external assessments

Use the new `ExternalAssessmentDefinition` object.

#### Represent information about suggested assessments

Use the new `SuggestedAssessmentDef` object.

#### Represent the reasons for a suggested assessment

Use the new `SuggestedAssessmentReason` object.

### Care Program Management

#### Associate a care program enrollee with a clinical service request

Use the new `ClinicalServiceRequestId` field in the `CareProgramEnrollee` object.

### Electronic Signatures

#### Store information about the verification of a related record

Use the new `DigitalVerification` object.

#### Store information about a digital verification setup, such as the number of signatures needed and the record action that's related to the verification

Use the new `DigitalVerificationSetup` object.

#### Store contextual details of a digital verification setup, such as the user who does the verification, and the messages that display at the time of verification

Use the new `DigitalVerfSetupDetail` object.

### Home Health

#### Represent a broadcast of appointments that's sent to resources of specific service territories

Use the new `ScheduleBroadcast` object.

#### Represent service territories to which a schedule broadcast is sent

Use the new `ScheduleBroadcastTerritory` object.

**Represent appointments that schedulers broadcast to resources using a schedule broadcast**

Use the new `ScheduleBroadcastAppointment` object.

**Represent a junction between a Schedule Broadcast Appointment and a Service Resource**

Use the new `ScheduleBrdcstApptResource` object.

**Specify the ID of a related care service visit that's associated with a care service visit**

Use the new `RelatedVisitId` field in the `CareServiceVisit` object.

**Specify the type of related visit that's associated with the care service visit**

Use the new `RelatedVisitType` field in the `CareServiceVisit` object.

## SEE ALSO:

[Salesforce Health Cloud Developer Guide: Advanced Therapy Management](#)

[Salesforce Health Cloud Developer Guide: Health Assessments](#)

[Salesforce Health Cloud Developer Guide: Care Program Management](#)

[Salesforce Health Cloud Developer Guide: Home Health](#)

## Create Custom Report Types for More Objects

Gain better visibility into Health Cloud data and make informed decisions by creating report types for more objects.

**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.

**How:** Create a custom report type for any of these objects.

- `CareBarrier`
- `CareBarrierDeterminant`
- `CareBarrierType`
- `CareBenefitVerifyRequest`
- `CareDeterminant`
- `CareDeterminantType`
- `CareInterventionType`
- `CareLimitType`
- `CareProviderSearchableField`
- `CoverageBenefitItemLimit`
- `ProviderSearchSyncLog`
- `ReceivedDocumentType`

## SEE ALSO:

[Salesforce Help: Create a Custom Report Type](#)

## New and Changed Invocable Actions in Health Cloud

Use the new and changed invocable actions for Health Cloud.

**Create a visit record for each patient home visit and bundle them into a group visit**

Use the new `scheduleGroupVisits` action.

**Reschedule a set of subsequent recurring home healthcare visits**

Use the new `rescheduleRecurringHomeVisits` action.

**Create a set of dependent recurring home healthcare visits**

Use the new `firstCareResourceSkillsIdsList`, `secondCareResourceSkillsIdsList`, `careResourceCount`, and `workTypeIdsList` input fields on the existing `scheduleRecurringHomeVisit` action.

## New Connect REST API Resources in Health Cloud

Connect REST APIs help customers, partners, and ISVs integrate with Salesforce software and UIs.

### New Connect APIs

**Get a list of work types and their associated lead times that are optimized across regions for a specific advanced therapy**

Make a POST request to the new `/connect/health/advanced-therapy-management/worktype-leadtime` resource.

New request body: Work Type Lead Time Input

New response body: Work Type Lead Time Output

**Create service appointments for a care program enrollee in advanced therapy management based on the provided appointment slots**

Make a POST request to the new `/connect/health/advanced-therapy-management/book-slot-chain` resource.

New request body: Book Slot Chain Input

New response body: Book Slot Chain Output

**Create a patient referral in a Salesforce org from an OOTB guest web form**

Make a POST request to the new `/connect/health/referral-management/guest-referrals` resource.

New request body: Guest Referral Input

New response body: Guest Referral Output

**Perform verification for the digital verification records**

Make a POST request to the new `/connect/health/advanced-therapy-management/digital-verification` resource.

New request body: Digital Verification Input

New response body: Digital Verification Output

## SEE ALSO:

[Salesforce Health Cloud Developer Guide: Work Type Lead Time](#)

[Salesforce Health Cloud Developer Guide: Guest Referral](#)

[Salesforce Health Cloud Developer Guide: Book Slot Chain](#)

## Update Sharing Settings for the Operating Hours Object

Sharing is now enabled and sharing settings are available for Operating Hours. Admins of existing orgs with unauthenticated (guest) users must manually create the sharing rules according to their requirements. If their users access Operating Hours via Salesforce Scheduler, they must set the value of the `enableDepriveSoqlAccessGuestUserOrgPref` field for the IndustriesSettings Metadata API to `true`.

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

SEE ALSO:

[Other Changes to Salesforce Scheduler](#)

## 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 Spring '24 release in the [Insurance Spring '24 Release Notes](#).

## Loyalty Management

Leverage the capabilities of Global Promotions Management to bring your brand's promotion strategy to life within minutes. Offer games like Spin the Wheel and Scratchcard as program rewards to members. Focus on the most important aspects of your loyalty program on the refreshed Loyalty Program page. Use the new filter options in the Liability Forecast dashboard to get a more focused view of your loyalty program's liability.

### [Global Promotions Management](#)

Marketing managers can now easily create pricing and loyalty promotions using a simple guided flow. Use a combination of options to define the perfect eligibility criteria for your promotions. Add multiple diverse rules to each promotion with nine promotion templates. Offer multiple rewards as part of the same promotion and inform members about the promotion as soon as it's launched using Marketing Cloud journeys. Choose the type of limits that you want to add for your promotions.

### [Make Your Loyalty Program Engaging and Fun with Games](#)

Offer games like Spin the Wheel and Scratchcard as program rewards for your members. The games offer members a chance to win points, vouchers, entries in raffle contests, or custom rewards that your brand wants to offer the members. Program managers can decide the validity period of the games, the timeout duration for members, and the color, the branding image, and the win probability of each game reward. To ensure that the games don't cross the allocated budget, the program manager can set limits for each game reward.

### [Do More with the Refreshed Quick Promotion Guided Flow](#)

Marketing managers can now use the Quick Promotion guided flow to select a more granular promotion eligibility criteria, to get a head start on their promotion configuration with the Accrual Events template, and to design the promotion launch email.

### [Increase Your Efficiency with a Simplified Loyalty Program Page](#)

We've redesigned the Loyalty Program page to make it super easy for you to find what you are looking for. From the Promotions component, view your recent promotions, create quick promotions, and go out to the Promotion Console app.

### [Optimize Your Liability Forecast with Multivariate Forecasting](#)

In the Liability Forecast dashboard, loyalty program managers can use the multi-select picklist to comprehensively analyze program liability based on voucher liability and various non-qualifying points (NQP) such as accrued, redeemed, and expired points. Enhance accuracy in liability prediction and offer flexibility to customize the analysis based on relevant decision factors.

### [Reward Members for Scanning Receipts](#)

Drive member engagement and enhance member experience by integrating Loyalty Management with a receipt scanning app that uses optical character recognition to read and interpret receipts. Members can upload receipts of the products purchased at third-party stores, and get rewards for eligible purchases. They can use their iOS or Android mobile app to upload their purchase receipts and get rewarded. Use data from these receipts to track member behavior and analyze purchasing patterns to design effective promotions for your brand.

### [Improve Dining Experience With Loyalty Management Restaurant POS](#)

Integrate Loyalty Management with a Restaurant Point of Sale (POS) system through MuleSoft, and give your members a personalized and seamless dining experience. Make API requests to Salesforce from the POS system to get member details, view and redeem assigned vouchers, and create accrual orders after the member pays the restaurant bill.

### [New and Changed Objects in Loyalty Management](#)

Do more with the new and updated Loyalty Management objects.

### [New Metadata Types in Loyalty Management](#)

Make the most of the new types in Loyalty Management.

### [New and Changed Connect REST APIs](#)

Here's a list of new and changed connect APIs.

### [Gamification Mobile SDK](#)

Integrate games and game rewards into a mobile app for enhanced brand engagement using the new Gamification Mobile SDK for Android and iOS.

## New and Enhanced Common Features for Industries

Loyalty Management includes access to some features that are available across clouds and products in Industries. Use these features to extend and customize Loyalty Management based on your business needs.

- [Action Launcher](#) on page 469  
Admins can customize the name of the Action Launcher component for service reps.
- [Actionable Segmentation](#) on page 470  
Admins can use their loyalty program-specific Data Processing Engine definitions to create actionable list definitions.
- [Data Processing Engine](#) on page 485  
Admins can use information stored in Data Cloud as data sources and write back results to Data Cloud objects.
- [Timeline](#) on page 498  
Admins can now show engagement events from a specific data space to service reps.

## Global Promotions Management

Marketing managers can now easily create pricing and loyalty promotions using a simple guided flow. Use a combination of options to define the perfect eligibility criteria for your promotions. Add multiple diverse rules to each promotion with nine promotion templates. Offer multiple rewards as part of the same promotion and inform members about the promotion as soon as it's launched using Marketing Cloud journeys. Choose the type of limits that you want to add for your promotions.



### [Offer Members Real-Time Discounts on Their Purchases](#)

Global Promotions Management comes with promotion templates that help marketing managers offer discounts to members on their carts or on their cart items. The Get Eligible Promotion business API powers your brand to show members the promotions that are eligible for their cart during checkout.

### [Pick from a Diverse Set of Options to Define a Promotion's Eligibility Criteria](#)

Marketing managers can choose the eligibility criteria of a promotion from a wide variety of options provided by Global Promotions Management. They can choose a combination of eligibility categories or pick one.

### [Get a Jump-Start on Adding Promotion Rules with Promotion Templates](#)

Instead of spending time on creating one promotion rule at a time, use promotion templates to build multiple rules for a promotion. The templates are intuitive with simple configuration choices and are adaptable to all your business scenarios. Select what customers have to do to be eligible and complement it with what eligible customers get. You get eight pricing templates and a template that's built for your loyalty program's member accrual events.

### [Offer Wide-Ranging Rewards to Members](#)

Offer a diverse range of exciting rewards as part of each promotion rule to attract members towards your brand. Offer points, vouchers, badges, and games to the members along with the discounts on their purchases. Points and vouchers help drive future sales, and badges and games help you to keep members engaged with the brand.

### [Put a Cap on the Brand's Promotion Spend](#)

Enforce limits to ensure that your promotions stay within the approved budget. Limits also help secure your brand against malicious activities. You can set limits at two levels. The first limit is on the promotion and the second limit is on the members.

### [Notify Members About Promotions Through Personalized Emails](#)

When marketing managers create a promotion, they can design the promotion's marketing email as well. Customize the email's design based on the brand's styling and personalize the content to include the details of the members, and the promotion's offers. After the promotion is activated, a Marketing Cloud journey automatically sends the email to the customers who are eligible for the promotion.

### [Manage All Aspects of Your Promotions from a Single App](#)

On the brand new Promotion Console app, you can create promotions, manage your promotion rewards, view the promotion calendar to find promotion whitespaces, and track the performance of your promotions. If you want to create promotions outside your loyalty program to target customers who aren't loyalty program members, create the promotions from the Promotion Console app.

### [Analyze Promotion Impact with Global Promotions Management Analytics](#)

Get comprehensive insights into your promotions and their effectiveness based on revenue impact and member engagement. Use the Global Promotions Management Analytics dashboards to identify top revenue-generating promotions, track member engagement, and analyze product performance.

## Offer Members Real-Time Discounts on Their Purchases

Global Promotions Management comes with promotion templates that help marketing managers offer discounts to members on their carts or on their cart items. The Get Eligible Promotion business API powers your brand to show members the promotions that are eligible for their cart during checkout.

**Where:** This change applies to Lightning Experience in Developer, Enterprise, Performance, and Unlimited editions where Loyalty Management is available.

**Why:** After a member completes their purchase, the updated Transaction Journal Execution business API automatically applies the selected promotion's rewards for the member's transaction. Along with cart and cart item discounts, marketing managers can also offer members loyalty rewards like points, vouchers, badges, and games.

**How:** From Setup, in the Quick Find box, enter *Global Promotions Management Settings*, and then select **Global Promotions Management Settings**. Turn on Global Promotions Management.

## Pick from a Diverse Set of Options to Define a Promotion's Eligibility Criteria

Marketing managers can choose the eligibility criteria of a promotion from a wide variety of options provided by Global Promotions Management. They can choose a combination of eligibility categories or pick one.

**Where:** This change applies to Lightning Experience in Developer, Enterprise, Performance, and Unlimited editions where Loyalty Management is available and Global Promotions Management is enabled.

**Why:** Base the promotion's eligibility criteria on the products purchased, purchase channel, member milestone, and member segmentation. A simple eligibility criteria can be that a promotion is only eligible for purchases made from a specific social media platform. A complex criteria can be that a specific product must be purchased from a particular store by a member who belongs to a loyalty program's highest tier on their birthday.

**How:** From the Promotions component of a loyalty program, click **New Quick Promotion**. On the Define Promotion Eligibility step of the Quick Promotions guided flow, select your promotion's eligibility criteria.

**Define Promotion Eligibility** > View Summary

Design and launch your promotion within minutes.

- Enter Primary Information
- Define Promotion Eligibility**
- Select Promotion Template
- Configure Promotion Template
- Add Promotion Limits
- Design Distribution Assets
- Review And Activate Promotion

Is the promotion for specific products or categories? No

Is the promotion for specific sales channels? No

Is the promotion for specific customers? No

Is the promotion for specific events? Yes

\*Event: Customer's Birthday      \*Event Period: Birthday Week

Do you want members to enroll for the promotion? No

## Get a Jump-Start on Adding Promotion Rules with Promotion Templates

Instead of spending time on creating one promotion rule at a time, use promotion templates to build multiple rules for a promotion. The templates are intuitive with simple configuration choices and are adaptable to all your business scenarios. Select what customers have to do to be eligible and complement it with what eligible customers get. You get eight pricing templates and a template that's built for your loyalty program's member accrual events.

**Where:** This change applies to Lightning Experience in Developer, Enterprise, Performance, and Unlimited editions where Loyalty Management is available and Global Promotions Management is enabled.

**How:** From the Promotions component of a loyalty program, click **New Quick Promotion**. On the Select Promotion Template step of the Quick Promotions guided flow, choose the templates that you want to use to create the promotion's rules.

The screenshot displays a selection screen for promotion templates, organized into five categories:

- Cart Promotions:**
  - Buy X, Get Discount + Rewards (Icon: Shopping cart with gift)
  - Spend X, Get Discount + Rewards (Icon: Shopping cart)
- Line Level Promotions:**
  - Buy X, Get Discount on Y + Rewards (Icon: Receipt with gift)
  - Spend X, Get Discount on Y + Rewards (Icon: Receipt)
- Unit Price Promotions:**
  - Buy X, Get Unit Price Discount on Y + Rewards (Icon: Price tag with gift)
  - Spend X, Get Unit Price Discount on Y + Rewards (Icon: Price tag)
- Combo Promotions:**
  - Buy X, Get Discounted Combo + Rewards (Icon: Shopping cart with arrows)
  - Spend X, Get Discounted Combo + Rewards (Icon: Shopping cart)
- Loyalty Promotions:**
  - Accrual Events (Icon: Calendar with gift)

A light blue informational banner at the bottom of the Loyalty Promotions section reads: "If you use a Loyalty Promotion template, you can't use any other templates in the promotion and you can't add promotion limits."

## Offer Wide-Ranging Rewards to Members

Offer a diverse range of exciting rewards as part of each promotion rule to attract members towards your brand. Offer points, vouchers, badges, and games to the members along with the discounts on their purchases. Points and vouchers help drive future sales, and badges and games help you to keep members engaged with the brand.

**Where:** This change applies to Lightning Experience in Developer, Enterprise, Performance, and Unlimited editions where Loyalty Management is available and Global Promotions Management is enabled.

**How:** From the Promotions component of a loyalty program, click **New Quick Promotion**. On the Configure Promotion Template step of the Quick Promotions guided flow, click **Add Another Reward** to choose additional rewards.

## Put a Cap on the Brand's Promotion Spend

Enforce limits to ensure that your promotions stay within the approved budget. Limits also help secure your brand against malicious activities. You can set limits at two levels. The first limit is on the promotion and the second limit is on the members.

**Where:** This change applies to Lightning Experience in Developer, Enterprise, Performance, and Unlimited editions where Loyalty Management is available and Global Promotions Management is enabled.

**How:** From the Promotions component of a loyalty program, click **New Quick Promotion**. On the Add Promotion Limits step of the Quick Promotions guided flow, you can select a mix of:

- Limits on the number of vouchers issued, number of points credited, and liability incurred by the promotion, and the number of times that members can use the promotion.
- Limits on the number of vouchers issued, number of points credited, and liability incurred for each member, and the number of times that the promotion can be used for each cart and line item.

Are there limits on the overall promotion?  Yes

\* Limit Type and Value

Vouchers 2,500

\* Limit Type and Value

Use per Customer 3

+ Add Limit Type

Are there limits on the promotion for a customer?  Yes

\* Limit Type and Value

Per Cart 2

+ Add Limit Type

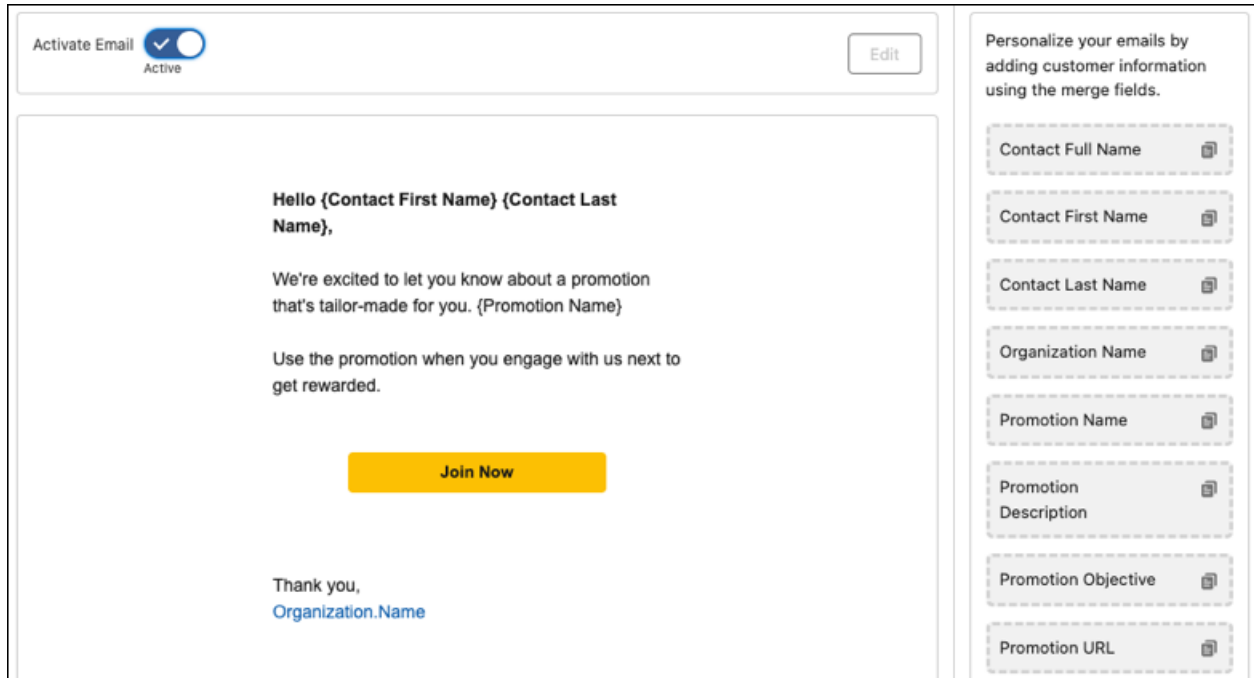
## Notify Members About Promotions Through Personalized Emails

When marketing managers create a promotion, they can design the promotion's marketing email as well. Customize the email's design based on the brand's styling and personalize the content to include the details of the members, and the promotion's offers. After the promotion is activated, a Marketing Cloud journey automatically sends the email to the customers who are eligible for the promotion.

**Where:** This change applies to Lightning Experience in Developer, Enterprise, Performance, and Unlimited editions where Loyalty Management and Marketing Cloud Connect are available, and Global Promotions Management is enabled.

**How:** From the Promotions component of a loyalty program, click **New Quick Promotion**. On the Design Distribution Assets step of the Quick Promotions guided flow, customize the promotion's email. To automatically send the launch email to members, the admin must connect Global Promotions Management with the brand's Marketing Cloud business unit.

After the promotion is activated, a journey is automatically created in the connected Marketing Cloud business unit to send the promotion launch email.



## Manage All Aspects of Your Promotions from a Single App

On the brand new Promotion Console app, you can create promotions, manage your promotion rewards, view the promotion calendar to find promotion whitespaces, and track the performance of your promotions. If you want to create promotions outside your loyalty program to target customers who aren't loyalty program members, create the promotions from the Promotion Console app.

**Where:** This change applies to Lightning Experience in Developer, Enterprise, Performance, and Unlimited editions where Loyalty Management is available and Global Promotions Management is enabled.

**How:** From the App Launcher, find and select **Promotion Console**.

## Analyze Promotion Impact with Global Promotions Management Analytics

Get comprehensive insights into your promotions and their effectiveness based on revenue impact and member engagement. Use the Global Promotions Management Analytics dashboards to identify top revenue-generating promotions, track member engagement, and analyze product performance.

**Where:** This change applies to Lightning Experience and all versions of the Salesforce app in Enterprise and Unlimited editions where Loyalty Cloud is enabled.

**Who:** These dashboards are part of the Global Promotions Management Analytics app. To configure the Global Promotions Management Analytics app, you need the CRM Analytics Plus Admin and Loyalty Analytics Admin permission sets. To use the Global Promotions Management Analytics app, you need the CRM Analytics Plus User and Loyalty Analytics User permission sets.

**How:** From Setup, in the Quick Find box, enter *Global Promotions Management Analytics*, and then select **Global Promotions Management Analytics**. Follow the instructions on the page to set up the Global Promotions Management Analytics app.

## Make Your Loyalty Program Engaging and Fun with Games

Offer games like Spin the Wheel and Scratchcard as program rewards for your members. The games offer members a chance to win points, vouchers, entries in raffle contests, or custom rewards that your brand wants to offer the members. Program managers can decide the validity period of the games, the timeout duration for members, and the color, the branding image, and the win probability of each game reward. To ensure that the games don't cross the allocated budget, the program manager can set limits for each game reward.

**Where:** This change applies to Lightning Experience in Developer, Enterprise, Performance, and Unlimited editions where Loyalty Management is available.

**How:** To add a game, from the App Launcher, find and select **Game Definitions**. On the list view, click **New**. Define a game and save your changes. To add a reward for a game, from the App Launcher, find and select **Game Rewards**. On the list view, click **New**. Select the game, choose the type of reward that you want to offer, and save your changes.

SEE ALSO:

[Salesforce Help: Offer Games to Members \(can be outdated or unavailable during release preview\)](#)

## Do More with the Refreshed Quick Promotion Guided Flow

Marketing managers can now use the Quick Promotion guided flow to select a more granular promotion eligibility criteria, to get a head start on their promotion configuration with the Accrual Events template, and to design the promotion launch email.

**Where:** This change applies to Lightning Experience in Developer, Enterprise, Performance, and Unlimited editions where Loyalty Management is available.

## Increase Your Efficiency with a Simplified Loyalty Program Page

We've redesigned the Loyalty Program page to make it super easy for you to find what you are looking for. From the Promotions component, view your recent promotions, create quick promotions, and go out to the Promotion Console app.

**Where:** This change applies to Lightning Experience in Developer, Enterprise, Performance, and Unlimited editions where Loyalty Management is available.

The screenshot displays the Salesforce Loyalty Program interface. At the top, the page title is "Loyalty Program Cloud Kicks Inner Circle" with an "Edit" button. Below this is a table with columns for Status, Description, and Type, showing one active loyalty program. The main navigation bar includes tabs for Setup, Details, Members And Partners, Experiences (selected), Processes, and Transactions. Under the Experiences tab, there are four sections: Promotions (0) with "New" and "New Quick Promotion" buttons; Voucher Definitions (0) with a "New" button; Loyalty Program Badges (0) with a "New" button; and Benefit Types (0) with a "New" button. On the right side, there is a "Promotions" section with a "New Quick Promotion" button and a "Promotion Console" card. The card features a cartoon bear holding a magnifying glass over a circular menu of icons, and text that reads: "Design and run targeted promotions to drive customer engagement and revenue lift. You can manage your promotions in the Promotion Console." Below the card is a "Go to Promotion Console" link.

## Optimize Your Liability Forecast with Multivariate Forecasting

In the Liability Forecast dashboard, loyalty program managers can use the multi-select picklist to comprehensively analyze program liability based on voucher liability and various non-qualifying points (NQP) such as accrued, redeemed, and expired points. Enhance accuracy in liability prediction and offer flexibility to customize the analysis based on relevant decision factors.

**Where:** This change applies to CRM Analytics in Lightning Experience Enterprise, Unlimited, and Developer editions where Loyalty Management is enabled.

**Who:** To use liability forecasting, you need either the Loyalty Analytics Plus add-on license or the CLAAalytics Base App license.

**How:** From CRM Analytics Studio, click **Create**, and then select **App**. Find and select the **Analytics for Loyalty** app template and follow the instructions in the guided flow to create your app.

## Reward Members for Scanning Receipts

Drive member engagement and enhance member experience by integrating Loyalty Management with a receipt scanning app that uses optical character recognition to read and interpret receipts. Members can upload receipts of the products purchased at third-party stores, and get rewards for eligible purchases. They can use their iOS or Android mobile app to upload their purchase receipts and get rewarded. Use data from these receipts to track member behavior and analyze purchasing patterns to design effective promotions for your brand.

**Where:** This change applies to Lightning Experience where Loyalty Management is enabled.

**How:** Set up the Loyalty Management Receipt Scanner Kit unlocked package, which includes integration with Amazon Textract AnalyzeExpense, to read and interpret receipts. Developers can clone our GitHub repositories to get the latest iOS or Android version of Loyalty Management Mobile SDK.

SEE ALSO:

[Loyalty Management Developer Guide: Receipt Scanning with Loyalty Management Mobile SDK \(can be outdated or unavailable during release preview\)](#)

## Improve Dining Experience With Loyalty Management Restaurant POS

Integrate Loyalty Management with a Restaurant Point of Sale (POS) system through MuleSoft, and give your members a personalized and seamless dining experience. Make API requests to Salesforce from the POS system to get member details, view and redeem assigned vouchers, and create accrual orders after the member pays the restaurant bill.

**Where:** This change applies to Lightning Experience where Loyalty Management is enabled.

**When:** This feature is available later in Spring '24.

**How:** To integrate Loyalty Management with a Restaurant POS system by using MuleSoft, set up the unlocked package. Enable access to industry integrations, create a client application and an AnyPoint MQ, and enable the integration app.

SEE ALSO:

[Salesforce Developer Documentation: Set Up Integration With Restaurant POS APIs \(can be outdated or unavailable during release preview\)](#)

[Salesforce Developer Documentation: Loyalty Management POS API Powered by MuleSoft \(can be outdated or unavailable during release preview\)](#)

## New and Changed Objects in Loyalty Management

Do more with the new and updated Loyalty Management objects.

### **Review the details of a promotion rule template**

Use the new `PromotionRuleTemplate` object.

### **Select a promotion's eligible channel**

Use the new `PromotionChannel` object.

### **Select a promotion's eligible product**

Use the new `PromotionProduct` object.

### **Select a promotion's eligible product category**

Use the new `PromotionProductCategory` object.

### **Specify the limits of a promotion**

Use the new `PromotionLimit` object.

### **Update a customer's usage of a promotion**

Use the new `PromotionPartyUsage` object.

### **Track the discount provided by a promotion to a customer**

Use the new `PromotionPartyUsageDetail` object.

### **Update the usage of a promotion limit**

Use the new `PromotionLimitUsage` object.

### **Connect Global Promotions Management with multiple Marketing Cloud business units**

Use the new `BusinessUsage`, `EmailConfiguration`, and `OrganizationIdentifier` fields of the `InternalOrganizationUnit` object.

### **Associate a promotion with a Marketing Cloud business unit**

Use the new `BusinessUnitId` field of the `Promotion` object.

### **View the start and end date time of a promotion that a member is eligible for**

Use the new `StartDateTime` and `EndDateTime` fields of the `LoyaltyPgmMbrPromEligView` object.

### **Create a game that you want to offer to members as a reward**

Use the new `GameDefinition` object.

### **Select the reward of a game**

Use the new `GameReward` object.

### **Assign games to members**

Use the new `GameParticipant` object.

### **Reward members after they play a game**

Use the new `GameParticipantReward` object.

### **Associate a game with a promotion**

Use the new `GameDefinitionId` field of the `Promotion` object.

### **Add the time when a promotion starts and ends**

Use the new `EndDateTime` and `StartDateTime` fields of the `Promotion` object.

### **Provide a marketing name, priority number, and unique code for promotions**

Use the new `DisplayName`, `PriorityNumber`, and `PromotionCode` fields of the `Promotion` object.

### **Associate a product catalog with a promotion**

Use the new `ProductCatalogId` field of the `Promotion` object.



## New Metadata Types in Loyalty Management

Make the most of the new types in Loyalty Management.

### Settings

#### Turn on Global Promotions Management

Use the `enableUnifiedPromotions` field on the new `IndustriesUnifiedPromotionsSettings` metadata type.

#### Offer games to a member as a program reward

Use the new `enableGamification` field on the `IndustriesGamificationSettings` metadata type.

## New and Changed Connect REST APIs

Here's a list of new and changed connect APIs.

### [New Connect REST API Resources in Loyalty Management](#)

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.

## New Connect REST API Resources in Loyalty Management

Connect REST APIs help customers, partners, and ISVs integrate with Salesforce software and UIs.

### New Connect APIs

#### Create a promotion based on the provided promotion limits and eligibility conditions

Make a POST request to the new `/global-promotions-management/promotions` resource.

New request body: Unified Promotions Input

New response body: Unified Promotions Output

#### Get a list of eligible, expired, and played games for a loyalty program member, an account, or a contact

Make a GET request to the new `/game/participant/{participantId}/games` resource.

New response body: Games List

#### Get eligible promotions, and their associated rewards for a cart and its line items

Make a POST request to the new `/global-promotions-management/eligible-promotions` resource.

New response body: Eligible Promotions List

#### Get the details of a promotion

Make a GET request to the new `/global-promotions-management/promotions/{promotionId}` resource.

New response body: Unified Promotions Output

#### Get the details of the reward provided to a participant after the participant plays a game

Make a GET request to the new `/game/gameparticipantreward/{gameParticipantRewardId}/game-reward` resource.

New response body: Game Result

**Update the details of a promotion**

Make a PUT request to the new `/global-promotions-management/promotions/{promotionId}` resource.

New request body: Unified Promotions Input

New response body: Unified Promotions Output

## SEE ALSO:

[Loyalty Management Developer Guide: Gamification APIs](#)(can be outdated or unavailable during release preview)

[Loyalty Management Developer Guide: Promotion APIs](#)(can be outdated or unavailable during release preview)

**Changed Connect REST API Response Bodies**

These response bodies have changes.

**Transaction Journal Process Result**

This response body has two new fields:

`badgesAssigned`—The list of badges assigned to a loyalty program member.

`gamesAssigned`—The list of games assigned to a loyalty program member.

## SEE ALSO:

[Loyalty Management Developer Guide: Transaction Journal Process Result](#) (can be outdated or unavailable during release preview)

**Gamification Mobile SDK**

Integrate games and game rewards into a mobile app for enhanced brand engagement using the new Gamification Mobile SDK for Android and iOS.

You can now extend the sample `MyNTOrewards` app to include games a loyalty member can play to win rewards. Or, build a custom mobile app and include the gamification feature using the Gamification Mobile SDK for Android and iOS. Gamification Mobile SDK works on iOS 15.0+ and Android 8.0+ versions.

**EDITIONS**

Available in: all editions that have Loyalty Management enabled

**Manufacturing Cloud**

Quickly compare metrics across different schedules in sales agreements and experience greater ease in managing your data. Closely monitor your inventory stock and movement by using the new inventory management objects. Set up a search experience to manage and plan your inventory. Efficiently import program and variant forecasts from CSV files to generate component production forecasts.

[Manage Sales Agreement Data Easily and Swiftly](#)

Reduce the friction in managing data and improve your productivity by using the usability, accessibility, and performance enhancements in the enhanced view for sales agreements. Effortlessly track and compare the metrics for products across various schedules with minimum scrolls and prevent errors in data entry. Get around sales agreement cells faster and edit values easily using your keyboard.

### [Build a Product Portfolio That Best Reflects Your Company's Offerings](#)

Catalog administrators and product designers can craft your company's product portfolio with unmatched speed and ease using Product Catalog Management features in Manufacturing Cloud. Design and organize the products in your portfolio to increase product findability and drive personalized, intelligent sales negotiations. Define an expansive, hierarchical product taxonomy by using product attributes and classifications. Use an intuitive interface to organize your products by using catalogs and catalog categories.

### [Inventory Visibility Foundations for Manufacturing Cloud](#)

Elevate the traceability of your product and part inventory and plan for inventory transfers and requests. Track granular information about the entire journey of the inventory—from inventory stocks at various locations to inventory transfers, returns, and shipments. Transform your inventory monitoring and management processes by configuring an inventory search experience.

### [Quickly Import Production Forecasts from CSV Files](#)

Suppliers can efficiently import program and variant forecast data from manufacturers and external research sources to derive component production forecasts. Program managers at suppliers can upload a CSV file with the forecast data, select the target object, and easily map the object's fields with the CSV column headers. With a few clicks, they can insert, update, or upsert large datasets and validate their data.

### [Fleet Management Enhancements](#)

Track the operations of your fleets of assets, such as mobile equipment, fixed systems, and power tools, with Manufacturing Cloud. Experience Cloud users can now track fleets, fleet assets, and fleet participants. Also, you can now enable Fleet Management from the application in Setup. Previously, you could only enable it using Metadata API.

### [Watch Manufacturing Cloud Videos](#)

New videos help your users learn about the capabilities of Program Based Business in Manufacturing Cloud.

## New and Enhanced Common Features for Industries

Manufacturing Cloud includes access to some features that are available across clouds and products in Industries. Use these features to extend and customize Manufacturing Cloud as per your business needs.

- [Action Launcher](#)

Customer service representatives can quickly resolve customer requests by launching button- and link-based actions and the service processes associated with service catalogs. Admins can now customize the title shown on the Action Launcher component. If out-of-the-box deployments are available, admins can use them right away to configure Action Launcher.

- [Actionable Segmentation](#)

Use predefined Data Processing Engine definitions to create actionable list definitions easily and quickly. To help list creators easily filter dataset records to add to their actionable lists, set the filter input format for the applicable dataset columns as Multi-Select Picklist. List creators can now use filter templates to save the time and effort required to filter dataset records.

- [Batch Management](#)

Select records from big objects to run batch jobs in Batch Management.

- [Business Rules Engine](#)

Build business processes, such as warranty claim adjudication processes, with scalable, extensible rules by using Business Rules Engine. Call executable expression set templates from flows. Create precise rules with the operators and functions that consider null values. Use the enhancements in decision tables to simplify and streamline lookups. Show your users more targeted and nuanced explanations for expression set version step results with the enhancements in Decision Explainer.

- [Context Service](#)

Simplify the retrieval and usage of data in your warranty claim adjudication processes by using Context Service. Extend the standard context definitions that are shipped with Manufacturing Cloud to create custom definitions that suit your business requirements. To upgrade the standard definition components that are used in the extended custom definitions, effortlessly sync the custom definitions.

- [Data Processing Engine](#)

Streamline your forecast calculations by using Data Processing Engine. Enjoy more Data Cloud flexibility in your definitions with more object types to choose from in data source and writeback nodes. Choose Data Cloud Data Spaces for your definition. Troubleshoot quickly by restoring previous field selections in your data source when you encounter an issue with a reference node. Upload CSV file data and write it back to an entity in Salesforce.

- [List Builder for Data Cloud Segment](#)

List creators must select a data space before selecting a data segment. The actionable list preview shows the default columns of the associated object. An email notification is sent to the list creator when an actionable list reaches 50,000 member records.

- [Timeline](#)

Get an interactive, chronological view of customer and asset activities by using Timeline. Configure Timeline to show engagement events from a specific data space in Data Cloud.

## Manage Sales Agreement Data Easily and Swiftly

Reduce the friction in managing data and improve your productivity by using the usability, accessibility, and performance enhancements in the enhanced view for sales agreements. Effortlessly track and compare the metrics for products across various schedules with minimum scrolls and prevent errors in data entry. Get around sales agreement cells faster and edit values easily using your keyboard.

**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 Sales Agreements Psl permission set license.

**Why:** Elevate your productivity using these key enhancements in the enhanced view for sales agreements.

- The Product Name, Metric, and Total columns stay frozen while you scroll across various schedules in the agreement. You can see these columns while scrolling across schedules. This ensures that you don't lose context of the product and metrics and don't make data entry errors.
- The cells with the product names are merged so you can easily identify the metrics for each product.
- You can use keyboard commands to perform key actions quickly such as editing a cell, saving your changes, and redoing your changes.

SEE ALSO:

[Salesforce Help: View Sales Agreement Terms Data \(can be outdated or unavailable during release preview\)](#)

## Build a Product Portfolio That Best Reflects Your Company's Offerings

Catalog administrators and product designers can craft your company's product portfolio with unmatched speed and ease using Product Catalog Management features in Manufacturing Cloud. Design and organize the products in your portfolio to increase product findability and drive personalized, intelligent sales negotiations. Define an expansive, hierarchical product taxonomy by using product attributes and classifications. Use an intuitive interface to organize your products by using catalogs and catalog categories.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions with Manufacturing Cloud and Product Catalog Management.

## Inventory Visibility Foundations for Manufacturing Cloud

Elevate the traceability of your product and part inventory and plan for inventory transfers and requests. Track granular information about the entire journey of the inventory—from inventory stocks at various locations to inventory transfers, returns, and shipments. Transform your inventory monitoring and management processes by configuring an inventory search experience.

### [Get Visibility Into the Entire Lifecycle of Your Inventory](#)

Monitor your inventory stock and movement by using the new inventory management objects. Manage serialized products and track products at various inventory locations such as manufacturing plants, distributors, and suppliers. Track the demand and transfer of products, and describe the replenishment, adjustment, consumption, or transfer of products. Store information about returned, rejected, and repaired inventory units and track the products that are shipped or in transit. Monitor products that are required and consumed to complete work orders.

### [Design Your Own Search Experience to Manage Your Inventory](#)

Improve the traceability and management of your product and part inventory by using the Criteria-Based Search and Filter feature. Enable inventory managers, customer service reps, and service technicians to get near real-time visibility into inventory stock at various locations and better plan inventory transfers. Set up the search framework by configuring an object with the searchable inventory data, by defining the search criteria, and by configuring the types of actions that users can take on the search results.

SEE ALSO:

[Salesforce Help: Manage Product and Part Inventory in Manufacturing Cloud \(can be outdated or unavailable during release preview\)](#)

## Get Visibility Into the Entire Lifecycle of Your Inventory

Monitor your inventory stock and movement by using the new inventory management objects. Manage serialized products and track products at various inventory locations such as manufacturing plants, distributors, and suppliers. Track the demand and transfer of products, and describe the replenishment, adjustment, consumption, or transfer of products. Store information about returned, rejected, and repaired inventory units and track the products that are shipped or in transit. Monitor products that are required and consumed to complete work orders.

**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 Criteria-Based Search and Filter permission set license.

SEE ALSO:

[Salesforce Help: How Inventory Information is Represented in Manufacturing Cloud \(can be outdated or unavailable during release preview\)](#)

## Design Your Own Search Experience to Manage Your Inventory

Improve the traceability and management of your product and part inventory by using the Criteria-Based Search and Filter feature. Enable inventory managers, customer service reps, and service technicians to get near real-time visibility into inventory stock at various locations and better plan inventory transfers. Set up the search framework by configuring an object with the searchable inventory data, by defining the search criteria, and by configuring the types of actions that users can take on the search results.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions with Criteria-Based Search and Filter.

**Who:** This feature is available to users with the Criteria-Based Search and Filter permission set license.

**How:** Create a searchable object to consolidate inventory data that's spread across multiple objects and fields. Keep the data in the searchable object updated using a Data Processing Engine definition or any other data transfer mechanisms. Create a search criteria

configuration to select the fields to be queried for searches, the fields to be shown in the search results, and the fields to sort, group, and aggregate results by. Set up the list of actions that the users can take on the search results. Add the Criteria-Based Search and Filter component to the relevant page.

SEE ALSO:

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

## Quickly Import Production Forecasts from CSV Files

Suppliers can efficiently import program and variant forecast data from manufacturers and external research sources to derive component production forecasts. Program managers at suppliers can upload a CSV file with the forecast data, select the target object, and easily map the object's fields with the CSV column headers. With a few clicks, they can insert, update, or upsert large datasets and validate their data.

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

SEE ALSO:

[CSV Data Management for Industries \(can be outdated or unavailable during release preview\)](#)

## Fleet Management Enhancements

Track the operations of your fleets of assets, such as mobile equipment, fixed systems, and power tools, with Manufacturing Cloud. Experience Cloud users can now track fleets, fleet assets, and fleet participants. Also, you can now enable Fleet Management from the application in Setup. Previously, you could only enable it using Metadata API.

**Where:** These changes apply to Lightning Experience in Enterprise, Unlimited, and Developer editions with Manufacturing Cloud and Fleet Management.

## Watch Manufacturing Cloud Videos

New videos help your users learn about the capabilities of Program Based Business in Manufacturing Cloud.

- [Manage Your Manufacturing Programs](#) teaches you how program managers can use Program Based Business in Manufacturing Cloud to get visibility into manufacturing programs, manage program forecasts, and plan business opportunities.
- [Set Up Program-Based Business in Manufacturing Cloud](#) teaches you the key concepts of Program Based Business and shows how admins can set up the feature.

## 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](#)

## Net Zero Cloud

Make disclosure report filing easier by authoring reports directly in Microsoft 365 Word. Retrieve disclosure responses from the previous year by using clause library. Align with reporting requirements from organizations like CDP by categorizing emissions into individual greenhouse gases. Enhance emissions calculations from electricity usage for stationary assets by applying market-based or location-based emission factors or both.

### [Author Disclosure Reports in Microsoft 365 Word](#)

Support authoring disclosure reports directly in Microsoft 365 Word by using the Salesforce Disclosure and Compliance Hub for Microsoft 365 Word add-in. Access data within Salesforce while authoring disclosures. Apply external information by using the built-in clause library search to fill the report efficiently. You need a Microsoft 365 license to edit Word documents.

### [Categorize Emissions for Ground Travel Energy Use into Individual Greenhouse Gases](#)

Simplify emissions reporting by categorizing emissions into individual greenhouse gases, like CO<sub>2</sub>, CH<sub>4</sub>, and N<sub>2</sub>O, in the ground travel energy use record when using ground travel emissions factors.

### [Keep Better Track of Market-Based and Location-Based Electricity Emission Factors for Stationary Assets](#)

Store market-based and location-based electricity emissions factor data in independent records. This eliminates duplication of location-based emissions rate information for individual stationary assets when you calculate the emissions from electricity usage.

### [Make Setup Pages Accessible to Net Zero Cloud Admins](#)

Assign the Net Zero Cloud Admin permission set to a standard user to give them access to configuration pages in Setup. The permission set eliminates the need to coordinate with a Salesforce admin with the Net Zero Cloud Manager permission set. You can assign the Net Zero Cloud Admin permission set to manage reference data, configure fuel types, upload business metrics data to run What-if analyses on a regular basis, and access the Net Zero Cloud configuration pages.

### [Other Improvements to Inventory Automation](#)

Make annual emissions inventory management easier with the Net Zero Cloud Starter SKU. Enhance inventory calculations by associating footprints with different statuses in bulk. View the subsidiary carbon footprints aggregated into the inventory in the record's related list.

### [Other Improvements to Emissions Factors Management](#)

Easily select emissions factors on Net Zero Marketplace, and load and apply them in Net Zero Cloud. Improve usability by selectively updating or refreshing the emissions factors or locking the emissions factor records from being updated.

### [New and Changed Objects for Net Zero Cloud](#)

Do more with the new and changed Net Zero Cloud objects.

### [New Net Zero Cloud Metadata Type](#)

Make the most of the new metadata type of Net Zero Cloud.

### [New Invocable Action in Net Zero Cloud](#)

Use the new invocable action for Net Zero Cloud.

### [CRM Analytics for Net Zero Cloud](#)

Use the new Program Analysis dashboards to analyze the collective impact of various sustainability programs and to assess the effectiveness of programs, program initiatives, and initiative enrollments. The Climate Action and Audit dashboards are now accessible from the Net Zero Cloud app landing page, with advanced data analysis functionalities and improved capabilities.

## New and Enhanced Common Features for Industries

Net Zero Cloud includes access to some features that are available across clouds and products in Industries. Use these features to extend and customize Net Zero Cloud based on your business needs.

- [Data Processing Engine](#) on page 485

Net Zero Cloud provides preconfigured data processing engine templates that can process high-volume jobs, such as calculating emissions forecasts or calculating the building energy intensity for commercial buildings.

## Author Disclosure Reports in Microsoft 365 Word

Support authoring disclosure reports directly in Microsoft 365 Word by using the Salesforce Disclosure and Compliance Hub for Microsoft 365 Word add-in. Access data within Salesforce while authoring disclosures. Apply external information by using the built-in clause library search to fill the report efficiently. You need a Microsoft 365 license to edit Word documents.

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

**How:** Install the add-in from the Microsoft store. Then from Setup, select **Disclosure and Compliance Hub Settings**, and turn on Use Disclosure and Compliance Hub Plugin for Microsoft 365.

**Who:** To author disclosure reports directly in Microsoft 365 Word by using the Salesforce Disclosure and Compliance Hub for Microsoft 365 Word add-in, users need the Net Zero Cloud Growth license, the Disclosure and Compliance Hub add-on license, and an Office 365 E1 license.

SEE ALSO:

[Salesforce Help: Disclosure and Compliance Hub \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Generate Disclosures Using Disclosure and Compliance Hub \(can be outdated or unavailable during release preview\)](#)

## Categorize Emissions for Ground Travel Energy Use into Individual Greenhouse Gases

Simplify emissions reporting by categorizing emissions into individual greenhouse gases, like CO<sub>2</sub>, CH<sub>4</sub>, and N<sub>2</sub>O, in the ground travel energy use record when using ground travel emissions factors.

**Where:** This change applies to Lightning Experience in Professional, Enterprise, Unlimited, and Developer editions with the Net Zero Cloud Starter or Growth license.

**Why:** Reporting individual greenhouse gases aligns with requirements from reporting organizations like CDP.

Greenhouse Gas Emissions Results	
Scope 3 GHG Category ⓘ	Scope 3 Emissions (tCO <sub>2</sub> e)
Employee Commuting	8,000.0000
CO <sub>2</sub> Emissions (kg)	CH <sub>4</sub> Emissions (kg)
800.000000	2,400.000000
N <sub>2</sub> O Emissions (kg)	
1,600.000000	

SEE ALSO:

[Salesforce Help: Greenhouse Gas Emissions \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Create a Ground Travel Energy Use Record \(can be outdated or unavailable during release preview\)](#)

[Net Zero Cloud Developer Guide: Ground Travel Energy Use \(can be outdated or unavailable during release preview\)](#)



## Keep Better Track of Market-Based and Location-Based Electricity Emission Factors for Stationary Assets

Store market-based and location-based electricity emissions factor data in independent records. This eliminates duplication of location-based emissions rate information for individual stationary assets when you calculate the emissions from electricity usage.

**Where:** This change applies to Lightning Experience in Professional, Enterprise, Unlimited, and Developer editions with the Net Zero Cloud Starter or Growth license.

### SEE ALSO:

[Salesforce Help: Add a Record for Each Stationary Asset Environmental Source \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Create an Electricity Emissions Factor Set Record \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Create a Stationary Asset Energy Use Record \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Calculate Stationary Asset Carbon Footprint Items \(can be outdated or unavailable during release preview\)](#)

[Net Zero Cloud Developer Guide: Stationary Asset Energy Use \(can be outdated or unavailable during release preview\)](#)

## Make Setup Pages Accessible to Net Zero Cloud Admins

Assign the Net Zero Cloud Admin permission set to a standard user to give them access to configuration pages in Setup. The permission set eliminates the need to coordinate with a Salesforce admin with the Net Zero Cloud Manager permission set. You can assign the Net Zero Cloud Admin permission set to manage reference data, configure fuel types, upload business metrics data to run What-if analyses on a regular basis, and access the Net Zero Cloud configuration pages.

**Where:** This change applies to Lightning Experience in Professional, Enterprise, Unlimited, and Developer editions with the Net Zero Cloud Starter or Growth license.

**How:** Create or edit a non-Salesforce administrator user, and then assign the Net Zero Cloud Admin permission set to that user.

### SEE ALSO:

[Salesforce Help: Create Net Zero Cloud Profiles \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Add Net Zero Cloud Users \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Assign Permission Sets to Users \(can be outdated or unavailable during release preview\)](#)

## Other Improvements to Inventory Automation

Make annual emissions inventory management easier with the Net Zero Cloud Starter SKU. Enhance inventory calculations by associating footprints with different statuses in bulk. View the subsidiary carbon footprints aggregated into the inventory in the record's related list.

**Where:** This change applies to Lightning Experience in Professional, Enterprise, Unlimited, and Developer editions with the Net Zero Cloud Starter or Growth license.

**Why:** These improvements help your visibility and usability of annual emissions inventories.

- Make annual emissions inventory available to Net Zero Cloud Starter SKU  
Create, update, and recalculate the annual emissions inventory records, which is a part of carbon accounting, with the Net Zero Cloud Starter SKU. Previously, the annual emissions inventory was available only with the Net Zero Cloud Growth SKU.
- Associate annual inventory to carbon footprints in bulk

Enhance your inventory calculations by associating the inventory with multiple footprints by using a quick action. Select different stages for the associated footprints. Previously, you selected only one footprint stage to aggregate emissions from matching carbon footprint records into the calculated annual emissions inventory.

- View footprints related to subsidiary annual emissions inventory

In a subsidiary annual emissions inventory, view all relevant carbon footprints that were aggregated into the subsidiary inventory in the record's related list. Previously, you weren't able to view carbon footprints that were aggregated for calculating the subsidiary inventory in the related list because the carbon footprints looked up to the parent company inventory and not the subsidiary inventory.

#### SEE ALSO:

[Salesforce Help: Manage the Annual Emissions Inventory \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Set Emissions Inventory \(can be outdated or unavailable during release preview\)](#)

## Other Improvements to Emissions Factors Management

Easily select emissions factors on Net Zero Marketplace, and load and apply them in Net Zero Cloud. Improve usability by selectively updating or refreshing the emissions factors or locking the emissions factor records from being updated.

**Where:** This change applies to Lightning Experience in Professional, Enterprise, Unlimited, and Developer editions with the Net Zero Cloud Starter or Growth license.

**Why:** These improvements help manage emissions factors in Net Zero Cloud.

- Browse, select, and purchase emissions factors in Net Zero Cloud Marketplace for Net Zero Cloud.  
With all emissions factors in one place, you can now purchase Net Zero Cloud-included and provider-listed emissions factors and load them into Net Zero Cloud.
- View reference data documentation on Net Zero Cloud Marketplace  
For each version of a dataset, you can get more visibility into emission factor set methodology, publish dates, and other information by referencing the detailed documentation provided on the dataset listing. Cross-reference an emissions factor with the related marketplace listing for auditing and finding documentation.
- Track the dataset load process  
When you load a dataset by using the Setup page Load Reference Data, the details are recorded in a Reference Data Load Log record. Use the log to review or audit the dataset source, record count details, and the user who loaded the dataset.
- Easily update loaded emissions factors  
When there's a minor patch or update for an emissions factor dataset, you can now update just the changes to change the necessary values within the emissions factors.
- Lock emissions factors  
When you override an emissions factor value and don't want the dataset update process to affect your changes, you can lock the emissions factor record.
- Track the data source type for your market-based emissions factors  
Track the data source of the market-based conversion factors for the electricity emissions factors, and optionally track the electricity supplier providing this data.
- Calculate the total market-based emissions by individual greenhouse gases

Break down your calculated market-based tCO<sub>2</sub>e emissions into CO<sub>2</sub>, CH<sub>4</sub>, and N<sub>2</sub>O emissions by using the market-based emissions rate fields.

- Calculate trace emissions from clean energy projects

Associate market-based emissions factors with clean energy projects so that credits from these projects can be accounted for if trace emissions are associated with their production.

SEE ALSO:

[Salesforce Help: Manage Reference Data In Net Zero Cloud \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Emissions Factors That Affect Calculations \(can be outdated or unavailable during release preview\)](#)

## New and Changed Objects for Net Zero Cloud

Do more with the new and changed Net Zero Cloud objects.

### Changed Objects

These Net Zero Cloud objects have changes.

#### Store the document template global key associated with the DOCX template for the disclosure definition version

Use the new `DocumentTemplateGlobalKey` field of the `DisclosureDefinitionVersion` object.

#### Specify the authoring mode used to launch the disclosure authoring experience

Use the new `AuthoringMode` field of the `DisclosureDefinitionVersion` and `Disclosure` object and the `ExternalDocumentLaunchStatus` and `ExternalDocumentErrorMessage` fields of the `Disclosure` object.

#### Specify whether the record is locked from dataset updates

Use the new `ShouldLockDtastUpdtForRec` field of the `AirTravelEmssnFctr`, `InflationRate`, `BldgEnglyIntensity`, `BldgEnglyIntensityVal`, `FrgtHaulingEmssnFctr`, `ProductEmissionsFactor`, `ElectricityEmssnFctrSet`, `RefrigerantEmssnFctr`, `RentalCarEmssnFctr`, `WstDispoEmssnFctrSetltn`, `WstDispoEmssnFctrSet`, `GroundTravelEmssnFctr`, `HotelStayEmssnFctr`, `PcmtEmssnFctrSetltn`, `PcmtEmssnFctrSet`, `ProductEmissionsFactor`, `OtherEmssnFctrSetltn`, and `OtherEmssnFctrSet` objects.

#### Specify the dataset load log record that stores the history of loading reference data for emissions factors

Use the new `ExternalIdentifier` and `ReferenceDataLoadLogId` fields of the `AirTravelEmssnFctr`, `InflationRate`, `BldgEnglyIntensity`, `BldgEnglyIntensityVal`, `FrgtHaulingEmssnFctr`, `ProductEmissionsFactor`, `ElectricityEmssnFctrSet`, `RefrigerantEmssnFctr`, `RentalCarEmssnFctr`, `WstDispoEmssnFctrSetltn`, `WstDispoEmssnFctrSet`, `GroundTravelEmssnFctr`, `HotelStayEmssnFctr`, `PcmtEmssnFctrSetltn`, `PcmtEmssnFctrSet`, `ProductEmissionsFactor`, `OtherEmssnFctrSetltn`, and `OtherEmssnFctrSet` objects.

#### Store the calculated greenhouse gas emissions for the energy use record

Use the new `TaxiEmssnInKgCo2DstnUnit`, `TaxiEmssnInKgN2oDstnUnit`, `TaxiEmssnInKgCh4DstnUnit`, `TrainEmssnInKgCo2DstnUnit`, `TrainEmssnInKgN2oDstnUnit`, `TrainEmssnInKgCh4DstnUnit`, `PersCarEmssnInKgCo2DstnUnit`, `PersCarEmssnInKgN2oDstnUnit`, and `PersCarEmssnInKgCh4DstnUnit` fields of the `GroundTravelEmssnFctr` object and the `Ch4EmissionsInKg`, `Co2EmissionsInKg`, and `N2oEmissionsInKg` fields of the `GroundTravelEnergyUse` object.

#### Calculate the market-based emissions for the electricity usage of stationary asset

Use the new `EmissionsFactorType`, `MktBsdCh4EmssnRate`, `MktBsdCh4EmssnRtInTgwh`, `MktBsdCh4EmssnRateUnit`, `MktBsdCo2EmssnRate`, `MktBsdCo2EmssnRtInTmwh`, `MktBsdCo2EmssnRateUnit`, `MktBsdN2oEmssnRate`, `MktBsdN2oEmssnRtInTgwh`, `MktBsdN2oEmssnRateUnit`, `MktBsdDataSrcType`, and `MktBsdElectrSupplier` fields of the `ElectricityEmssnFctrSet` object, the `MktBsdElectriEmssnFctr` field of the `StnryAssetEnvrSrc` object, the `MktBsdElectriEmssnFctr`,

`MktBsdCh4EmsnInKg`, `MktBsdCo2EmsnInKg`, and `MktBsdN2oEmsnInKg` fields of the `StnryAssetEnrgyUse` object, the `TotEmsnUseMktBsdMthd` field of the `StnryAssetCrbnFtrprt` object, and the `ElectrEmissionsFactors` field of the `CleanEnergyProject` object.

## New Object

This Net Zero Cloud object is new.

### **Stores the history of loading reference data for emissions factors**

Use the new `ReferenceDataLoadLog` object.

SEE ALSO:

[Net Zero Cloud Developer Guide: Net Zero Cloud Standard Objects \(can be outdated or unavailable during release preview\)](#)

## New Net Zero Cloud Metadata Type

Make the most of the new metadata type of Net Zero Cloud.

## Salesforce Flow

### **Distribute energy attribute certificate credits to reduce carbon emissions in stationary asset energy use**

Use the new `dstrEnergyAttrCertCredits` value in the existing `actionType` field, which is on the `FlowActionCall` subtype of the Flow metadata type.

SEE ALSO:

[Net Zero Cloud Developer Guide: Flow for Net Zero Cloud \(can be outdated or unavailable during release preview\)](#)

## New Invocable Action in Net Zero Cloud

Use the new invocable action for Net Zero Cloud.

### **Distribute energy attribute certificate credits to reduce carbon emissions in stationary asset energy use**

Use the new `dstrEnergyAttrCertCredits` action.

SEE ALSO:

[Net Zero Cloud Developer Guide: Distribute Energy Attribute Certificate Credits Action \(can be outdated or unavailable during release preview\)](#)

## CRM Analytics for Net Zero Cloud

Use the new Program Analysis dashboards to analyze the collective impact of various sustainability programs and to assess the effectiveness of programs, program initiatives, and initiative enrollments. The Climate Action and Audit dashboards are now accessible from the Net Zero Cloud app landing page, with advanced data analysis functionalities and improved capabilities.

### [Track Program Effectiveness by Using Analytics Dashboards](#)

Gain comprehensive insights into an organization's diverse sustainability programs and their collective impact on sustainability efforts by using the new analytics dashboards. Evaluate the effectiveness of programs, program initiatives, and initiative enrollments in achieving emission reduction targets by comparing them with actuals.

### [Access the Enhanced Climate Action and Audit Dashboards Quickly](#)

Get quick access to the enhanced Climate Action and Audit dashboards from the Net Zero Cloud app's landing page. The dashboards offer advanced data analysis capabilities and improved features for collecting field feedback.

## Track Program Effectiveness by Using Analytics Dashboards

Gain comprehensive insights into an organization's diverse sustainability programs and their collective impact on sustainability efforts by using the new analytics dashboards. Evaluate the effectiveness of programs, program initiatives, and initiative enrollments in achieving emission reduction targets by comparing them with actuals.

**Where:** This change applies to Lightning Experience and all versions of the Salesforce app in Enterprise and Unlimited editions where Net Zero Cloud is enabled.

**Who:** To use these dashboards, which are part of the Net Zero Analytics app, you need the CRM Analytics Plus User and Net Zero Analytics User permissions. If you have the Net Zero Analytics Base license, you need either the Net Zero Analytics Base3 Apps User or Net Zero Analytics Base5 Apps User permission.

**How:** From Setup, in the Quick Find box, enter *Net Zero*, and then select **Net Zero Configurations**. Follow the instructions on the page to set up a Net Zero Analytics app containing the Program Analysis dashboards.


## Access the Enhanced Climate Action and Audit Dashboards Quickly

Get quick access to the enhanced Climate Action and Audit dashboards from the Net Zero Cloud app's landing page. The dashboards offer advanced data analysis capabilities and improved features for collecting field feedback.

**Where:** This change applies to Lightning Experience and all versions of the Salesforce app in Enterprise and Unlimited editions where Net Zero Cloud is enabled.

**Who:** To use these dashboards, which are part of the Net Zero Analytics app, you need the CRM Analytics Plus User and Net Zero Analytics User permissions. If you have the Net Zero Analytics Base license, you need either the Net Zero Analytics Base3 Apps User or Net Zero Analytics Base5 Apps User permission.

**How:** From Setup, in the Quick Find box, enter *Net Zero*, and then select **Net Zero Configurations**. Follow the instructions on the page to set up a Net Zero Analytics app containing the Climate Action and Audit dashboards.

 **Note:** Before embedding the analytics dashboards, ensure that you've set custom record pages as the app default. If you've set custom record pages as the org default, the new record pages will overwrite your current org-wide default settings. For more information, see [Activate Lightning Experience Record Pages](#).

SEE ALSO:

[Salesforce Help: Set Up CRM Analytics Apps for Net Zero Cloud](#)

## Public Sector Solutions

Review benefit eligibility when circumstances change and adjust disbursements. Easily refer constituents to providers by using a guided flow. Gain insights into caseload trends and community impact and boost caseworker efficiency. Speed up complaint filing for judicial and investigative cases, and enable constituents to raise service requests on the public portal to reduce administrative burden.

### [Accelerate Complaint Intake for Judicial and Investigative Cases](#)

Speed up the complaint intake process, including for civil complaints, by enabling constituents and their legal representatives to easily file complaints by completing a guided flow on the public portal. Capture and store information about the incident, participants, pertinent regulatory codes, and digital evidence to support the complaint.

### [Efficiently Manage Service Requests](#)

Reduce the administrative workload and cost to serve by enabling constituents and their legal representatives to create service requests by completing a guided flow on the public portal. Review the requests and use the Defer a Case Proceeding flow to reschedule a case proceeding. The flow fetches the deferred start and end dates from the service request and updates the dates in the corresponding case proceeding record. If desired, build additional flows to streamline service requests for other use cases.

### [Easily Add Participants to a Case Proceeding](#)

Make it easy for caseworkers to reuse case participant details and add case participants to a case proceeding. Create a custom action that uses an OmniScript to get the case participants so that caseworkers can select the relevant participants and specify their role and status.

### [Ensure Accurate Eligibility Determinations When Circumstances Change](#)

Provide a guided flow on your Experience Cloud site for constituents to easily report changes of circumstance that affect benefit eligibility, such as the birth of a child or a new job. Review the changes and the supporting documentation to determine whether they affect the constituent's benefit eligibility, and adjust disbursements accordingly.

### [Get Insights into Caseworker Productivity and Community Impact](#)

Use Caseworker Productivity analytics to manage workloads and make informed staffing decisions based on caseloads and case trends. Give supervisors insights into caseload distribution, caseworker performance, and case processing times to help them improve caseworker productivity and efficiency. Visualize the team's community impact by showing caseworkers how many beneficiaries they assisted and how much they disbursed in benefits.

### [Easily Refer Constituents to Providers by Using a Guided Flow](#)

Connect constituents to the support they need by using a guided flow to refer them to a service provider. Add information about the individual or household, the provider, and other details to enable the provider to deliver the service effectively. Share the referral record and additional information with the provider.

### [Use Filters to Aggregate a Subset of Records](#)

Use filters with record aggregation to aggregate only the records that matter to your users. Apply filters on the aggregate-from object, the aggregate-to object, and the intermediate objects that connect them. Build expressions to apply multiple filters in a logical sequence. For example, when aggregating party incomes to a party relationship group that represents a household, apply filters to aggregate the party income of only the primary group member.

### [Administer Social Insurance Benefits to Constituents](#)

Use the Benefit Management data model to enable eligible constituents to enroll in social insurance programs, file claims, upload supporting documentation, and receive benefits to compensate for a loss of income or increased expenses. Define social insurance policies, manage enrollment, and track contributions. Capture social insurance claims, claim items, and claim participants, and record claim approval status and benefit eligibility.

### [Create Business Authorization Applications with Out-of-the-Box Components](#)

Use OmniStudio components available in your org to create business license applications, including a sample salon license application. Previously, you downloaded the license application OmniScripts and other components from the Salesforce Industries Process Library and deployed them to your Public Sector Solutions org before customizing them for your specific needs.

### [Set Up the Add Complaint Participants and Add Allegations Flows with Out-of-the-Box Components](#)

Use OmniStudio components available in your org to set up guided flows to add complaint participants and allegations. Previously, you downloaded the components from the Salesforce Industries Process Library and deployed them to your Public Sector Solutions org before you set up the flows.

### [Easily Configure More Case Management Features by Using the Updated Guided Setup Assistant](#)

Help your users be productive faster. Click buttons to quickly accomplish setup tasks, and follow links to Salesforce Help for additional context and guidance for each task.

### [Control Provider Access to Benefit Assignment Records on Experience Cloud Sites](#)

Ensure constituent privacy by giving providers access only to the benefit assignment records that are manually shared with them.

### [Assign Public Sector Solutions Permissions to the Salesforce Integration User](#)

Public Sector Solutions permission set licenses are now compatible with the Salesforce Integration user, so you can grant users API-only access to the objects and features in the product.

### [New and Changed Objects in Public Sector Solutions](#)

Do more with these new and changed objects.

### [New and Changed Metadata Types in Public Sector Solutions](#)

Access more metadata through these new and changed metadata types.

### [New and Changed Tooling API Objects in Public Sector Solutions](#)

Access more metadata through these new and changed Tooling API objects.

### [Apex: New and Changed Items](#)

The new PublicSectorSlt namespace provides new class.

## New and Enhanced Common Features for Industries

Public Sector Solutions includes access to some features that are available across clouds and products in Industries. Use these features to extend and customize Public Sector Solutions based on your business needs.

- [Action Launcher](#)

Contact center agents can quickly resolve customer requests by using button and link actions and the service processes associated with service catalogs. Administrators can now customize the title on the Action Launcher component. If out-of-the-box deployments are available, administrators can use them right away to configure Action Launcher.

- [Business Rules Engine](#)

Call ready-to-use executable expression set templates from flows or other calling processes. Create precise rules with the operators and functions that consider null values. Use enhancements in decision tables to simplify and streamline lookups. Show your users more targeted and nuanced explanations for expression set version step results in Decision Explorer.

- [Data Processing Engine](#)

Use a forecast node in a Data Processing Engine definition to generate forecasts based on historical data. Use variables of type expression in a formula node when you don't know the exact evaluation or calculation logic when creating a definition.

- [Grantmaking](#)

Grant seekers can now add collaborators to help with grant applications on an Experience Cloud site. Grant makers and recipients can now see the difference between planned and actual budget spent. Grant makers can add invitation-only application funding opportunities to Experience Cloud.

- [Outcome Management](#)

Take the manual work out of adding indicator results and ensure that results are measured consistently with a flow. Collaborate with partner organizations and grantees in Experience Cloud. Connect Outcome Management to care plans in case management.

## Accelerate Complaint Intake for Judicial and Investigative Cases

Speed up the complaint intake process, including for civil complaints, by enabling constituents and their legal representatives to easily file complaints by completing a guided flow on the public portal. Capture and store information about the incident, participants, pertinent regulatory codes, and digital evidence to support the complaint.

**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 a Complaint Intake Guided Flow](#)

## Efficiently Manage Service Requests

Reduce the administrative workload and cost to serve by enabling constituents and their legal representatives to create service requests by completing a guided flow on the public portal. Review the requests and use the Defer a Case Proceeding flow to reschedule a case proceeding. The flow fetches the deferred start and end dates from the service request and updates the dates in the corresponding case proceeding record. If desired, build additional flows to streamline service requests for other use cases.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Public Sector Solutions is enabled.

## Easily Add Participants to a Case Proceeding

Make it easy for caseworkers to reuse case participant details and add case participants to a case proceeding. Create a custom action that uses an OmniScript to get the case participants so that caseworkers can select the relevant participants and specify their role and status.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Public Sector Solutions is enabled.

SEE ALSO:

[Salesforce Help: Add Case Proceeding Participants \(can be outdated or unavailable during release preview\)](#)

## Ensure Accurate Eligibility Determinations When Circumstances Change

Provide a guided flow on your Experience Cloud site for constituents to easily report changes of circumstance that affect benefit eligibility, such as the birth of a child or a new job. Review the changes and the supporting documentation to determine whether they affect the constituent's benefit eligibility, and adjust disbursements accordingly.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Public Sector Solutions is enabled.

SEE ALSO:

[Salesforce Help: Change of Circumstances \(can be outdated or unavailable during release preview\)](#)

## Get Insights into Caseworker Productivity and Community Impact

Use Caseworker Productivity analytics to manage workloads and make informed staffing decisions based on caseloads and case trends. Give supervisors insights into caseload distribution, caseworker performance, and case processing times to help them improve caseworker productivity and efficiency. Visualize the team's community impact by showing caseworkers how many beneficiaries they assisted and how much they disbursed in benefits.



**Where:** This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Public Sector Solutions is enabled.

SEE ALSO:

[Salesforce Help: Caseworker Productivity Analytics \(can be outdated or unavailable during release preview\)](#)

## Easily Refer Constituents to Providers by Using a Guided Flow

Connect constituents to the support they need by using a guided flow to refer them to a service provider. Add information about the individual or household, the provider, and other details to enable the provider to deliver the service effectively. Share the referral record and additional information with the provider.

**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 Referral Guided Flow \(can be outdated or unavailable during release preview\)](#)

## Use Filters to Aggregate a Subset of Records

Use filters with record aggregation to aggregate only the records that matter to your users. Apply filters on the aggregate-from object, the aggregate-to object, and the intermediate objects that connect them. Build expressions to apply multiple filters in a logical sequence. For example, when aggregating party incomes to a party relationship group that represents a household, apply filters to aggregate the party income of only the primary group member.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Public Sector Solutions is enabled.

SEE ALSO:

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

## Administer Social Insurance Benefits to Constituents

Use the Benefit Management data model to enable eligible constituents to enroll in social insurance programs, file claims, upload supporting documentation, and receive benefits to compensate for a loss of income or increased expenses. Define social insurance policies, manage enrollment, and track contributions. Capture social insurance claims, claim items, and claim participants, and record claim approval status and benefit eligibility.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Public Sector Solutions is enabled.

SEE ALSO:

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

## Create Business Authorization Applications with Out-of-the-Box Components

Use OmniStudio components available in your org to create business license applications, including a sample salon license application. Previously, you downloaded the license application OmniScripts and other components from the Salesforce Industries Process Library and deployed them to your Public Sector Solutions org before customizing them for your specific needs.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Public Sector Solutions is enabled.

SEE ALSO:

[Salesforce Help: Download and Install the Licensing and Permitting Process Packages](#)

## Set Up the Add Complaint Participants and Add Allegations Flows with Out-of-the-Box Components

Use OmniStudio components available in your org to set up guided flows to add complaint participants and allegations. Previously, you downloaded the components from the Salesforce Industries Process Library and deployed them to your Public Sector Solutions org before you set up the flows.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Public Sector Solutions is enabled.

## Easily Configure More Case Management Features by Using the Updated Guided Setup Assistant

Help your users be productive faster. Click buttons to quickly accomplish setup tasks, and follow links to Salesforce Help for additional context and guidance for each task.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Public Sector Solutions is enabled.

**Why:** Assistant 7: Set Up Case Management includes these updated steps.

Step	New or Updated Substep
1. Configure Care Plans	<ul style="list-style-type: none"> <li>• Create Task Templates</li> <li>• Manage Care Plan Tasks</li> <li>• Schedule Benefits</li> <li>• Add Participants to Benefit Sessions</li> <li>• Track Attendance</li> </ul>
2. Set Up Complaint Intake Flow	<ul style="list-style-type: none"> <li>• Enable Standard OmniStudio Runtime</li> <li>• Review Complaint Intake Flow Components</li> </ul>
3. Set Up Case Creation Flow	Install Case Creation Flow Components
4. Configure Group Membership to Manage Households	Assign Merge and Split Groups Permission to Users
6. Set Up Referral Intake Flow	<ul style="list-style-type: none"> <li>• Enable Standard OmniStudio Runtime</li> </ul>

Step	New or Updated Substep
	<ul style="list-style-type: none"> <li data-bbox="821 258 1253 285">Review Referral Intake Flow Components</li> </ul>

## Control Provider Access to Benefit Assignment Records on Experience Cloud Sites

Ensure constituent privacy by giving providers access only to the benefit assignment records that are manually shared with them.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Public Sector Solutions is enabled.

**Why:** If the parent record access setting on the Program and Benefit Management Settings page in Setup is enabled and users have access to a parent record of benefit assignment records, then users can also access the child benefit assignment records. When you also enable the new Benefit Assignment Access setting, provider users can only access the benefit assignment records that are manually shared with them.

**Who:** Providers who are assigned the Provider Management for Partner permission set can use this feature.

**How:** To restrict provider access to benefit assignment records on an Experience Cloud site, on the Provider Management Settings page in Setup, enable **Benefit Assignment Access**.

SEE ALSO:

[Salesforce Help: Give Caseworkers Access to Goal Assignments and Benefit Assignments Related to Care Plans \(can be outdated or unavailable during release preview\)](#)

## Assign Public Sector Solutions Permissions to the Salesforce Integration User

Public Sector Solutions permission set licenses are now compatible with the Salesforce Integration user, so you can grant users API-only access to the objects and features in the product.

SEE ALSO:

[Salesforce Release Notes: Assign the New Salesforce Integration User License to Grant API Only Access \(can be outdated or unavailable during release preview\)](#)

## New and Changed Objects in Public Sector Solutions

Do more with these new and changed objects.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Public Sector Solutions is enabled.

### Track a transaction related to a change that affects an insurance policy premium

Use the new InsurancePolicyTransaction object.

### Capture a financial compensation request for goods or services provided by a third party

Use the new PaymentRequest object.

### Capture the line item details of the financial compensation request

Use the new PaymentRequestLine object.

### Store the compensation coverage class for a worker

Use the new WorkerCompCoverageClass object.

**Store the recertification status of an enrollee's eligibility for a benefit assignment**

Use the new `RecertificationStatus` field on the existing `BenefitAssignment` object.

**Specify Public Sector as the usage type for a party expense**

Use the new `PublicSector` value in the existing `UsageType` field on the `PartyExpense` object.

**Specify Public Sector as the usage type for a party financial asset**

Use the new `PublicSector` value in the existing `UsageType` field on the `PartyFinancialAsset` object.

## New and Changed Metadata Types in Public Sector Solutions

Access more metadata through these new and changed metadata types.

**Apply a filter to a record aggregation object in a record aggregation definition**

Use the new `RecordAggregationObjectFilter` subtype of the `RecordAggregation` metadata type.

**Specify the logical sequence in which filters are applied to a record aggregation object**

Use the `filterLogic` field on the `RecordAggregationObject` subtype of the `RecordAggregation` metadata type.

## New and Changed Tooling API Objects in Public Sector Solutions

Access more metadata through these new and changed Tooling API objects.

**Apply a filter to a record aggregation object in a record aggregation definition**

Use the new `RecordAggregationObjectFilter` object.

**Specify the logical sequence in which filters are applied to a record aggregation object**

Use the new `FilterLogic` field on the existing `RecordAggregationObject` object.

## Apex: New and Changed Items

The new `PublicSectorSltn` namespace provides new class.

### New Class

**Create an outbound referral record from the Create Outbound Referral OmniScript page**

Use the new `CreateOutboundReferral` class.

SEE ALSO:

[Public Sector Solutions Developer Guide: PublicSectorSltn Namespace](#)

## Rebate Management

Capture your discounts in your special pricing terms and benefits with greater accuracy, and view more decimal places for sales and reference prices. Precisely evaluate your financial obligations for a rebate program by specifying more specific accrual rates in rebate types. Quickly transfer rebate claim, ship and debit claim, and transaction receipt details from CSV files to Salesforce.

### [Design Special Pricing Terms with More Precision](#)

Bring granularity into your ship and debit programs by creating special pricing terms and benefits that have discounts with up to four decimal places. Previously, you defined discounts with up to two decimal places only. View more decimal places in sales prices and references prices in special pricing terms and benefits.

### [Project Accurate Accruals with Precise Accrual Rates](#)

Estimate potential financial commitments for rebates more accurately with more precise accrual rates. Enter accrual rates with up to four decimal places for a rebate type. Previously, you defined accrual rates with up to two decimal places only.

### [Efficiently Import Incentive Claims and Transaction Data from CSV Files](#)

Import the rebate claims, ship and debit claims, proofs-of-sales, transaction receipts, and other records of your partners from CSV files to Salesforce. Quickly insert, update, or upsert large sets of data to save time and prevent data entry errors. Upload a CSV file, select the target object, select the type of import operation, and map each field in the file to the fields in the object. Find and correct the data quality issues during the import process.

### [Changed Fields in Rebate Management and Ship and Debit Process Management](#)

Rebate Management and Ship and Debit Process Management come with these changed fields.

## New and Enhanced Common Features in Industries

Rebate Management includes some features that are available across the clouds and products in Industries. Use these features to extend and customize Rebate Management as per your business needs.

- [Batch Management](#)

Select records from big objects to run batch jobs in Batch Management.

- [Business Rules Engine](#)

Design a ship and debit claim validation process with sophisticated rules by using Business Rules Engine. Call the ready-to-use executable expression set templates from flows. Create precise rules with the operators and functions that consider null values. Use the enhancements in decision tables to simplify and streamline lookups. Show your users more targeted and nuanced explanations for expression set version step results with the enhancements in Decision Explainer.

- [Context Service](#)

Simplify the consumption of data in your ship and debit claim validation processes by using Context Service. Extend the standard context definitions that are shipped with Rebate Management to create custom definitions that suit your business requirements. To upgrade the standard definition components that are used in the extended custom definitions, effortlessly sync the custom definitions.

- [Data Processing Engine](#)

Orchestrate your rebate payout calculations by using Data Processing Engine. Enjoy more Data Cloud flexibility in your definitions with more object types to choose from in data source and writeback nodes. Choose Data Cloud Data Spaces for your definition. Troubleshoot quickly by restoring previous field selections in your data source when you encounter an issue with a reference node. Upload CSV file data and write it back to an entity in Salesforce.

## Design Special Pricing Terms with More Precision

Bring granularity into your ship and debit programs by creating special pricing terms and benefits that have discounts with up to four decimal places. Previously, you defined discounts with up to two decimal places only. View more decimal places in sales prices and references prices in special pricing terms and benefits.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions with Ship and Debit Process Management.

**How:** Enable More Decimals on Price to enter values with more than two decimal places for sales prices and references prices in special pricing terms and benefits.

## Project Accurate Accruals with Precise Accrual Rates

Estimate potential financial commitments for rebates more accurately with more precise accrual rates. Enter accrual rates with up to four decimal places for a rebate type. Previously, you defined accrual rates with up to two decimal places only.

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

**How:** Create a Program Rebate Type record, and enter an accrual rate value with up to four decimal places.

## Efficiently Import Incentive Claims and Transaction Data from CSV Files

Import the rebate claims, ship and debit claims, proofs-of-sales, transaction receipts, and other records of your partners from CSV files to Salesforce. Quickly insert, update, or upsert large sets of data to save time and prevent data entry errors. Upload a CSV file, select the target object, select the type of import operation, and map each field in the file to the fields in the object. Find and correct the data quality issues during the import process.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions with Rebate Management or Ship and Debit Process Management.

## Changed Fields in Rebate Management and Ship and Debit Process Management

Rebate Management and Ship and Debit Process Management come with these changed fields.

Here are the changed fields in Rebate Management and Ship and Debit Process Management.

### **BEHAVIOR CHANGE: Define accrual rates with more precision**

The existing `AccrualRate` field in the `ProgramRebateType` object now has a length of 14 and 4 decimal places. Previously, the field had a length of 16 and 2 decimal places.

### **BEHAVIOR CHANGE: Create special pricing terms with more precision**

The existing `Discount` field in the `RebatePartnerSpecialPrcTrm` object now has a length of 14 and 4 decimal places. Previously, the field had a length of 16 and 2 decimal places.

The existing `SalePricePerUnit` and `ReferencePricePerUnit` fields in the `RebatePartnerSpecialPrcTrm` object now have a length of 14. Previously, the fields had a length of 16.

### **BEHAVIOR CHANGE: Create special pricing term benefits with more precision**

The existing `Discount` field in the `RebatePtnrSpclPrcTrmBnft` object now has a length of 14 and 4 decimal places. Previously, the field had a length of 16 and 2 decimal places.

The existing `ReferencePricePerUnit` field in the `RebatePtnrSpclPrcTrmBnft` object now has a length of 14. Previously, the field had a length of 16.

## Referral Marketing

Run referral promotions that belong to your company's various brands, geographies, or business lines under one referral program. Use the Process Referral Event action in your company's business process flows to manage activities such as advocates referring their friends, friends signing up, and friends completing their first purchase.

### [Bring Referral Promotions of the Company's Various Brands Under One Roof](#)

Companies that run multiple brands can design a single referral program and add each brand's referral promotion to the program. When a brand's marketing manager creates a promotion, they can select the Marketing Cloud business unit that the referral promotion belongs to. The promotion's marketing journeys send emails from the promotion's Marketing Cloud business unit. The marketing manager can also extend the promotion's journeys and emails from the business unit.

### [Bake Referral Processes into the Brand's Existing Business Processes](#)

The Process Referral Events action in Flow Builder lets admins process referral promotion activities as part of a larger business process. The action automates the processing of advocates referring their friends, friends signing up, and friends completing their first purchase. If a brand allows customers to refer their friends while visiting their store, add the Process Referral Events action to the flow that tracks store visits. The action can also be added to the business processes that manage new customer sign-ups or customer orders.

### [Grow a Referral Program Base by Identifying Members Who Are Likely to Refer](#)

Enhance the accuracy in scoring the likelihood of referral program members referring friends by creating separate models for each referral program. Increase your customer base, manage costs effectively, and reduce member discontent by targeting individuals with higher referral likelihood scores.

### [Watch Referral Marketing Videos](#)

New videos help your users learn about the capabilities of Referral Marketing.

### [Changed Objects in Referral Marketing](#)

Access and manage your Referral Marketing data through these objects.

### [New Invocable Actions in Referral Marketing](#)

Use the new and changed invocable actions for Referral Marketing.

### [New Referral Marketing Metadata Types](#)

Make the most of the new and changed metadata types of Referral Marketing.

## Bring Referral Promotions of the Company's Various Brands Under One Roof

Companies that run multiple brands can design a single referral program and add each brand's referral promotion to the program. When a brand's marketing manager creates a promotion, they can select the Marketing Cloud business unit that the referral promotion belongs to. The promotion's marketing journeys send emails from the promotion's Marketing Cloud business unit. The marketing manager can also extend the promotion's journeys and emails from the business unit.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Referral Marketing is enabled.

**Why:** Company executives can easily review and compare each brand's referral promotion performance when all the promotions roll up to the same program. Marketing managers can design and market promotions based on the business unit's marketing strategy. If a company uses business units for different geographies or business lines, marketing managers can run promotions unique to their geography or business line.

**How:** On the Marketing Cloud Integration page in Setup, admins can connect the Marketing Cloud business unit of each brand to Referral Marketing. Marketing managers can then select the business unit that their brand's promotion belongs to.

**Marketing Cloud Integration**  
Connected Marketing Cloud orgs and their connected business units.

**Marketing Cloud Integration**

**Referral Marketing's Integration with Marketing Cloud**  
Send personalized emails to your customers and their referrals at different stages of referral promotions using Marketing Cloud journeys. Enabled

**Connected Marketing Cloud Orgs** Add Connection

<input type="checkbox"/>	Business Unit Name	Business Unit...	Send Classification	Named Credential	Connected To
<input type="checkbox"/>	Level X Brand	MID	Referral Email	Marketing Cloud Authentication (Business ...	Referral Marketing

SEE ALSO:

[Salesforce Help: Marketing Cloud Business Unit Connection \(can be outdated or unavailable during release preview\)](#)

## Bake Referral Processes into the Brand's Existing Business Processes

The Process Referral Events action in Flow Builder lets admins process referral promotion activities as part of a larger business process. The action automates the processing of advocates referring their friends, friends signing up, and friends completing their first purchase. If a brand allows customers to refer their friends while visiting their store, add the Process Referral Events action to the flow that tracks store visits. The action can also be added to the business processes that manage new customer sign-ups or customer orders.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Referral Marketing is enabled.

**Why:** You can also add conditions before and follow-up actions after the Process Referral Event action. The conditions decide whether the action is executed, and the follow-up actions create or update records in the org. If a brand wants to reward advocates when their referred friends are issued a credit card, the conditions can be added before the Process Referral Event action. After the Process Referral Events action, another action can send an email to the referred friend that includes the credit card details.

**How:** On the Flow Builder canvas, click **Add Element**, and select **Action**. Search for and select **Process Referral Event**.



### New Action

Filter By

Category ▼

- All
- Users
- Loyalty
- Identity Verification
- Messaging
- Commerce Search
- Notifications
- Email
- Industries
- Prompt Template
- Sales leads

+ Create HTTP Callout

Action

Process Referral Event

Use values from earlier in the flow to set the inputs for the "Process Referral Event" core action. To use its outputs later in the flow, store them in variables.

\* Label \* API Name

Manage Referred Friend Signups Manage\_Referred\_Friend\_Signups

Description

The process manages the sign of friends referred by promotion advocates.

**Set Input Values for the Selected Action**

\* Activity Date Time ?

{!friendSignupDate}

---

A<sub>3</sub> \* Event Type ?

Referral Sign Up

---

A<sub>3</sub> \* Referral Code ?

Give10Get10

---

A<sub>3</sub> External Reference Number  Don't Include

---

A<sub>3</sub> Product ID  Don't Include

Cancel
Done

SEE ALSO:

[Salesforce Help: Marketing Cloud Business Unit Connection](#) (can be outdated or unavailable during release preview)

[Referral Marketing Developer Guide: Process Referral Event](#) (can be outdated or unavailable during release preview)

## Grow a Referral Program Base by Identifying Members Who Are Likely to Refer

Enhance the accuracy in scoring the likelihood of referral program members referring friends by creating separate models for each referral program. Increase your customer base, manage costs effectively, and reduce member discontent by targeting individuals with higher referral likelihood scores.

**Where:** This change applies to Lightning Experience in Enterprise, and Unlimited editions where Referral Marketing, CRM Analytics for Referral Marketing, and Scoring Framework are enabled.

**Who:** When creating CRM Analytics template configurations in Scoring Framework, the Referral Likelihood Score (Referral Marketing) template configuration type is available to users with the Referral Marketing and Loyalty Analytics Apps permission set licenses.

**How:** To get predictions, go to the Scoring Framework page in Setup. Create a CRM Analytics template configuration by using the Referral Likelihood Score (Referral Marketing) template configuration type. After activating the template, go to the Likelihood of Referrals dashboard in CRM Analytics to analyze the referral likelihood score, member and transaction details by referral program, and the state and city of contacts.

## Watch Referral Marketing Videos

New videos help your users learn about the capabilities of Referral Marketing.

- [How Salesforce Referral Marketing Works](#) shows how a referral program works for your customers and how Referral Marketing can help your brand grow its customer base organically.
- [Get Your Org Ready for Referral Marketing](#) shows how admins can set up Referral Marketing in their Salesforce org.
- [Design a Referral Program](#) shows how marketing managers can create a referral program and design their referral promotions.

## Changed Objects in Referral Marketing

Access and manage your Referral Marketing data through these objects.

### Connect Referral Marketing with multiple Marketing Cloud business units

Use the new `BusinessUsage`, `EmailConfiguration`, and `OrganizationIdentifier` fields in the `InternalOrganizationUnit` object.

### Associate a referral promotion with a Marketing Cloud business unit

Use the new `BusinessUnitId` field in the `Promotion` object.

SEE ALSO:

[Referral Marketing Developer Guide: Process Referral Event \(can be outdated or unavailable during release preview\)](#)

## New Invocable Actions in Referral Marketing

Use the new and changed invocable actions for Referral Marketing.

### Create referral event records when an advocate refers a friend, or when referred friends sign up or make a purchase

Use the new `processReferralEvent` action.

SEE ALSO:

[Referral Marketing Developer Guide: Process Referral Event \(can be outdated or unavailable during release preview\)](#)

## New Referral Marketing Metadata Types

Make the most of the new and changed metadata types of Referral Marketing.

### Salesforce Flow

#### Create referral event records when an advocate refers a friend, or when referred friends sign up or make a purchase

Use the new `processReferralEvent` value in the existing `actionType` field, which is on the `FlowActionCall` subtype of the `Flow` metadata type.

## 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

Create and manage mentoring programs, customize and expand the application experience, and modify existing learning courses and learning programs by using the Learning Wizard. Use the new Education Portal template to create a single portal that supports a variety of roles. Add the new Action Center component to your portal to help learners create and manage action plans, as well as other assigned tasks.

### [Use Education Cloud to Support Mentoring](#)

Use the new Mentoring app to create and manage mentoring programs, assign benefits, and manage assessments. Using an Experience Cloud site as a portal, mentors and mentees can enroll in programs, and mentors can register as providers of benefits. Facilitators can use assessments to connect a mentee with a mentor who can address the mentee's needs and goals.

### [Support Learners with Mentoring Programs](#)

Define mentoring support programs with related benefits. Show programs on the mentee and mentor portals so that participants can view the details and enroll themselves. Use the provided flows to automatically create program enrollments and update constituent roles for participants. Add assessments to programs to identify the requirements of a mentee and match them with a mentor who can fulfill those requirements.

### [Create Mentoring Program Enrollment Portals](#)

Use Experience Builder to enhance your Experience Cloud site with the new Lightning Web Components for mentoring. Create a portal for mentors and mentees where they can enroll in mentoring programs and see benefit assignments. Mentors can also enroll as a provider of benefits on the mentor portal.

### [Create Mentoring Records Using Education Public API](#)

Use the Industries Education Public API to match a mentor with a mentee and create related records. The public API updates Benefit Assignment records with Provider lookup and creates Contact Contact Relationship and Party Role Relationship records for Mentoring participants.

### [Customize the Application Experience For Your Users](#)

Education Cloud provides a flexible and customizable application experience. You can use Education Cloud's OmniStudio application templates to create your own application. Use action plans along with new Education Cloud objects to map application requirements to their corresponding application sections.

### [Create an Applicant Portal for Parents, Guardians, and Agents](#)

In Education Cloud, a student can submit an application for themselves. Also, a third party, such as a parent, guardian, caretaker, or agent, can submit an application for the student, create student data, and manage applications for the students that they represent from the same portal. Education Cloud provides automation and configuration steps to ensure the appropriate sharing for records and accounts.

### [Leverage AI to Discover Skills for Courses and Programs \(Pilot\)](#)

Find the skills that you want to associate with your learning courses and programs by using the Einstein Skills Generator. Let Einstein suggest skills that fit the course or program based on data from the public domain, or choose from the skills that you used before.

### [Use the Education Portal Template to Create Customized Sites for a Variety of Learners](#)

Build a portal to serve prospective, current, and former students, all from the same Digital Experience template. The Education Applicant Portal template is now the Education Portal template and includes components for applicant, student, and alumni sites. Your learners can submit and track applications, access support programs, request advising, view and manage assigned tasks, and access an alumni directory. Make features available by learner roles by using audiences.

### [Create Action Plans by Using Action Plan Templates in Action Center](#)

Learners can use the new Lightning Web Component from Education Cloud, Action Center, to create action plans from the templates that are available to them, based on the associated support program or advising category. In Action Center, learners can view their tasks and action plans, update the task status, and add tasks to their action plans.

### [Manage Action Plans on the Case Record Page](#)

Enhance the case Lightning record page to enable advisors to view and manage the action plans assigned to the learner. On the Action Plans tab, advisors can add new action plans and manage the tasks under each assigned action plan.

### [Modify Your Learning Offerings in the Learning Wizard](#)

Use the Learning Wizard in Academic Operations to edit your learning courses and learning programs. Reset the learning requirements to define new prerequisites, corequisites, or recommendations, and add new learning outcomes.

### [View Learning Program Plan Details in Program Plan Summary](#)

Learners can use the new Lightning Web Component from Education Cloud, Learning Program Plan Summary, to view the details of a learning program plan, such as the description, requirements, and the details of associated learning programs. Program Plan Summary is also available as a tab on the updated learning program plan record page.

### [Enhance Institutional Efficiency by Using Analytics Insights](#)

Gain insights into the efficiency of an institution's learning programs, application processes, and faculty management by using the new Learning Programs and Course Insights dashboard. Analyze applicants, enrolled students, and faculty across departments, programs, and academic terms to identify high-demand programs. Use DEI Insights to assess the diversity aspects of students and get faculty utilization insights for optimizing resource allocation.

### [Use Fundraising Updates for Advancement](#)

Updates to Fundraising include an easier way to build integration, a new way to attribute revenue on gift commitments, Outreach Source Code URLs for improved digital fundraising and tracking, and streamlined donor support requests and accounting tasks.

### [Create and Manage Mandated Reports Using Disclosure and Compliance Hub](#)

Education Cloud licensing now includes Disclosure and Compliance Hub. Enable Disclosure and Compliance Hub so that you can organize questions, answers, and generate reports that can be easily accessed and tracked.

### [Support Programs and Benefits Using Outcome Management](#)

Education Cloud Licensing now includes Outcome Management. Enable Outcome Management so that you can use feature enhancements for program management and benefit disbursements, like those for advising and mentoring.

### [Update OmniStudio Designer Settings](#)

Beginning with Spring '24, all Education Cloud features that use OmniStudio are enabled for standard runtime. Previously, Education Cloud used the managed package runtime. Now, users must enable standard runtime.

### [Migrate Managed Packages to Education Cloud](#)

Use the Education Cloud Data Migration Kit to map and copy your data from Admissions Connect, Student Success Hub, and Education Data Architecture to Education Cloud objects. You can migrate your data within your current org or to a new org, depending on your setup and needs. You can also use the included mapping documents to plan your migration approach with other tools.

### [New and Changed Objects in Education Cloud](#)

Do more with the new and updated Education Cloud objects.

### [New Connect REST API Resource in Education Cloud](#)

Learn more about the available resource in Education Cloud.

## New and Enhanced Common Features for Industries

Education Cloud includes access to some features that are available across clouds and products in Industries. Use these features to extend and customize Education Cloud based on your business needs.

- [Action Launcher](#)

Use action launcher to provide quick and focussed support to learners in your institution, such as sending an email to an advisee or logging a call to a mentee.

- [Actionable Segmentation](#)

Use actionable list members to provide personalized and targeted engagement with learners. Create lists of parents and students, emergency call lists, or parent lists based on a set of criteria.

- [Business Rules Engine](#)

Execute business logic at scale without code. For example, route prospects to the right counselor based on attributes from their interests form, or route learners to the right staff member to follow up on an application.

- [Data Processing Engine](#)

Use Data Processing Engine to transform data that's available in your Salesforce org and write back the transformation results as new or updated records. For example, you can use DPE and flows to set up and maintain person public profile records for you alumni community.

- [Outcome Management](#)

Use Outcome Management to define, measure, and evaluate the impact of your institution's outcome strategy. To achieve the desired outcomes, an educational institution would create various programs, such as for advising, mentoring, or other non-scholastic programs.

- [Timeline](#)

Bring in multiple objects into one list so that staff can reference a chronological view of applicants or students' engagement to evaluate progress and take action. For example, create a Student Activities timeline that references cases, service appointments, record alerts, or care plans.

## Use Education Cloud to Support Mentoring

Use the new Mentoring app to create and manage mentoring programs, assign benefits, and manage assessments. Using an Experience Cloud site as a portal, mentors and mentees can enroll in programs, and mentors can register as providers of benefits. Facilitators can use assessments to connect a mentee with a mentor who can address the mentee's needs and goals.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where the Education Cloud license is enabled.

**Who:** Users with the Education Cloud Full Access permission set can use this feature.

**How:** Enable the Mentoring app in Setup. Then, from the App Launcher, find and select **Mentoring**.

SEE ALSO:

[Salesforce Help: Set Up Mentoring \(can be outdated or unavailable during release preview\)](#)

## Support Learners with Mentoring Programs

Define mentoring support programs with related benefits. Show programs on the mentee and mentor portals so that participants can view the details and enroll themselves. Use the provided flows to automatically create program enrollments and update constituent roles for participants. Add assessments to programs to identify the requirements of a mentee and match them with a mentor who can fulfill those requirements.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where the Education Cloud license is enabled.

**Who:** Users with the Education Cloud Full Access permission can use this feature. Users with the Education Cloud for Experience Cloud Access permission set can access the Mentoring portals.

**How:** In Mentoring, from the app navigation menu, select **Programs**, and then click **New Support Program**.

SEE ALSO:

[Salesforce Help: Create Mentoring Programs \(can be outdated or unavailable during release preview\)](#)

## Create Mentoring Program Enrollment Portals

Use Experience Builder to enhance your Experience Cloud site with the new Lightning Web Components for mentoring. Create a portal for mentors and mentees where they can enroll in mentoring programs and see benefit assignments. Mentors can also enroll as a provider of benefits on the mentor portal.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where the Education Cloud license is enabled.

**Who:** Users with the Education Cloud Full Access permission set can create or modify sites in Experience Builder. Users with the Education Cloud for Experience Cloud Access permission set can access the mentor and mentee portals.

SEE ALSO:

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

## Create Mentoring Records Using Education Public API

Use the Industries Education Public API to match a mentor with a mentee and create related records. The public API updates Benefit Assignment records with Provider lookup and creates Contact Contact Relationship and Party Role Relationship records for Mentoring participants.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where the Education Cloud license is enabled.

**Who:** Users with the Education Cloud Full Access permission set can access this feature.

**How:** Use the Mentoring Connect API endpoints to create records for mentoring participants.

## Customize the Application Experience For Your Users

Education Cloud provides a flexible and customizable application experience. You can use Education Cloud's OmniStudio application templates to create your own application. Use action plans along with new Education Cloud objects to map application requirements to their corresponding application sections.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where the Education Cloud license is enabled.

**Who:** Users with the Education Cloud Full Access permission set can create and customize applications.

SEE ALSO:

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

## Create an Applicant Portal for Parents, Guardians, and Agents

In Education Cloud, a student can submit an application for themselves. Also, a third party, such as a parent, guardian, caretaker, or agent, can submit an application for the student, create student data, and manage applications for the students that they represent from the same portal. Education Cloud provides automation and configuration steps to ensure the appropriate sharing for records and accounts.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where the Education Cloud license is enabled.

**Who:** Users with the Education Cloud Full Access permission set can create and customize applications. Users with the Education Cloud for Experience Cloud license can access the application form on your Experience Cloud site.

**How:** Create an Experience Cloud site with Education Cloud components to support third-party submission of applications.


SEE ALSO:

[Salesforce Help: Get Started with Applications \(can be outdated or unavailable during release preview\)](#)

## Leverage AI to Discover Skills for Courses and Programs (Pilot)

Find the skills that you want to associate with your learning courses and programs by using the Einstein Skills Generator. Let Einstein suggest skills that fit the course or program based on data from the public domain, or choose from the skills that you used before.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where the Education Cloud license 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. To participate in the pilot, contact your Salesforce Product Manager. This feature is subject to change, may be discontinued with no notice at any time in Salesforce's sole discretion, and Salesforce 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:** Users with the Education Cloud Full Access permission and the Education Cloud Generative AI Features permission set can use Einstein Skills Generator.

**How:** Enable Einstein for Education Cloud in Setup. Then, from the app navigation menu in the Academic Operations app, select **Learning Courses** and click **New from Learning Wizard**.

## Use the Education Portal Template to Create Customized Sites for a Variety of Learners

Build a portal to serve prospective, current, and former students, all from the same Digital Experience template. The Education Applicant Portal template is now the Education Portal template and includes components for applicant, student, and alumni sites. Your learners can submit and track applications, access support programs, request advising, view and manage assigned tasks, and access an alumni directory. Make features available by learner roles by using audiences.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where the Education Cloud license is enabled.

**Who:** Users with the Education Cloud Full Access permission can use this feature.

**How:** From Setup, in the Quick Find box, enter *Digital Experiences*, and then select **All Sites**. On the Digital Experiences page, click **New**. On the Lightning Experience setup flow, choose the **Education Portal** template.

## Create Action Plans by Using Action Plan Templates in Action Center

Learners can use the new Lightning Web Component from Education Cloud, Action Center, to create action plans from the templates that are available to them, based on the associated support program or advising category. In Action Center, learners can view their tasks and action plans, update the task status, and add tasks to their action plans.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where the Education Cloud license is enabled.

**Who:** Users with the Education Cloud Full Access permission set can create or modify sites in Experience Builder. Users with the Education Cloud for Experience Cloud Access permission set can access the learner portal.

**How:** From Setup, in the Quick Find box, enter *Digital Experiences*, and then select **All Sites**. Select your learner portal, then add and configure the Action Center component using Experience Builder.

SEE ALSO:

[Salesforce Help: Set Up Action Plans For Learners \(can be outdated or unavailable during release preview\)](#)

## Manage Action Plans on the Case Record Page

Enhance the case Lightning record page to enable advisors to view and manage the action plans assigned to the learner. On the Action Plans tab, advisors can add new action plans and manage the tasks under each assigned action plan.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where the Education Cloud license is enabled.

**Who:** Users with the Education Cloud Full Access permission set can create or modify pages in Lightning App Builder.

**How:** In Student Success, on a case record page, click **Setup**, and then select **Edit Page**. Make your changes, and then activate the page.

SEE ALSO:

[Salesforce Help: Set Up Action Plans For Learners \(can be outdated or unavailable during release preview\)](#)

## Modify Your Learning Offerings in the Learning Wizard

Use the Learning Wizard in Academic Operations to edit your learning courses and learning programs. Reset the learning requirements to define new prerequisites, corequisites, or recommendations, and add new learning outcomes.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where the Education Cloud license is enabled.

**Who:** Users with the Education Cloud Full Access permission set can modify the learning offerings in the Learning Wizard.

**How:** In Academic Operations, click **Edit in Learning Wizard** on the action menu for the learning course or learning program, and then make and save your changes in the Learning Wizard.

SEE ALSO:

[Salesforce Help: Academic Operations App \(can be outdated or unavailable during release preview\)](#)



## View Learning Program Plan Details in Program Plan Summary

Learners can use the new Lightning Web Component from Education Cloud, Learning Program Plan Summary, to view the details of a learning program plan, such as the description, requirements, and the details of associated learning programs. Program Plan Summary is also available as a tab on the updated learning program plan record page.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where the Education Cloud license is enabled.

**Who:** Users with the Education Cloud Full Access permission set can create or modify sites in Experience Builder. Users with the Education Cloud for Experience Cloud Access permission set can access the learner portal.

**How:** From Setup, in the Quick Find box, enter *Digital Experiences*, and then select **All Sites**. Select your learner portal, add an object page for learning program plan, and then add and configure the Program Plan Summary component using Experience Builder.

SEE ALSO:

[Salesforce Help: Set Up Learning Program Plan Summary For Learners \(can be outdated or unavailable during release preview\)](#)

## Enhance Institutional Efficiency by Using Analytics Insights

Gain insights into the efficiency of an institution's learning programs, application processes, and faculty management by using the new Learning Programs and Course Insights dashboard. Analyze applicants, enrolled students, and faculty across departments, programs, and academic terms to identify high-demand programs. Use DEI Insights to assess the diversity aspects of students and get faculty utilization insights for optimizing resource allocation.

**Where:** This change applies to Lightning Experience in Developer, Enterprise, and Unlimited editions where Education Cloud and CRM Analytics for Education Cloud are enabled.

**Who:** Only Education Cloud users with the CRM Analytics for Education Cloud license can use this feature.

**How:** From Setup, in the Quick Find box, enter *Education*, and then select **Configure Education Analytics**. Follow the instructions on the page to set up an Education Analytics app with the Learning Programs and Course Insights dashboard.

SEE ALSO:

[Salesforce Help: Learning Programs and Course Insights \(can be outdated or unavailable during release preview\)](#)

## Use Fundraising Updates for Advancement

Updates to Fundraising include an easier way to build integration, a new way to attribute revenue on gift commitments, Outreach Source Code URLs for improved digital fundraising and tracking, and streamlined donor support requests and accounting tasks.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where the Education Cloud license is enabled.

**Who:** Users with the Education Cloud Full Access permission set can access Fundraising.

SEE ALSO:

[Fundraising Enhancements \(can be outdated or unavailable during release preview\)](#)

## Create and Manage Mandated Reports Using Disclosure and Compliance Hub

Education Cloud licensing now includes Disclosure and Compliance Hub. Enable Disclosure and Compliance Hub so that you can organize questions, answers, and generate reports that can be easily accessed and tracked.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where the Education Cloud license is enabled.

**Who:** Users with the Education Cloud Full Access permission set can access this feature.

**How:** Enable Disclosure and Compliance Hub in Setup.

SEE ALSO:

[Disclosure and Compliance Hub \(can be outdated or unavailable during release preview\)](#)

## Support Programs and Benefits Using Outcome Management

Education Cloud Licensing now includes Outcome Management. Enable Outcome Management so that you can use feature enhancements for program management and benefit disbursements, like those for advising and mentoring.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where the Education Cloud license is enabled.

**Who:** Users with the Education Cloud Full Access permission set can access this feature.

**How:** Enable Outcome Management in Setup.

SEE ALSO:

[Outcome Management Setup \(can be outdated or unavailable during release preview\)](#)

## Update OmniStudio Designer Settings

Beginning with Spring '24, all Education Cloud features that use OmniStudio are enabled for standard runtime. Previously, Education Cloud used the managed package runtime. Now, users must enable standard runtime.

**Where:** This change applies to Lightning Experience in Performance, Enterprise, Unlimited, and Developer editions where the Education Cloud license is enabled.

**Who:** Users with the Education Cloud Full Access permission set can use this feature.

**How:** In OmniStudio Settings, turn off Managed Package Runtime, and then turn on Deploy Custom Lightning Web Components in Standard Runtime.

SEE ALSO:

[Salesforce Help: Set Up Dependent Features](#)

## Migrate Managed Packages to Education Cloud

Use the Education Cloud Data Migration Kit to map and copy your data from Admissions Connect, Student Success Hub, and Education Data Architecture to Education Cloud objects. You can migrate your data within your current org or to a new org, depending on your setup and needs. You can also use the included mapping documents to plan your migration approach with other tools.

**Where:** The Education Cloud Data Migration Kit is compatible with Lightning Experience in Enterprise, Unlimited, and Developer editions where the Education Cloud license is enabled.

**Who:** Users with the Education Cloud Full Access permission set can access the migration kit. The Data Migration Kit is best used by advanced admins (Salesforce Certified Administrators, for example) or with assistance from a Salesforce Partner.

**Why:** The Education Cloud Data Migration Kit is designed to copy data as part of a larger migration effort. It's preconfigured for managed package objects and fields which you can edit or supplement to include additional custom objects and fields. The kit guides implementers to the Person Account migration process, but it doesn't migrate any other metadata nor custom code.

SEE ALSO:

[Salesforce Help: Migrate Your Data to Education Cloud](#)

## New and Changed Objects in Education Cloud

Do more with the new and updated Education Cloud objects.

### **Specify whether the action plan template is shown on the learner portal or not**

Use the new `ShouldShowOnLearnerPortal` field on the `ActionPlanTemplate` object.

### **Specify the record type associated with an action plan template assignment**

Use the new `AssociatedRecordType` field on the `ActionPlanTemplateAssignment` object.

### **Specify the account associated with an application decision**

Use the new `AccountId` field on the existing `ApplicationDecision` object.

### **Specify the account associated with a person education**

Use the new `AccountId` field on the existing `PersonEducation` object.

### **Specify the account associated with a person employment**

Use the new `AccountId` field on the existing `PersonEmployment` object.

### **Specify the account associated with a person examination**

Use the new `AccountId` field on the existing `PersonExamination` object.

### **Specify the contact who submits an application**

Use the new `SubmittedByContactId` field on the existing `PreliminaryApplicationRef` object.

### **Specify the URL of a saved application that's associated with an individual application task**

Use the new `SavedApplicationUrl` field on the existing `IndividualApplicationTask` object.

### **Specify how a part of an application can be rendered**

Use the new `ApplicationRenderMethod` object.

### **Assign an application render method to a component that's rendered in an application**

Use the new `ApplnRenderMethodAssignment` object.

### **Specify people or organizations associated with providing benefits to program participants**

Use the new `ProviderOffering` object.

### **Indicate whether a user can self-register as a provider of the benefit on an Experience Cloud site**

Use the new `CanRegisterAsProvider` field on the existing `Benefit` object.

### **Specify the contact who provides the benefit that's associated with a benefit assignment**

Use the new `ProviderId` field on the `BenefitAssignment` object.

## New Connect REST API Resource in Education Cloud

Learn more about the available resource in Education Cloud.

### Add provider's contact ID to a Benefit Assignment record, and create Party-Role Relationship (PRR) and Contact Contact Relationship (CCR) records

Make a POST request to the new

`/connect/education/mentoring/benefit-assignment/benefitAssignmentId/provider` resource.

New request body: Mentoring Benefit Assignment Input

New response body: Mentoring Benefit Assignment

SEE ALSO:

[Education Cloud Developer Guide: REST Reference](#)

## Salesforce for Nonprofits

Salesforce for Nonprofits includes managed package and platform solutions for nonprofits. Nonprofit Cloud, built on the Salesforce platform, enhancements for fundraising make it easier to measure ROI for donor upgrade campaigns, improve digital fundraising and tracking, and streamline donor support requests. Nonprofit Cloud enhancements for programs and Grantmaking include Experience Cloud improvements, indication of which care plan goals you expect to drive outcomes, and the auto-calculation of results for outcomes. Updates to the Nonprofit Success Pack managed package improve identifying and correcting potential duplicates.

### [Nonprofit Cloud](#)

Nonprofit Cloud enhancements make it easier to build integrations, to measure the ROI of upgraded campaigns by using a new way to attribute revenue on gift commitments, to improve digital fundraising and tracking with Outreach Source Code URLs, and to streamline donor support requests and accounting tasks by tracking payment data.

### [IdeaExchange Delivered: Find and Fix Potential Duplicates in Nonprofit Success Pack \(Managed Package\)](#)

Review, select, and merge potential duplicate contacts on the NPSP Contact Merge page. Use the new NPSP Potential Duplicates Lightning Web Component to go to the NPSP Contact Merge page. This feature replaces the standard Potential Duplicates component on the Contact page. We delivered this feature thanks to your ideas on IdeaExchange.

### [Security Enhancements for Volunteers for Salesforce \(Managed Package\)](#)

Volunteers for Salesforce is now more secure thanks to small updates.

### [Connect REST APIs](#)

Connect REST APIs for Fundraising enables ISV to integrate with Salesforce software and UIs, enhance digital fundraising capabilities, and improve tracking of gift commitments and transactions.

### [Elevate Retirement](#)

Salesforce is retiring the Elevate family of products. This affects Elevate Advanced Edition, Elevate Power of Us Editions, and all add-ons. As part of this product retirement, the ability to renew subscriptions to this product will end on October 1, 2023, and we anticipate that the product will be deactivated on or after October 1, 2024.

### [foundationConnect Retirement](#)

Salesforce is retiring foundationConnect. As part of this product retirement, the ability to renew subscriptions to this product will end on January 31, 2025, and the product will be deactivated on January 31, 2026.

## Nonprofit Cloud

Nonprofit Cloud enhancements make it easier to build integrations, to measure the ROI of upgraded campaigns by using a new way to attribute revenue on gift commitments, to improve digital fundraising and tracking with Outreach Source Code URLs, and to streamline donor support requests and accounting tasks by tracking payment data.

### [Quickly Build an Integration with Fundraising](#)

Third-party vendors can use the Business Process API to easily integrate their applications with Fundraising. They can easily maintain the integrations with a lower cost of ownership. They can match or create donor records, match or create recurring donations and installments, store payment data from externally processed gifts, link campaigns, source codes, and designations, add data to custom fields, and submit donation data in a single payload.

### [Split Gift Transaction Amount Attribution Across Multiple Campaigns](#)

Easily measure the long-term ROI of recurring gift upgrades by splitting the attribution of revenue on gift commitments between multiple campaigns.

### [Create Outreach Source Code URLs](#)

Digital Fundraisers can save time by automatically generating unique URLs based on user-defined UTM parameters that can be shared across various channels. Use these unique web links to tie an online donation back to the outreach source code and to track the effectiveness of online outreach.

### [Track Payment Data](#)

Streamline donor support requests, track processing fees, easily reconcile accounting, and manage integrations with independent software vendors and gateways with improved methods to track payment data (including payment method details, transaction fees, and gateway and processor metadata).

### [Import Data with CSV Data Management for Industries](#)

Reduce manual data entry and the risk of errors by using CSV files to import data into Nonprofit Cloud objects. Import large volumes of data to Salesforce by using a gift batch and the CSV Data Management common component.

### [Do More With Program and Case Management in Experience Cloud](#)

The Program and Case Management for Experience Cloud permission set now includes the create, read, update, and delete permissions for more Program and Case Management objects. Look at the permission set in your org for details.

### [New and Changed Objects in Nonprofit Cloud](#)

Do more with the new and updated Nonprofit Cloud objects.

### [New and Updated Connect APIs](#)

Make the most of the new and updated Connect APIs in Nonprofit Cloud.

## **New and Enhanced Common Features for Industries**

Nonprofit Cloud includes some features that are available across the clouds and products in Industries. Use these features to extend and customize Nonprofit Cloud as per your business needs.

- [Action Launcher](#)

Deliver better donor support by adding actions in the Action Launcher Lightning Web Component to launch actions to resolve donor requests. Administrators can now customize the title shown on the Action Launcher component to provide a more branded experience.

- [Bulk Action Panel](#)

Administrators can further streamline fundraising operations by adding bulk actions to the Bulk Action Panel, which are specific to an actionable list.

- [Grantmaking](#)

In Nonprofit Cloud for Grantmaking, Grant seekers can now add collaborators to help with grant applications in an Experience Cloud site. Grant makers and recipients can now see the difference between planned and actual budget spent. Grant makers can add invitation-only application funding opportunities to Experience Cloud.

- [Outcome Management](#)

Take the manual work out of adding indicator results and ensure that results are measured consistently with a flow. Collaborate with partner organizations and grantees in Experience Cloud. Connect Outcome Management to care plans in Case Management.

- [Timeline](#)

Fundraising admins can configure Timeline to show engagement events from a specific data space in Data Cloud.

## Quickly Build an Integration with Fundraising

Third-party vendors can use the Business Process API to easily integrate their applications with Fundraising. They can easily maintain the integrations with a lower cost of ownership. They can match or create donor records, match or create recurring donations and installments, store payment data from externally processed gifts, link campaigns, source codes, and designations, add data to custom fields, and submit donation data in a single payload.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Fundraising is enabled.

**Who:** Users with the FundraisingAccess permission set can access Nonprofit Cloud for Fundraising.

**Why:** The Business Process API is an investment in partners to make faster and easier integrations with Nonprofit Cloud.

**How:** Use the Business Process Connect API endpoints to access the Business Process API tool.

SEE ALSO:

[Salesforce Help: Fundraising Business APIs \(can be outdated or unavailable during release preview\)](#)

## Split Gift Transaction Amount Attribution Across Multiple Campaigns

Easily measure the long-term ROI of recurring gift upgrades by splitting the attribution of revenue on gift commitments between multiple campaigns.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Fundraising is enabled.

**Who:** Users with the FundraisingAccess permission set can access the Nonprofit Cloud for Fundraising applications.

**Why:** Attribute a transaction to multiple campaigns in the ratio in which the campaigns influenced the transaction amount to calculate the long-term ROI of upgraded recurring donations.

SEE ALSO:

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

## Create Outreach Source Code URLs

Digital Fundraisers can save time by automatically generating unique URLs based on user-defined UTM parameters that can be shared across various channels. Use these unique web links to tie an online donation back to the outreach source code and to track the effectiveness of online outreach.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Fundraising is enabled.

**Who:** Users with the FundraisingAccess permission set can access Nonprofit Cloud for Fundraising.

SEE ALSO:

[Salesforce Help: Turn on Fundraising \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Use Outreach Source Code URLs \(can be outdated or unavailable during release preview\)](#)

## Track Payment Data

Streamline donor support requests, track processing fees, easily reconcile accounting, and manage integrations with independent software vendors and gateways with improved methods to track payment data (including payment method details, transaction fees, and gateway and processor metadata).

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Fundraising is enabled.

**Who:** Users with the FundraisingAccess permission set can access Nonprofit Cloud for Fundraising.

SEE ALSO:

[Salesforce Help: Manage Gift Commitments \(can be outdated or unavailable during release preview\)](#)

## Import Data with CSV Data Management for Industries

Reduce manual data entry and the risk of errors by using CSV files to import data into Nonprofit Cloud objects. Import large volumes of data to Salesforce by using a gift batch and the CSV Data Management common component.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Nonprofit Cloud is enabled.

**When:** This feature is available by April 12, 2024.

**Who:** Users with the Basic CSV Data Import permission set or the Basic Csv Data Import User Permission system permission can access CSV Data Management.

**Why:** Fundraising users can import gift data to a gift batch and then process the batch to create gift transactions and related records. Program and case management users can import a large volume of data, such as inbound referrals.

SEE ALSO:

[Salesforce Help: Import Gift Entries to a Gift Batch by Using CSV Data Management for Industries\(can be outdated or unavailable during release preview\)](#)

## Do More With Program and Case Management in Experience Cloud

The Program and Case Management for Experience Cloud permission set now includes the create, read, update, and delete permissions for more Program and Case Management objects. Look at the permission set in your org for details.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Program Management is enabled.

**How:** To enhance or mute the permissions in the Program and Case Management for Experience Cloud permission set, add the Program and Case Management for Experience Cloud permission set to a permission set group that includes your own permission sets and assign the permission set group to your users.

## New and Changed Objects in Nonprofit Cloud

Do more with the new and updated Nonprofit Cloud objects.

### Store payment method details to complete transactions

Use the new `PaymentInstrument` object.

### Log Gift Commitment changes to track commitment upgrades and downgrades

Use the new `GiftCmtChangeAttrLog` object.

**Set UTM parameters with new fields on the Fundraising Configuration object for tracking an Outreach Source Code URL**

Use the new fields `UTMSource`, `UTMMedium`, and `DonorMatchingMethod` on the `FundraisingConfiguration` object.

**Create unique digital fundraising messages and track the success of the outreach**

Use the new fields `Source CodeBaseUrl`, `SourceCodeUrl`, `MessageChannel`, `MessageChannelPlatform`, `MessageChannelPlatformAccount`, `MessageTitle`, and `Message Content` on the `OutreachSourceCode` object.

**Enter payment identification information from the payment instrument for gift entry**

Use the new fields `Last4`, `ExpiryMonth`, and `ExpiryYear` on the `GiftEntry` object.

**See processor fees and gateway information and fees to inform refunds**

Use the new fields `GatewayTransactionFee`, `ProcessorTransactionFee`, `LastGatewayResponseCode`, `LastGatewayErrorMessage`, and `LastGatewayProcessedDate` on the `GiftRefund` object.

**See payment and outreach source code information to track changes on the commitment**

Use the new fields `OutreachSourceCode`, `ProcessorReference`, and `PaymentInstrument` on the `GiftCommitmentSchedule` object.

**Log payment gateway and processor information to track fees, references, error messages, and processed date**

Use the new fields `PaymentInstrument`, `GatewayTransactionFee`, `ProcessorTransactionFee`, `TotalTransactionFee`, `ProcessorReference`, `GatewayReference`, `LastGatewayResponseCode`, `LastGatewayErrorMessage`, and `LastGatewayProcessedDate` on the `GiftTransaction` object.

**Track the aggregated amount of a commitment that's upgraded with a donation to an additional campaign**

Use the new field `AttributedAmount` on the `OutreachSummary` object.

SEE ALSO:

[Salesforce Help: Fundraising Standard Objects](#)(can be outdated or unavailable during release preview)

## New and Updated Connect APIs

Make the most of the new and updated Connect APIs in Nonprofit Cloud.

### Business Process API Endpoints

**Create Gift Transactions with the Donor, Payment Instrument, and optionally Designations**

Make a POST request to the new `/connect/fundraising/gifts` resource.

New request body: Create Gift Input

New response body: Create Gift Output

**Create a Gift Commitment, Schedule, Payment Instrument, and optionally Default Designations**

Make a POST request to the new `/connect/fundraising/commitments` resource.

New Request body: Create Commitment Input

New Response body: Create Commitment Output

**Modify the Schedule of an existing Gift Commitment**

Make a POST request to the new `/connect/fundraising/commitments/{commitmentId}` resource.

New request body: Update Commitment Input

New response body: Update Commitment Output



**Update the transaction status and payment information for a collection of Gift Transactions**

Make a POST request to the existing `/connect/fundraising/transactions/payment-updates` resource.

New request body: Transaction Payment Updates Input

New response body: Transaction Payment Updates Output

**Update the future payment information for a collection of Gift Commitments**

Make a POST request to the existing `/connect/fundraising/commitments/payment-updates` resource.

New request body: Commitment Payment Updates Input

New response body: Commitment Payment Updates Output

**Find and Fix Potential Duplicates in Nonprofit Success Pack (Managed Package)**

Review, select, and merge potential duplicate contacts on the NPSP Contact Merge page. Use the new NPSP Potential Duplicates Lightning Web Component to go to the NPSP Contact Merge page. This feature replaces the standard Potential Duplicates component on the Contact page. We delivered this feature thanks to your ideas on IdeaExchange.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions with the NPSP managed package version 2.228.

SEE ALSO:

[Salesforce Help: Find and Merge Duplicate Contacts](#)(can be outdated or unavailable during release preview)

**Security Enhancements for Volunteers for Salesforce (Managed Package)**

Volunteers for Salesforce is now more secure thanks to small updates.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions with the Volunteers for Salesforce managed package.

**Why:** For technical details, see the [Volunteers for Salesforce GitHub repository](#).

**Connect REST APIs**

Connect REST APIs for Fundraising enables ISV to integrate with Salesforce software and UIs, enhance digital fundraising capabilities, and improve tracking of gift commitments and transactions.

[New Connect REST API Resources](#)

These resources reflect changes to the Nonprofit Cloud's Fundraising APIs.

**New Connect REST API Resources**

These resources reflect changes to the Nonprofit Cloud's Fundraising APIs.

**Modify the schedule or payment instrument details of an active gift commitment**

Make a PATCH request to the new `/connect/fundraising/commitments/{commitmentId}` resource.

New request body: Update Commitment Input

New response body: Update Commitment

### Create recurring gift commitments and schedules along with the associated donor, designations, and first transaction payment details

Make a POST request to the new `/connect/fundraising/commitments` resource.

New request body: Create Commitment Input

New response body: Create Commitment

### Update the future payment instrument metadata for active gift commitments

Make a POST request to the new `/connect/fundraising/commitments/payment-updates` resource.

New request body: Commitment Payment Updates Input

New response body: Commitment Payment Updates

### Update the gateway and processor metadata for gift transactions

Make a POST request to the new `/connect/fundraising/transactions/payment-updates` resource.

New request body: Transaction Payment Updates Input

New response body: Transaction Payment Updates

### Create gift transactions with related new or matched donor, optional transaction designations, and payment instrument metadata

Make a POST request to the new `/connect/fundraising/gifts` resource.

New request body: Create Gift Input

New response body: Create Gift

#### SEE ALSO:

[Nonprofit Cloud Developer Guide: Fundraising](#)(can be outdated or unavailable during release preview)

## Elevate Retirement

Salesforce is retiring the Elevate family of products. This affects Elevate Advanced Edition, Elevate Power of Us Editions, and all add-ons. As part of this product retirement, the ability to renew subscriptions to this product will end on October 1, 2023, and we anticipate that the product will be deactivated on or after October 1, 2024.

**Where:** This change applies to all Elevate products and editions.

## foundationConnect Retirement

Salesforce is retiring foundationConnect. As part of this product retirement, the ability to renew subscriptions to this product will end on January 31, 2025, and the product will be deactivated on January 31, 2026.

**Where:** This change applies to all foundationConnect products and editions.

**Why:** Grantmaking is available as a new product option. Learn more in [Introduction for Grantmaking](#) and contact your Account Executive with any questions.

## Vlocity Contract Lifecycle Management

Vlocity Contract Lifecycle Management (CLM) empowers businesses to generate and maintain accurate contracts associated with opportunities, orders, and quotes. Vlocity CLM seamlessly integrates with Salesforce Lightning Experience. In the Lightning Experience, Lightning actions such as Create Contract, Update Contract, and Pick Frame Contract are available on opportunities, orders, and quotes.

Learn about what's in this release in the [Vlocity Contract Lifecycle Management 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 filtering and performance for the data processing engine, improved monitoring for branch management, added decision tables to flows, provided templates for rebate management, added invocable actions and Apex classes for loyalty management, and much more.

### [AI Accelerator](#)

Create use cases in AI Accelerator by using Data Cloud as the prediction platform. Available only for users with the Data Cloud Starter license.

### [Action Launcher](#)

Contact center agents can quickly resolve customer requests by launching button- and link-based actions. Administrators can now customize the title shown on the Action Launcher component. If out-of-the-box deployments are available, Administrators can use them right away to configure Action Launcher.

### [Actionable Segmentation](#)

Use predefined Data Processing Engine definitions to create actionable list definitions easily and quickly. To help list creators easily filter dataset records to add to their actionable lists, set the filter input format for the applicable dataset columns as Multi-Select Picklist. List creators can now use filter templates to save the time and effort required to filter dataset records.

### [Batch Management](#)

Select records from big objects to run batch jobs in Batch Management.

### [Bulk Action Panel](#)

Administrators can now add bulk actions to Bulk Action Panel, which are specific to an actionable list.

### [Business Rules Engine](#)

Call the ready-to-use executable expression set templates from flows. Create precise rules with the operators and functions that consider null values. Use the enhancements in decision tables to simplify and streamline lookups. Show your users more targeted and nuanced explanations for expression set version step results with the enhancements in Decision Explainer.

### [Context Service](#)

Extend the standard context definitions that are shipped with your Industries solutions to create custom definitions that suit your business requirements. To upgrade the standard definition components that are used in the extended custom definitions, effortlessly sync the custom definitions.

### [Criteria-Based Search and Filter](#)

Help users run more targeted searches by configuring additional filter fields and filtering by field values or grouping and aggregation. Enrich search results by displaying them in a user-friendly card format.

### [CSV Data Management for Industries](#)

Get ready-to-use data in your apps faster using the new CSV Data Management tool. With just a few clicks you can easily import large amounts of data in to Salesforce objects, reducing manual data entry and the risk of errors. Prepare and upload your CSV file, map columns to Salesforce objects, validate your data to ensure frictionless import, and download import log files.

### [Data Processing Engine](#)

Enjoy more Data Cloud flexibility in your definitions with more objects types to choose from in data source and writeback nodes. Choose Data Cloud Data Spaces for your definition. Troubleshoot quickly by restoring previous field selections in your data source when you encounter an issue with a reference node. Upload CSV file data and write it back to an entity in Salesforce.

### [Discovery Framework](#)

Designate specific questions to prefill with data from previous assessment responses. If internal users aren't ready to submit an assessment, they can save it as a draft to complete at their convenience.

### Engagement

To get an object's record details in a flow, use the Get Record Details action.

### Grantmaking

Grant seekers can now add collaborators to help with grant applications in an Experience Cloud site. Grant makers and recipients can now see the difference between planned and actual budget spent. Grant makers can add invitation-only application funding opportunities to Experience Cloud.

### Intelligent Document Reader

Get Intelligent Document Reader to easily extract unstructured content and specific table information from uploaded documents.

### Intelligent Form Reader

Get Intelligent Form Reader to easily extract unstructured content and specific table information from uploaded documents.

### KPI Bar

Administrators can create custom key performance indicators (KPIs) for actionable lists. List Creators can customize KPI Bar by adding custom KPIs. List creators can now show or hide KPI Bar.

### List Builder for Data Cloud Segment

List creators must select a data space before selecting a data segment. The actionable list preview shows the default columns of the associated object. An email notification is sent to the list creator when an actionable list reaches 50,000 member records.

### Outcome Management

Take the manual work out of adding indicator results and ensure that results are measured consistently with a flow. Collaborate with partner organizations and grantees in Experience Cloud. Connect Outcome Management to care plans in Case Management.

### Scheduled Reminders

Send automated emails to remind users about important occurrences and occasions.

### Timeline

Configure Timeline to show engagement events from a specific data space in Data Cloud.

## AI Accelerator

Create use cases in AI Accelerator by using Data Cloud as the prediction platform. Available only for users with the Data Cloud Starter license.

### Enhance AI Capabilities for Sagemaker Integration

Enhance your AI capabilities by using Bring Your Own Model (BYOM) on Data Cloud for Sagemaker integration. Connect your Sagemaker model for predictive insights and align it with Next Best Action (NBA) for actionable predictions. Customize settings to create custom predictive models by using AI Accelerator. Create or edit a use case model on the AI Accelerator setup page with Data Cloud as the prediction platform.

## Enhance AI Capabilities for Sagemaker Integration

Enhance your AI capabilities by using Bring Your Own Model (BYOM) on Data Cloud for Sagemaker integration. Connect your Sagemaker model for predictive insights and align it with Next Best Action (NBA) for actionable predictions. Customize settings to create custom predictive models by using AI Accelerator. Create or edit a use case model on the AI Accelerator setup page with Data Cloud as the prediction platform.

**Where:** This change applies to the Lightning Experience for multiple Industries clouds.

**Who:** Users with any of the these licenses can configure use case models in AI Accelerator:

- CRM Analytics for Automotive

- CRM for Communications Cloud or Communications Cloud Intelligence
- CRM Analytics for Consumer Goods or Revenue Intelligence for Consumer Goods
- CRM for Energy and Utilities or Revenue Intelligence for Energy and Utilities
- CRM Analytics for Financial Services
- CRM Analytics for Healthcare
- CRM Analytics for Media or Revenue Intelligence for Media
- CRM Analytics for Manufacturing

Data Cloud customers can access this feature with the new Data Cloud Starter license. As per the data platform services card, customers can pay for Bring Your Own Model inferences based on usage.

## Action Launcher

Contact center agents can quickly resolve customer requests by launching button- and link-based actions. Administrators can now customize the title shown on the Action Launcher component. If out-of-the-box deployments are available, Administrators can use them right away to configure Action Launcher.

### [Streamline Customer Service by Quickly Launching Button- and Link-based Actions](#)

Button- and link-based actions in an org launch the actions available within Salesforce or integrate Salesforce data with external URLs, applications, or systems. Contact center agents can easily find these actions within Action Launcher. The actions are just a search and click away through Action Launcher.

### [Personalize Action Launcher](#)

Administrators can now tailor Action Launcher's user interface to their organization's preferences by customizing and localizing the title shown on Action Launcher. With the customized title, organizations can provide a branded experience to contact center agents.

### [Accelerate Action Launcher Configuration with Out-of-the-Box Deployments](#)

You can now effortlessly use out-of-the-box deployments to save the time and effort spent configuring Action Launcher for users. The deployments come preconfigured with context objects, actions, and frequently used actions, which you can easily modify to meet your organization's business requirements.

SEE ALSO:

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

## Streamline Customer Service by Quickly Launching Button- and Link-based Actions

Button- and link-based actions in an org launch the actions available within Salesforce or integrate Salesforce data with external URLs, applications, or systems. Contact center agents can easily find these actions within Action Launcher. The actions are just a search and click away through Action Launcher.

**Where:** This change applies to Experience Cloud and 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 the objects and the associated actions 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 **Action Launcher deployment** from the Action Launcher Configuration dropdown, and then select the deployment that you created from the Action Launcher Deployment dropdown. Save your changes, and then activate your page, if necessary.

## Personalize Action Launcher

Administrators can now tailor Action Launcher's user interface to their organization's preferences by customizing and localizing the title shown on Action Launcher. With the customized title, organizations can provide a branded experience to contact center agents.

**Where:** This change applies to Experience Cloud and Lightning Experience in clouds where Action Launcher is available.

**Who:** To use this feature, users need the Industry Service Excellence add-on license.

**How:** For personalizing Action Launcher in Lightning Experience in clouds, create a custom label. Specify the translation information for the supported languages. Add the Action Launcher component to the appropriate Lightning record page through Lightning App Builder. In component properties, select Action Launcher configuration, select a deployment or service catalog, and use the prescribed format to enter the custom label name in the Action Launcher Title field. Save your changes, and then activate your page, if necessary. For personalizing Action Launcher in Experience Cloud, add the Action Launcher component to the appropriate page. In component properties, enter the custom title in the Action Launcher Title field. Publish your changes.

## Accelerate Action Launcher Configuration with Out-of-the-Box Deployments

You can now effortlessly use out-of-the-box deployments to save the time and effort spent configuring Action Launcher for users. The deployments come preconfigured with context objects, actions, and frequently used actions, which you can easily modify to meet your organization's business requirements.

**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, select an out-of-the-box deployment and use it. The deployment is added to the Action Launcher Deployments list. Edit the deployment, if necessary.

## Actionable Segmentation

Use predefined Data Processing Engine definitions to create actionable list definitions easily and quickly. To help list creators easily filter dataset records to add to their actionable lists, set the filter input format for the applicable dataset columns as Multi-Select Picklist. List creators can now use filter templates to save the time and effort required to filter dataset records.

### [Create Actionable List Definitions Faster with Predefined Data Processing Engine Definitions](#)

Reduce the time and effort required to create actionable list definitions by using existing Data Processing Engine definitions. Previously, you created an actionable list definition only by creating a Data Processing Engine definition from scratch. To create actionable list definitions, use Data Processing Engine definitions with the Actionable List process type and the CRM Analytics Runtime platform.

### [Build More Flexible and Extensive Filters with Multi-Select Picklists](#)

When you edit dataset column formats, set the input type format as Multi-Select Picklist for the applicable dataset columns. List creators can now easily filter dataset records on the List Builder page by using the multi-select picklist to select up to five text values rather than typing text explicitly.

### [Reuse Filter Criteria with Filter Templates](#)

Use filter templates to save time and effort when creating actionable lists, and to leverage filtering strategies rather than defining filters from scratch. When creating actionable lists in List Builder, list creators can now save the filters that are used to filter dataset records as a template. List creators can reuse or customize these templates as per their business needs.

### [Get a Quick View of an Actionable List Member's Details](#)

Help your sales executives or managers quickly view an actionable list member's basic information at-a-glance in the Show List Member Details component. The Show List Member Details component shows information such as the member's name, phone number, address details, and the Action Launcher to quickly launch processes to create a case, lead, or any other record as per the business needs.

### [New and Changed Objects](#)

Access more data with these new and changed objects.

## Create Actionable List Definitions Faster with Predefined Data Processing Engine Definitions

Reduce the time and effort required to create actionable list definitions by using existing Data Processing Engine definitions. Previously, you created an actionable list definition only by creating a Data Processing Engine definition from scratch. To create actionable list definitions, use Data Processing Engine definitions with the Actionable List process type and the CRM Analytics Runtime platform.

**Where:** This change applies to Lightning Experience in clouds that have Industry Sales Excellence 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 Segmentation Settings page, click **Use Existing Data Processing Engine Definition**. Enter an actionable list definition name and the base object for creating the list definition. Search for and select a Data Processing Engine definition and click **Save**.

SEE ALSO:

[Salesforce Help: Create Actionable List Definitions \(can be outdated or unavailable during release preview\)](#)

## Build More Flexible and Extensive Filters with Multi-Select Picklists

When you edit dataset column formats, set the input type format as Multi-Select Picklist for the applicable dataset columns. List creators can now easily filter dataset records on the List Builder page by using the multi-select picklist to select up to five text values rather than typing text explicitly.

**Where:** This change applies to Lightning Experience in clouds that have Industry Sales Excellence 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.

**Why:** The multi-select picklist format helps list creators select multiple distinct values more easily and quickly. For example, if the dataset column is Billing City, then list creators can select multiple values such as New York, Chicago, London, Delhi, or Singapore to filter accounts. The filter returns the accounts with only the specified billing cities.

**How:** On the Actionable Segmentation Settings page, from the actionable list definition's actions, select **Edit Column Display Format**. Select **Multi-Select Picklist** as the filter input format for the columns that have scope for multiple value selections and click **Save**.

SEE ALSO:

[Salesforce Help: Set the Display Format for Actionable List Columns \(can be outdated or unavailable during release preview\)](#)

## Reuse Filter Criteria with Filter Templates

Use filter templates to save time and effort when creating actionable lists, and to leverage filtering strategies rather than defining filters from scratch. When creating actionable lists in List Builder, list creators can now save the filters that are used to filter dataset records as a template. List creators can reuse or customize these templates as per their business needs.

**Where:** This change applies to Lightning Experience in clouds that have Industry Sales Excellence 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, create an actionable list and define filters and filter logic to suit your business needs. Then click **Apply**. Before you select and add records from the filtered list to the actionable list, click **Save as Template** to save these filters as a template.

SEE ALSO:


[Salesforce Help: Create a Custom Filter Logic \(can be outdated or unavailable during release preview\)](#)

## Get a Quick View of an Actionable List Member's Details

Help your sales executives or managers quickly view an actionable list member's basic information at-a-glance in the Show List Member Details component. The Show List Member Details component shows information such as the member's name, phone number, address details, and the Action Launcher to quickly launch processes to create a case, lead, or any other record as per the business needs.

**Where:** This change applies to Lightning Experience in clouds that have Industry Sales Excellence 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 details page, in the Preview Details column, click  to view the actionable list member's details.

SEE ALSO:

[Salesforce Help: View Actionable List Members \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Add Show List Member Details to a Page \(can be outdated or unavailable during release preview\)](#)

## New and Changed Objects

Access more data with these new and changed objects.

### Store a logical expression containing filter conditions to include or exclude data from the dataset that's associated with the actionable list definition

Use the new `ActionableListDefFltrCrit` object.

### Store the filter condition for including or excluding data from the dataset associated with the actionable list definition

Use the new `ActionableListDefFltrCond` object.

### Verify if the filter input format is enabled to select multiple values from a picklist

Use the new `isTypeAheadSearchEnabled` field on the `ActionableListDatasetColumn` object.

SEE ALSO:

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

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

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

## Batch Management

Select records from big objects to run batch jobs in Batch Management.

### [Batch Management Big Objects Support](#)

Run batch jobs in Batch Management by selecting records from big objects. Big objects store and manage massive amounts of data on the Salesforce platform.



## Batch Management Big Objects Support

Run batch jobs in Batch Management by selecting records from big objects. Big objects store and manage massive amounts of data on the Salesforce platform.

**Where:** This change applies to Lightning Experience in Enterprise, Developer, and Unlimited editions where Rebate Management, Manufacturing Cloud, or Loyalty Management is enabled.

**How:** The big object Batch Management functionality is available through the Batch Management Tooling API.

## Bulk Action Panel

Administrators can now add bulk actions to Bulk Action Panel, which are specific to an actionable list.

### [Streamline the List Creator Workflow with Contextual Bulk Actions](#)

Administrators can now create bulk action configurations containing screen type flows and Lightning web component actions. The bulk action configurations integrate with actionable lists to show list-specific bulk actions on Bulk Action Panel. With contextual bulk actions, Bulk Action Panel adapts to an actionable list and provides a tailored user experience to list creators. Improve the productivity of list creators by providing the easily accessible and relevant bulk actions on Bulk Action Panel.

### [Changed Object in Bulk Action Panel](#)

Use the changed object for creating bulk action configurations.

### SEE ALSO:

[Salesforce Help: Bulk Action Panel \(can be outdated or unavailable during release preview\)](#)

## Streamline the List Creator Workflow with Contextual Bulk Actions

Administrators can now create bulk action configurations containing screen type flows and Lightning web component actions. The bulk action configurations integrate with actionable lists to show list-specific bulk actions on Bulk Action Panel. With contextual bulk actions, Bulk Action Panel adapts to an actionable list and provides a tailored user experience to list creators. Improve the productivity of list creators by providing the easily accessible and relevant bulk actions on Bulk Action Panel.

**Where:** This change applies to Lightning Experience in clouds where Actionable List Members and Bulk Action Panel are available.

**Who:** To create bulk action configurations, administrators need the Industry Sales Excellence add-on license and the Actionable Segmentation permission set.

**How:** From Setup, in the Quick Find box, enter *Bulk Action Configurations*, and then click **Bulk Action Configurations**. Next, click **New**, enter a name and description, select the objects and the associated actions that you want to include in the configuration, select the actions that you want to show on Bulk Action Panel, and save your changes.

## Changed Object in Bulk Action Panel

Use the changed object for creating bulk action configurations.

### **Specify the name of the component used in the deployment**

Use the new supported enum value `Bulk Action Panel` in the existing `ComponentName` field on the `RecordActionDeployment` object.

## Business Rules Engine

Call the ready-to-use executable expression set templates from flows. Create precise rules with the operators and functions that consider null values. Use the enhancements in decision tables to simplify and streamline lookups. Show your users more targeted and nuanced explanations for expression set version step results with the enhancements in Decision Explainer.

### [Use a Template to Invoke Expression Sets from a Flow](#)

Save time and effort with ready-to-use executable expression set templates. Executable expression sets are active, so you can call them from flows or use them as subexpressions without additional effort. Previously, expression set templates were inactive and read-only.

### [Create Precise Rules with Null Operators and Functions](#)

Simplify condition creation and data validation in expression sets by using the Is Null or Is Not Null operator in a condition or list filter element. Get more accurate information by explicitly checking whether a variable has no value, and ensure that specific criteria are being met. Use the ISNULL and ISNOTNULL functions in a calculation formula to verify whether a variable's value is null. Previously, if a variable had no value, a default value was assigned when the expression set was run. The null operators and functions are available only if an expression set's usage type supports them.

### [Add Business Elements to a List Group](#)

Use a business element inside a list group to perform complex, business-specific operations defined in the element on the items in the list. Previously, list groups supported only list filter, calculation, and lookup table elements. You can add a business element to a list group only if your Salesforce org has business elements.

### [Decision Tables](#)

Define more complex and specific rules with decision tables and streamline lookups.

### [Decision Explainer for Expression Sets](#)

Provide more consistent and nuanced explanations to your users on why a step in an expression set version generated a specific result.

### [Work with Expression Sets Efficiently with the Enhanced Expression Set Builder](#)

Create, edit, and manage your expression sets quickly and with greater ease. Load the steps in your expression set versions up to 10 times faster. Enjoy more responsive interactions with the builder canvas when you add, delete, cut, or copy steps, or even when you undo or redo an action on the canvas.

### [Permission Set Changes to Enable List Variable Usage in Expression Sets](#)

Use context tags as list variables in expression set versions with the Rule Engine Designer and Context Service Admin permission sets. Previously, you needed the Rule Engine Advanced Designer permission set to access context tags in expression sets. Now users with the Context Service Admin permission set can create and activate a context definition. Users with the Rule Engine Designer permission set can use context definition tags as list variables in expression set versions and also access the list group step element.

### [Changed Business Rules Engine Object](#)

Do more with this changed object in Business Rules Engine.

### [Changed Business Rules Engine Tooling API Objects](#)

Do more with these changed tooling API objects in Business Rules Engine.

### [Connect REST APIs](#)

Connect REST APIs for Business Rules Engine help customers, partners, and ISVs integrate with Salesforce software and UIs.

## Use a Template to Invoke Expression Sets from a Flow

Save time and effort with ready-to-use executable expression set templates. Executable expression sets are active, so you can call them from flows or use them as subexpressions without additional effort. Previously, expression set templates were inactive and read-only.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions for Industries clouds where Business Rules Engine is enabled.

**Who:** If an executable expression set template is available in a Salesforce org, users with the Rule Engine Designer permission set can save it as an expression set or a version of an expression set. To call an executable template from a flow, users need the Manage Flows permission set.

**How:** In Business Rules Engine, select **Expression Set Templates**. Templates that are marked as Executable are ready to be used in flows or as subexpressions.

SEE ALSO:

[Salesforce Help: Expression Set Templates \(can be outdated or unavailable during release preview\)](#)

## Create Precise Rules with Null Operators and Functions

Simplify condition creation and data validation in expression sets by using the Is Null or Is Not Null operator in a condition or list filter element. Get more accurate information by explicitly checking whether a variable has no value, and ensure that specific criteria are being met. Use the ISNULL and ISNOTNULL functions in a calculation formula to verify whether a variable's value is null. Previously, if a variable had no value, a default value was assigned when the expression set was run. The null operators and functions are available only if an expression set's usage type supports them.

**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 Operators and Functions in Expression Sets \(can be outdated or unavailable during release preview\)](#)

## Add Business Elements to a List Group

Use a business element inside a list group to perform complex, business-specific operations defined in the element on the items in the list. Previously, list groups supported only list filter, calculation, and lookup table elements. You can add a business element to a list group only if your Salesforce org has business elements.

**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: List Group and List Filter \(can be outdated or unavailable during release preview\)](#)

## Decision Tables

Define more complex and specific rules with decision tables and streamline lookups.

### [Simplify Decision Table Lookups with Enhanced Field Grouping](#)

You can now group decision table rows by up to two input fields even when the table's input condition logic uses the OR condition or a custom condition logic. The OR operator gives you more control over decision outcomes when multiple conditions contribute to a decision. Previously, grouping was supported only if the input condition logic used the AND operator.

### [Include Null Values in Lookups to Streamline Results](#)

Narrow your search results by specifying null as a lookup value when using Connect REST APIs for decision table lookups. Previously, because null wasn't considered an independent value, the lookup returned combined results for matching values and null values, resulting in a larger volume of data.

## Simplify Decision Table Lookups with Enhanced Field Grouping

You can now group decision table rows by up to two input fields even when the table's input condition logic uses the OR condition or a custom condition logic. The OR operator gives you more control over decision outcomes when multiple conditions contribute to a decision. Previously, grouping was supported only if the input condition logic used the AND operator.

**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: How Grouping Works in Decision Tables \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Considerations for Creating Decision Tables \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Business Rules Engine Default Limits \(can be outdated or unavailable during release preview\)](#)

## Include Null Values in Lookups to Streamline Results

Narrow your search results by specifying null as a lookup value when using Connect REST APIs for decision table lookups. Previously, because null wasn't considered an independent value, the lookup returned combined results for matching values and null values, resulting in a larger volume of data.

**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: Considerations for Creating Decision Tables \(can be outdated or unavailable during release preview\)](#)

## Decision Explainer for Expression Sets

Provide more consistent and nuanced explanations to your users on why a step in an expression set version generated a specific result.

### [Narrow Down Search Results for Explainability Set Message Templates](#)

Assign usage types to explainability message templates and help rule designers quickly locate the relevant template when they add an explanation for the outcome of an expression set version step. Search shows only the templates that share the expression set's usage type and the templates that don't have a usage type. Previously, Search showed all the templates specific to a step type and result type.

### [Show Users Decision Explanations for Steps That Use List Variables](#)

Provide your users decision explanations of results in an expression set version step for any type of variable used. You can now map expression set tokens in an explainability message template to list variables. Previously, mapping was supported for only local resources and field aliases.

### [Explain Why a Decision Matrix Has No Result](#)

Create explainability message templates for scenarios when a decision matrix in a lookup table step doesn't yield a result. Rule designers can then assign the templates to lookup table steps in expression set versions. Previously, you could create a message template for the No Result result type only for decision tables.

### [Show Users Explanations for Business Element Results](#)

Simplify rule outcomes for your users by providing explanations for why the business elements used in your expression set versions gave a specific result. You can now create explainability message templates for a business element's result. A rule designer can then add the message templates to a business element step in an expression set version.

SEE ALSO:

[Salesforce Help: Decision Explainer for Expression Sets \(can be outdated or unavailable during release preview\)](#)

### Narrow Down Search Results for Explainability Set Message Templates

Assign usage types to explainability message templates and help rule designers quickly locate the relevant template when they add an explanation for the outcome of an expression set version step. Search shows only the templates that share the expression set's usage type and the templates that don't have a usage type. Previously, Search showed all the templates specific to a step type and result type.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions for Industries clouds where Business Rules Engine and Decision Explainer are enabled.

**Who:** Users with the Decision Explainer Service Access permission set can create explainability message templates. Users with the Rule Engine Designer permission set can reference the templates in expression set version steps.

SEE ALSO:

[Salesforce Help: Decision Explainer for Expression Sets \(can be outdated or unavailable during release preview\)](#)

### Show Users Decision Explanations for Steps That Use List Variables

Provide your users decision explanations of results in an expression set version step for any type of variable used. You can now map expression set tokens in an explainability message template to list variables. Previously, mapping was supported for only local resources and field aliases.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions for Industries clouds where Business Rules Engine and Decision Explainer are enabled.

**Who:** Users with the Decision Explainer Service Access permission set can create expression set tokens and use them in explainability message templates. Users with the Rule Engine Designer permission set can map the tokens in the templates to list variables in an expression set version.

### Explain Why a Decision Matrix Has No Result

Create explainability message templates for scenarios when a decision matrix in a lookup table step doesn't yield a result. Rule designers can then assign the templates to lookup table steps in expression set versions. Previously, you could create a message template for the No Result result type only for decision tables.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions for Industries clouds where Business Rules Engine and Decision Explainer are enabled.

**Who:** Users with the Decision Explainer Service Access permission set can create explainability message templates. Users with the Rule Engine Designer permission set can reference the templates in expression set version steps.

**How:** To create a template, from Setup, search for and select **Explainability Message Template**. For Expression Set Step Type, select **Decision Matrix Lookup**. For Result Type, select **No Result**.

SEE ALSO:

[Salesforce Help: Decision Explainer for Expression Sets \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Show Rule Explanations to Users \(can be outdated or unavailable during release preview\)](#)

## Show Users Explanations for Business Element Results

Simplify rule outcomes for your users by providing explanations for why the business elements used in your expression set versions gave a specific result. You can now create explainability message templates for a business element's result. A rule designer can then add the message templates to a business element step in an expression set version.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions for Industries clouds where Business Rules Engine and Decision Explainer are enabled.

## Work with Expression Sets Efficiently with the Enhanced Expression Set Builder

Create, edit, and manage your expression sets quickly and with greater ease. Load the steps in your expression set versions up to 10 times faster. Enjoy more responsive interactions with the builder canvas when you add, delete, cut, or copy steps, or even when you undo or redo an action on the canvas.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions for Industries clouds where Business Rules Engine is enabled.

## Permission Set Changes to Enable List Variable Usage in Expression Sets

Use context tags as list variables in expression set versions with the Rule Engine Designer and Context Service Admin permission sets. Previously, you needed the Rule Engine Advanced Designer permission set to access context tags in expression sets. Now users with the Context Service Admin permission set can create and activate a context definition. Users with the Rule Engine Designer permission set can use context definition tags as list variables in expression set versions and also access the list group step element.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions for Industries clouds where Business Rules Engine and Context Service are enabled.

## Changed Business Rules Engine Object

Do more with this changed object in Business Rules Engine.

### Specify a usage type for an expression set definition

Use the new `UsageType` field on the `ExpressionSetView` object.

### Determine whether an expression set template is executable

Use the new `IsExecutable` field on the `ExpressionSetView` object.

### Determine whether an executable expression set template references an executable context definition

Use the new `HasContextDefinitionRef` field on the `ExpressionSetView` object.

## Changed Business Rules Engine Tooling API Objects

Do more with these changed tooling API objects in Business Rules Engine.

## New Fields on Decision Explainer

### Specify the explainability message template's usage type

Use the new `EmtUsageType` field on the existing `ExplainabilityMsgTemplate` object.

## New Fields on Decision Table

### DoesConsiderNullValue

Use this new field to specify whether a column containing a null value is considered for lookup

### RefreshFailureReason

Use the new field to specify the reason for the refresh of the decision table data to fail.

### RefreshStatus

Use the new field to specify the refresh status of the cached data in a decision table.

SEE ALSO:

[Industries Common Resources Developer Guide: DecisionTable](#)

[Industries Common Resources Developer Guide: ExplainabilityMsgTemplate](#)

## Connect REST APIs

Connect REST APIs for Business Rules Engine help customers, partners, and ISVs integrate with Salesforce software and UIs.

### [New Connect REST API Resources](#)

These resources reflect changes in the Business Rule Engine.

### [Changed Connect REST API Request Bodies](#)

This request body has changes.

### [Changed Connect REST API Response Bodies](#)

This response body has changes.

## New Connect REST API Resources

These resources reflect changes in the Business Rule Engine.

### Identify the request's source via the business knowledge model name

Make a GET request to the existing `/connect/business-rules/lookup-tables` resource.

New request parameter: `businessKnowledgeModelName`

## Changed Connect REST API Request Bodies

This request body has changes.

Decision Table Definitions

### Decision Table Definition Input

This request body has this new property.

- `doesConsiderNullValue`—Indicates whether a column that has a null value is considered for lookup (`true`) or not (`false`).

SEE ALSO:

[Industries Common Resources Developer Guide: Decision Table Definition Input](#)

## Changed Connect REST API Response Bodies

This response body has changes.

Decision Table Definitions

### Decision Table Definition Output

This response body has this new property.

- `doesConsiderNullValue`—Indicates whether a column that has a null value is considered for lookup (`true`) or not (`false`).

### Simulation Step Explainability Message Output

This response body has this new property.

- `contextTagMessages`—Explainability messages of a step when context tags are used in a step.

SEE ALSO:

[Industries Common Resources Developer Guide: Decision Table Definition Output](#)

## Context Service

Extend the standard context definitions that are shipped with your Industries solutions to create custom definitions that suit your business requirements. To upgrade the standard definition components that are used in the extended custom definitions, effortlessly sync the custom definitions.

### [Extend and Seamlessly Enhance Standard Definitions](#)

Extend a standard definition and build on top of it. The extended definition retains components such as nodes, attributes, and mappings from the source standard definition. Retain standard components to save the time and effort needed to duplicate the components.

### [Easily Sync an Extended Custom Definition](#)

Use the Sync option for extended context definitions to instantly upgrade the standard components used in an extended definition to their latest version. The Sync option is available only for extended custom definitions.

### [Other Context Service Enhancements](#)


Use the new Edit button on a context definition's details page to conveniently edit the definition. Previously, to edit a definition, you selected Edit from the definition's actions. Quickly find a standard or a custom definition from the new Custom Definitions and Standard Definitions tabs. Previously, all definitions were listed on a single page. Clearly see the connection between a node or an attribute and the object or the field that it's mapped to.

## Extend and Seamlessly Enhance Standard Definitions

Extend a standard definition and build on top of it. The extended definition retains components such as nodes, attributes, and mappings from the source standard definition. Retain standard components to save the time and effort needed to duplicate the components.



**Where:** This change applies to Lightning Experience in Professional, Enterprise, Unlimited, and Developer editions for Industries clouds where Context Service is enabled.

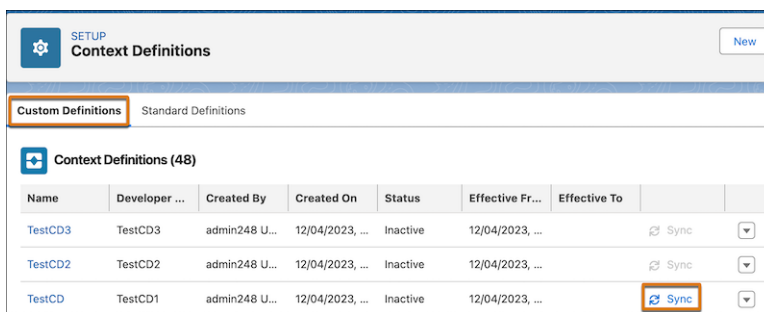
**How:** From Setup, in the Quick Find box, enter *Context Definitions*, and select **Context Definitions**. On the Standard Definitions tab, click  for the standard definition that you want to extend, and select **Extend**.







## Easily Sync an Extended Custom Definition

Use the Sync option for extended context definitions to instantly upgrade the standard components used in an extended definition to their latest version. The Sync option is available only for extended custom definitions.

**Where:** This change applies to Lightning Experience in Professional, Enterprise, Unlimited, and Developer editions for Industries clouds where Context Service is enabled.

**How:** From Setup, in the Quick Find box, enter *Context Definitions*, and select **Context Definitions**. On the Custom Definitions tab, select a definition, and then click **Sync**.



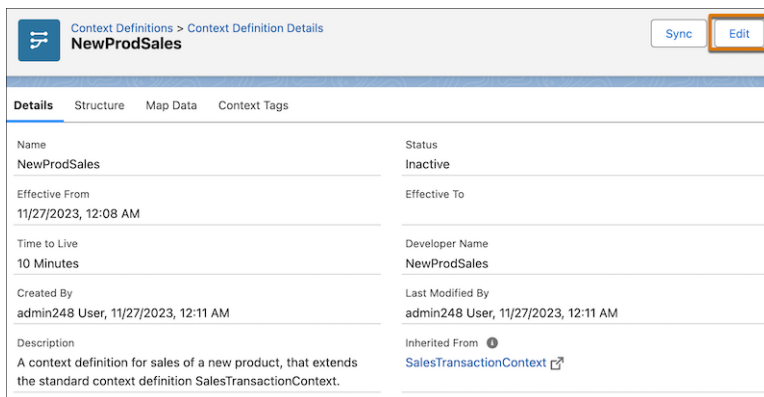
Name	Developer ...	Created By	Created On	Status	Effective Fr...	Effective To		
TestCD3	TestCD3	admin248 U...	12/04/2023, ...	Inactive	12/04/2023, ...			
TestCD2	TestCD2	admin248 U...	12/04/2023, ...	Inactive	12/04/2023, ...			
TestCD	TestCD1	admin248 U...	12/04/2023, ...	Inactive	12/04/2023, ...			


## Other Context Service Enhancements

Use the new Edit button on a context definition's details page to conveniently edit the definition. Previously, to edit a definition, you selected Edit from the definition's actions. Quickly find a standard or a custom definition from the new Custom Definitions and Standard Definitions tabs. Previously, all definitions were listed on a single page. Clearly see the connection between a node or an attribute and the object or the field that it's mapped to.

**Where:** This change applies to Lightning Experience in Professional, Enterprise, Unlimited, and Developer editions for Industries clouds where Context Service is enabled.

**How:** To edit a definition from the definition's details page, click **Edit**.

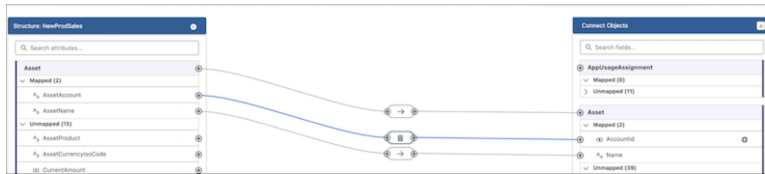


Context Definition Details	
Name	NewProdSales
Status	Inactive
Effective From	11/27/2023, 12:08 AM
Effective To	
Time to Live	10 Minutes
Developer Name	NewProdSales
Created By	admin248 User, 11/27/2023, 12:11 AM
Last Modified By	admin248 User, 11/27/2023, 12:11 AM
Description	A context definition for sales of a new product, that extends the standard context definition SalesTransactionContext.
Inherited From	

To view the custom definitions and standard definitions in your Salesforce org, switch between the Custom Definitions and Standard Definitions tabs, respectively.

Custom Definitions						
Standard Definitions						
<b>Context Definitions (3)</b>						
Name	Developer ...	Created By	Created On	Status	Effective Fr...	Effective To
SalesTransactionContext	SalesTransac...	Automated P...	05/10/2023, ...	Active	05/10/2023, ...	
ProductDiscoveryContext	ProductDisc...	Automated P...	12/11/2023, 5...	Active	12/11/2023, 5...	
FulfillmentTransactionContext	FulfillmentTr...	Automated P...	09/01/2022, ...	Active	09/01/2022, ...	

To clearly see the mapping for a node or an attribute, hover over the mapping.



## Criteria-Based Search and Filter

Help users run more targeted searches by configuring additional filter fields and filtering by field values or grouping and aggregation. Enrich search results by displaying them in a user-friendly card format.

### Display Search Results as Cards

Design a data-rich, visually engaging format for search results. Configure an OmniStudio FlexCard that includes the most important details for your users, and select it when you create a search criteria configuration. You can still use search criteria configurations that display search results in a list as well.

### Use More Search Result Filters

To help your users narrow down search results to the best possible match, you can now configure up to 20 search result filter fields, including text area fields. Users can filter the search results by using grouping and aggregation or by specifying field values. To use filter field values, specify the Filter Fields criteria type in your search criteria configuration.

### Filter Search Results by Fields with Multiple Values

Expand search result filter criteria by including filter fields that store more than one value. In a search criteria configuration, set up filter field parsing for text area fields with pipe-separated values. Criteria-Based Search and Filter performs special processing so that users can group and aggregate or filter search results by these fields.

### Changed Objects in Criteria-Based Search and Filter

Customize search criteria configurations with this changed object in Criteria-Based Search and Filter.

## Display Search Results as Cards

Design a data-rich, visually engaging format for search results. Configure an OmniStudio FlexCard that includes the most important details for your users, and select it when you create a search criteria configuration. You can still use search criteria configurations that display search results in a list as well.

**Where:** This change applies to Lightning Experience and Automotive Cloud, Health Cloud, Manufacturing Cloud, and Public Sector Solutions editions that support Criteria-Based Search and Filter.

**Who:** Users with the Criteria-Based Search and Filter system permission can configure and use criteria-based search and filter capabilities. Users with the OmniStudio Admin permission set can configure OmniStudio FlexCards.

SEE ALSO:

[Salesforce Help: Configure a Searchable Object \(can be outdated or unavailable during release preview\)](#)

## Use More Search Result Filters

To help your users narrow down search results to the best possible match, you can now configure up to 20 search result filter fields, including text area fields. Users can filter the search results by using grouping and aggregation or by specifying field values. To use filter field values, specify the Filter Fields criteria type in your search criteria configuration.

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**Who:** Users with the Criteria-Based Search and Filter system permission can configure and use criteria-based search and filter capabilities.

SEE ALSO:

[Salesforce Help: Configure a Searchable Object \(can be outdated or unavailable during release preview\)](#)

## Filter Search Results by Fields with Multiple Values

Expand search result filter criteria by including filter fields that store more than one value. In a search criteria configuration, set up filter field parsing for text area fields with pipe-separated values. Criteria-Based Search and Filter performs special processing so that users can group and aggregate or filter search results by these fields.

**Where:** This change applies to Lightning Experience and Automotive Cloud, Health Cloud, Manufacturing Cloud, and Public Sector Solutions editions that support Criteria-Based Search and Filter.

**Who:** Users with the Criteria-Based Search and Filter system permission can configure and use criteria-based search and filter capabilities.

SEE ALSO:

[Salesforce Help: Configure a Searchable Object \(can be outdated or unavailable during release preview\)](#)

## Changed Objects in Criteria-Based Search and Filter

Customize search criteria configurations with this changed object in Criteria-Based Search and Filter.

### **Specify the type of filter criteria to use for search, either grouping and aggregation or filter fields**

Use the new FilterType field in the SearchCriteriaConfiguration object.

### **Specify the display format of search results, either list view or card view**

Use the new ResultDisplayFormat field in the SearchCriteriaConfiguration object.

### **Specify the name of the OmniStudio FlexCard used to display search results as cards**

Use the new ResultFlexCard field in the SearchCriteriaConfiguration object.

## CSV Data Management for Industries

Get ready-to-use data in your apps faster using the new CSV Data Management tool. With just a few clicks you can easily import large amounts of data in to Salesforce objects, reducing manual data entry and the risk of errors. Prepare and upload your CSV file, map columns to Salesforce objects, validate your data to ensure frictionless import, and download import log files.

### [Prepare and Upload CSV File](#)

Rapidly input large amounts of data by preparing it in a CSV file and importing it into Salesforce. You can import data into Salesforce standard objects and custom objects.

### [Select Salesforce Object and Map Columns](#)

Select the Salesforce object where you want to import the data. You can insert, update, or upsert data into the Salesforce object. The columns in the CSV file are automapped based on the nearest match with the Salesforce object fields. You can modify the mapping of the columns and save the mapping for future use.

### [Preview and Validate CSV File Data](#)

Get a preview of the import settings.

### [View Import Logs](#)

When the CSV data import begins, check the status of the import process and download the success and error logs.

## Prepare and Upload CSV File

Rapidly input large amounts of data by preparing it in a CSV file and importing it into Salesforce. You can import data into Salesforce standard objects and custom objects.

**Where:** This change applies to Lightning Experience where CSV Data Import is enabled.

**Who:** Users with the Basic CSV Data Import permission set can import a CSV file.

SEE ALSO:

[Salesforce Help: Prepare CSV Files \(can be outdated or unavailable during release preview\)](#)

## Select Salesforce Object and Map Columns

Select the Salesforce object where you want to import the data. You can insert, update, or upsert data into the Salesforce object. The columns in the CSV file are automapped based on the nearest match with the Salesforce object fields. You can modify the mapping of the columns and save the mapping for future use.

**Where:** This change applies to Lightning Experience where CSV Data Import is enabled.

**Who:** Users with the Basic CSV Data Import permission set can import a CSV file.

SEE ALSO:

[Salesforce Help: Import CSV Files \(can be outdated or unavailable during release preview\)](#)

## Preview and Validate CSV File Data

Get a preview of the import settings.

**Where:** This change applies to Lightning Experience where CSV Data Import is enabled.

**Who:** Users with the Basic CSV Data Import permission set can import a CSV file.

SEE ALSO:

[Salesforce Help: Import CSV Files \(can be outdated or unavailable during release preview\)](#)

## View Import Logs

When the CSV data import begins, check the status of the import process and download the success and error logs.

**Where:** This change applies to Lightning Experience where CSV Data Import is enabled.

**Who:** Users with the Basic CSV Data Import permission set can import a CSV file.

SEE ALSO:

[Salesforce Help: Download Import Logs \(can be outdated or unavailable during release preview\)](#)

## Data Processing Engine

Enjoy more Data Cloud flexibility in your definitions with more objects types to choose from in data source and writeback nodes. Choose Data Cloud Data Spaces for your definition. Troubleshoot quickly by restoring previous field selections in your data source when you encounter an issue with a reference node. Upload CSV file data and write it back to an entity in Salesforce.

### [Choose Data Cloud Objects for Data Sources](#)

Choose from three new Data Cloud object types in your data source node configuration: Data Model Object (DMO), Data Lake Object (DLO), and Calculated Insights Object (CIO). The Data Cloud objects are available in data source nodes in definitions using the Data Cloud runtime.

### [Write Back Results to Data Lake Objects](#)

Choose a Data Cloud Data Lake Object to write back your definition transformation results to. Select the Data Lake Object target type when you configure a writeback node.

### [Use Data Spaces in Data Processing Engine Definitions](#)

When creating your definition and choosing the Data Cloud runtime, you can now select a Data Space for the definition. Choosing the data space allows you to use objects from that data space in the definition. Data Spaces are configured in Data Cloud.

### [Troubleshoot Quickly with Restore Previous Saved Field Selection](#)

If you make changes to a source node's field selection that cause an issue with a reference node downstream, quickly resolve the issue by using Restore Previous Saved Field Selection. The source node's previous saved field selection is brought back, allowing you to immediately fix the problem. This feature is enabled in any source node configuration when you clear a saved source node field selection that another node in your definition references.

### [Upload CSV File Data to Salesforce with Data Processing Engine](#)

Use Data Processing Engine definitions to read data from a CSV file and write it back to an entity in Salesforce. CSV files are an effective and efficient way to handle large volumes of data without suffering significant performance issues.

### [Data Processing Engine Videos](#)

New videos help you learn about the capabilities of Data Processing Engine.

### [Metadata API](#)

Access more metadata through these new and changed metadata types.

## Choose Data Cloud Objects for Data Sources

Choose from three new Data Cloud object types in your data source node configuration: Data Model Object (DMO), Data Lake Object (DLO), and Calculated Insights Object (CIO). The Data Cloud objects are available in data source nodes in definitions using the Data Cloud runtime.

**Where:** This change applies to Lightning Experience in Enterprise, Professional, and Unlimited editions where Data Processing Engine is enabled.

SEE ALSO:

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

## Write Back Results to Data Lake Objects

Choose a Data Cloud Data Lake Object to write back your definition transformation results to. Select the Data Lake Object target type when you configure a writeback node.

**Where:** This change applies to Lightning Experience in Enterprise, Professional, and Unlimited editions where Data Processing Engine is enabled.

SEE ALSO:

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

## Use Data Spaces in Data Processing Engine Definitions

When creating your definition and choosing the Data Cloud runtime, you can now select a Data Space for the definition. Choosing the data space allows you to use objects from that data space in the definition. Data Spaces are configured in Data Cloud.

**Where:** This change applies to Lightning Experience in Enterprise, Professional, and Unlimited editions where Data Processing Engine is enabled.

**How:** In the **New Data Processing Engine Definition** page, select the data space.

SEE ALSO:

[Salesforce Help: Manage Data Spaces \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Create a Data Processing Engine Definition \(can be outdated or unavailable during release preview\)](#)

## Troubleshoot Quickly with Restore Previous Saved Field Selection

If you make changes to a source node's field selection that cause an issue with a reference node downstream, quickly resolve the issue by using Restore Previous Saved Field Selection. The source node's previous saved field selection is brought back, allowing you to immediately fix the problem. This feature is enabled in any source node configuration when you clear a saved source node field selection that another node in your definition references.

**Where:** This change applies to Lightning Experience in Enterprise, Professional, and Unlimited editions where Data Processing Engine is enabled.

## Upload CSV File Data to Salesforce with Data Processing Engine

Use Data Processing Engine definitions to read data from a CSV file and write it back to an entity in Salesforce. CSV files are an effective and efficient way to handle large volumes of data without suffering significant performance issues.

**Where:** This change applies to Lightning Experience in Enterprise, Professional, and Unlimited editions where Data Processing Engine is enabled.

**How:** CSV upload functionality is available through Data Processing Engine Tooling API.

## Data Processing Engine Videos

New videos help you learn about the capabilities of Data Processing Engine.

- [Introduction to Data Processing Engine](#) shows an overview of Data Processing Engine fundamentals and functionality, and how you can transform your data so that it's meaningful to you.

## Metadata API

Access more metadata through these new and changed metadata types.

## Data Processing Engine

### Store the data space API name from Data Cloud for structured data storage

Use the new `dataSpaceApiName` field on the existing `BatchCalcJobDefinition` metadata type. Introduced in API version 60.0, this field has been added to the *Rebate Management Developer Guide*.

### Assign the primary key to the column name for the Data Cloud CSV file

Use the new `isPrimaryKey` field on the existing `BatchCalcJobDataSourceField` metadata subtype of `BatchCalcJobDefinition` metadata type. Introduced in API version 60.0, this field has been added to the *Rebate Management Developer Guide*.

SEE ALSO:

[Rebate Management Developer Guide: BatchCalcJobDefinition \(can be outdated or unavailable during release preview\)](#)

## Discovery Framework

Designate specific questions to prefill with data from previous assessment responses. If internal users aren't ready to submit an assessment, they can save it as a draft to complete at their convenience.

### [Choose Which Assessment Questions to Prefill](#)

Using data from previously submitted responses saves your respondents the time and effort of entering responses to the same questions on different assessment forms. Now you can be more selective and designate specific questions to prefill with data from previously submitted responses.

### [Save Assessments as Drafts to Complete Later in Health Cloud](#)

Internal Health Cloud users can save drafts of assessments that they're not ready to submit. They can easily find the draft assessments that are in progress and complete them at their convenience later. The flexibility to save drafts prevents loss of work when internal users pause an assessment for any reason.

### [Changed Objects in Discovery Framework](#)

Designate questions to prefill by using this changed object in Discovery Framework.

## Choose Which Assessment Questions to Prefill

Using data from previously submitted responses saves your respondents the time and effort of entering responses to the same questions on different assessment forms. Now you can be more selective and designate specific questions to prefill with data from previously submitted responses.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions where Discovery Framework is enabled.

**Who:** This feature is available to users with the Industries Assessment permission set license and the Run Decision Table permission.

**How:** From Setup, in the Quick Find box, enter *Assessments*, and then select **Prefill Assessment Question Settings**. Then follow the guided setup instructions on the page to set up prefill questions, configure the prebuilt decision table, update OmniScripts, and assign required permissions.

SEE ALSO:

[Salesforce Help: Designate Questions to Prefill with Previously Submitted Responses \(can be outdated or unavailable during release preview\)](#)

## Save Assessments as Drafts to Complete Later in Health Cloud

Internal Health Cloud users can save drafts of assessments that they're not ready to submit. They can easily find the draft assessments that are in progress and complete them at their convenience later. The flexibility to save drafts prevents loss of work when internal users pause an assessment for any reason.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions where Discovery Framework and Health Cloud are enabled.

**Who:** This feature is available to users with the Industries Assessment permission set license.

**How:** To configure the **Save for later** option in a custom assessment, open the assessment OmniScript in the OmniScript Designer. In the Setup panel, select **Allow Save For Later**. Find the Seed Data JSON section and then click **+ Add New Key/Value Pair**. For Key, enter `UsageType`. For Value, enter `HCUsageType`.

As an internal user, to save an assessment for later, click **Save for later**. To finish an assessment, click the action menu on an assessment in progress and select **Continue**.

SEE ALSO:

[Salesforce Help: Create an Assessment with Discovery Framework \(can be outdated or unavailable during release preview\)](#)

## Changed Objects in Discovery Framework

Designate questions to prefill by using this changed object in Discovery Framework.

### Configure assessment questions to prefill

Use the new `IsPrefill` field in the `OmniProcessAsmtQuestionVer` object.

SEE ALSO:

[Industries Common Resources Developer Guide: OmniProcessAsmtQuestionVer \(can be outdated or unavailable during release preview\)](#)

## Engagement

To get an object's record details in a flow, use the Get Record Details action.

### [Automate Business Processes with the Get Record Details Action](#)

Use the Get Record Details action in a flow to get the record details of an object and its related objects. The details can include the name of the parent record also. For example, to use Einstein generative AI to generate a summary of a customer conversation, use the Get Record Details action in a Prompt Template flow. The action gets record details from the specified object and the related objects.

SEE ALSO:

[Salesforce Help: Flow Action: Get Record Details \(can be outdated or unavailable during release preview\)](#)

## Automate Business Processes with the Get Record Details Action

Use the Get Record Details action in a flow to get the record details of an object and its related objects. The details can include the name of the parent record also. For example, to use Einstein generative AI to generate a summary of a customer conversation, use the Get Record Details action in a Prompt Template flow. The action gets record details from the specified object and the related objects.

**Where:** This change applies to Lightning Experience in clouds where the Get Record Details action is available.



**Who:** To use this feature, users need the Industry Service Excellence add-on license.

## Grantmaking

Grant seekers can now add collaborators to help with grant applications in an Experience Cloud site. Grant makers and recipients can now see the difference between planned and actual budget spent. Grant makers can add invitation-only application funding opportunities to Experience Cloud.

### [Add Collaborators to a Grantmaking Portal](#)

Grant seekers can securely add collaborators to help complete grant applications in your Experience Cloud site. For example, the development director who's completing organizational summary information in an application can add the program director to complete details about their programs and the planned budget for the grant.

### [See the Difference Between the Planned Budget and What Was Spent](#)

The new variance column of the budget management table shows how much of the actual spending was over or under the planned amount. In an Experience Cloud site, grantees can see how their spending matches their submitted budget. Grant managers can view planned, actual, and variance amounts.

### [Create Private Funding Opportunities in Experience Cloud](#)

Post an invitation-only funding opportunity on your Experience Cloud site, and use Compliant Data Sharing to add a representative from an organization who can complete the application.

### [New and Changed Objects for Grantmaking](#)

Use Compliant Data Sharing with Funding Opportunities.

## Add Collaborators to a Grantmaking Portal

Grant seekers can securely add collaborators to help complete grant applications in your Experience Cloud site. For example, the development director who's completing organizational summary information in an application can add the program director to complete details about their programs and the planned budget for the grant.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Grantmaking is enabled.

**Who:** To set up Compliant Data Sharing (CDS) for Grantmaking objects, users need the Grantmaking Manager permission set and the Configure Compliant Data Sharing system permission. To share records using CDS, users need the Use Compliant Data Sharing system permission and either be the owner of the record or have edit access on the record through CDS. To have a record shared with them using CDS, users need the Use Compliant Data Sharing system permission.

SEE ALSO:

[Salesforce Help: Securely Share Grantmaking Records in CRM or Experience Cloud Using Compliant Data Sharing \(can be outdated or unavailable during release preview\)](#)

## See the Difference Between the Planned Budget and What Was Spent

The new variance column of the budget management table shows how much of the actual spending was over or under the planned amount. In an Experience Cloud site, grantees can see how their spending matches their submitted budget. Grant managers can view planned, actual, and variance amounts.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Grantmaking is enabled.

SEE ALSO:

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

## Create Private Funding Opportunities in Experience Cloud

Post an invitation-only funding opportunity on your Experience Cloud site, and use Compliant Data Sharing to add a representative from an organization who can complete the application.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Grantmaking is enabled.

**Who:** To set up Compliant Data Sharing (CDS) for Grantmaking objects, users need the Grantmaking Manager permission set and the Configure Compliant Data Sharing system permission. To share records using CDS, users need the Use Compliant Data Sharing system permission and either be the owner of the record or have edit access on the record through CDS. To have a record shared with them using CDS, users need the Use Compliant Data Sharing system permission.

SEE ALSO:

[Salesforce Help: Securely Share Grantmaking Records in CRM or Experience Cloud Using Compliant Data Sharing \(can be outdated or unavailable during release preview\)](#)

## New and Changed Objects for Grantmaking

Use Compliant Data Sharing with Funding Opportunities.

### Use Compliant Data Sharing with Grantmaking records

Turn on Compliant Data Sharing for the new Grantmaking `FundingOppParticipant` object.

SEE ALSO:

[Salesforce Developer Documentation: Grantmaking Developer Guide](#)

## Intelligent Document Reader

Get Intelligent Document Reader to easily extract unstructured content and specific table information from uploaded documents.

### [Streamline Data Extraction by Using Intelligent Document Reader](#)

Automatically extract information from uploaded documents by using Amazon Textract through your AWS account. Configure questions for a document type to extract the required unstructured content and extract specific table information. Use the extracted information to create or update record fields, or to verify the data that's already in Salesforce.

### [Changed Invocable Actions](#)

Invocable actions represent the actions that can be accomplished on Salesforce with APIs.

## Streamline Data Extraction by Using Intelligent Document Reader

Automatically extract information from uploaded documents by using Amazon Textract through your AWS account. Configure questions for a document type to extract the required unstructured content and extract specific table information. Use the extracted information to create or update record fields, or to verify the data that's already in Salesforce.

**Where:** This change applies to the Lightning Experience of multiple Industries clouds.

**Who:** Apart from Financial Services Cloud, Health Cloud, and Public Sector Solutions, Intelligent Document Reader is also available with the Intelligent Document Reader add-on license for the Automotive, Consumer Goods, Education, Manufacturing, Media, and Net Zero clouds.

## Changed Invocable Actions

Invocable actions represent the actions that can be accomplished on Salesforce with APIs.

Invocable actions are available through the REST API. This invocable action is updated.

### Initiate Text Extraction Action

The request body has this new property.

- `documentTypeId`— The ID of the document type that contains the queries.

For more information on invocable actions, see the [Actions Developer's Guide](#).

SEE ALSO:

[Industries Common Resources Developer Guide: Initiate Text Extraction Action](#)

## Intelligent Form Reader

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- `documentTypeId`— The ID of the document type that contains the queries.

For more information on invocable actions, see the [Actions Developer's Guide](#).

SEE ALSO:

[Industries Common Resources Developer Guide: Initiate Text Extraction Action](#)

## KPI Bar

Administrators can create custom key performance indicators (KPIs) for actionable lists. List Creators can customize KPI Bar by adding custom KPIs. List creators can now show or hide KPI Bar.

### [Provide Customized Insights on Actionable Lists](#)

Administrators can create custom key performance indicators (KPIs). The custom KPIs help list creators gain a measurable overview of an actionable list's performance toward achieving specific business goals.

### [Optimize Business Performance by Using Custom Key Performance Indicators](#)

List creators can use up to three custom key performance indicators (KPIs) on KPI Bar to gain tailored insights on their actionable lists.

### [Experience Streamlined Navigation in KPI Bar](#)

Toggle the visibility of KPI Bar to reduce clutter, improve readability, and focus on the information that's relevant to the current task.

### [New Objects in KPI Bar](#)

Use the new objects in KPI Bar to create custom key performance indicators and map the indicators to actionable lists.

SEE ALSO:

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

## Provide Customized Insights on Actionable Lists

Administrators can create custom key performance indicators (KPIs). The custom KPIs help list creators gain a measurable overview of an actionable list's performance toward achieving specific business goals.

**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 and must enable the Actionable Segmentation pref.

**How:** From Setup, in the Quick Find box, enter *Custom Key Performance Indicators*, and then click **Custom Key Performance Indicators**. Next, click **New**, enter a name and description, select the target object, select a function and field, specify the filters, and save your changes.

## Optimize Business Performance by Using Custom Key Performance Indicators

List creators can use up to three custom key performance indicators (KPIs) on KPI Bar to gain tailored insights on their actionable lists.

**Where:** This change applies to Lightning Experience in clouds where Actionable List Members is available.

**Who:** To use this feature, users must have the Industry Sales Excellence add-on license, edit access to the actionable list that they want to use custom KPIs for, and access to the Actionable List Key Performance Indicator Definition and Actionable List Key Performance Indicator Assignment objects.

**How:** On KPI Bar, click . Select up to six KPIs, with up to three custom KPIs, to be shown on KPI Bar, and save your changes.

## Experience Streamlined Navigation in KPI Bar

Toggle the visibility of KPI Bar to reduce clutter, improve readability, and focus on the information that's relevant to the current task.

**Where:** This change applies to Lightning Experience in clouds where Actionable List Members is available.

**Who:** To use this feature, list creators need the Industry Sales Excellence add-on license and the Actionable Segmentation permission set.

**How:** To toggle the visibility of KPI Bar, click **Show KPI Bar** or **Hide KPI Bar** on KPI Bar.

## New Objects in KPI Bar

Use the new objects in KPI Bar to create custom key performance indicators and map the indicators to actionable lists.

### Define custom key performance indicators for a specific field in a Salesforce object

Use the new ActnblListKeyPrfmIndDef object.

### See key performance indicators on KPI Bar

Use the new ActnblListKeyPrfmIndAsgnt object.

## List Builder for Data Cloud Segment

List creators must select a data space before selecting a data segment. The actionable list preview shows the default columns of the associated object. An email notification is sent to the list creator when an actionable list reaches 50,000 member records.

### [Access Data Segments Securely and Easily](#)

Bolster security and compliance measures by restricting access to data through data spaces. While creating an actionable list from a Data Cloud segment, authorized list creators can now easily navigate and select the appropriate segment by specifying a data space. The page shows segments corresponding to the selected data space.

### [View Key Information Quickly](#)

List creators can see important information at a glance in the actionable list preview. The preview now shows the default columns of the object associated with the selected Data Cloud segment.

### [Stay Informed on Actionable List Limit with Email Notification](#)

An actionable list can contain up to 50,000 member records. When this limit is reached, the list creator receives a timely update through an email notification, allowing them to make the required changes.

SEE ALSO:

[Salesforce Help: List Builder for Data Cloud Segment \(can be outdated or unavailable during release preview\)](#)

## Access Data Segments Securely and Easily

Bolster security and compliance measures by restricting access to data through data spaces. While creating an actionable list from a Data Cloud segment, authorized list creators can now easily navigate and select the appropriate segment by specifying a data space. The page shows segments corresponding to the selected data space.

**Where:** This change applies to Lightning Experience in clouds where List Builder for Data Cloud Segment is available.

**Who:** To use this feature, users need the Data Spaces, Industry Sales Excellence, and Segmentation and Activation add-on licenses.

**How:** On the Actionable Lists list view, click **Create new list**. Select **Data Cloud Segment** as the source. Then, enter the name and description of the list, select a data space, select a segment, specify the publishing schedule, select columns, and then configure the actionable list member statuses.

## View Key Information Quickly

List creators can see important information at a glance in the actionable list preview. The preview now shows the default columns of the object associated with the selected Data Cloud segment.

**Where:** This change applies to Lightning Experience in clouds where List Builder for Data Cloud Segment is available.

**Who:** To use this feature, users need the Industry Sales Excellence and Segmentation and Activation add-on licenses.

**How:** On the Actionable Lists list view, click **Create new list**. Select **Data Cloud Segment** as the source. Then, enter the name and description of the list, select a data space, select a segment, and specify the publishing schedule.

## Stay Informed on Actionable List Limit with Email Notification

An actionable list can contain up to 50,000 member records. When this limit is reached, the list creator receives a timely update through an email notification, allowing them to make the required changes.

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**Who:** To use this feature, users need the Industry Sales Excellence and Segmentation and Activation add-on licenses.

## Outcome Management

Take the manual work out of adding indicator results and ensure that results are measured consistently with a flow. Collaborate with partner organizations and grantees in Experience Cloud. Connect Outcome Management to care plans in Case Management.

### [Automatically Calculate and Create Indicator Results](#)

Save your team time, get real-time results, and ensure better data quality with the Calculate Goal Completion Percent for Indicator Result flow template. Adapt the flow template for your business needs to automatically calculate other indicator results. See the most recent results that are associated with indicator performance periods with fewer clicks. Add the Calculate Indicator Result button and the Indicator Results timeline to the Indicator Performance Period Lightning page layout.

### [Connect Case Management Care Plans to Outcome Management](#)

You can now indicate which care plan goals you expect to drive outcomes, and create increased visibility into your overall strategy for creating impact and alignment across your organization.

### [Use Outcome Management with Experience Cloud](#)

Share your outcome strategy on Experience Cloud. Collaborate with grantees and partner organizations on things like setting targets and collecting results.

### [New and Changed Objects for Outcome Management](#)

Do more with the new Outcome Management fields.

## Automatically Calculate and Create Indicator Results

Save your team time, get real-time results, and ensure better data quality with the Calculate Goal Completion Percent for Indicator Result flow template. Adapt the flow template for your business needs to automatically calculate other indicator results. See the most recent results that are associated with indicator performance periods with fewer clicks. Add the Calculate Indicator Result button and the Indicator Results timeline to the Indicator Performance Period Lightning page layout.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Outcome Management is enabled.

SEE ALSO:

[Salesforce Help: Using a Flow to Calculate Indicator Results \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Track Progress with Indicator Results \(can be outdated or unavailable during release preview\)](#)

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

## Connect Case Management Care Plans to Outcome Management

You can now indicate which care plan goals you expect to drive outcomes, and create increased visibility into your overall strategy for creating impact and alignment across your organization.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Outcome Management is enabled.

SEE ALSO:

[Salesforce Developer Documentation: Outcome Management Data Model](#)

## Use Outcome Management with Experience Cloud

Share your outcome strategy on Experience Cloud. Collaborate with grantees and partner organizations on things like setting targets and collecting results.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Outcome Management is enabled.

**Who:** Users with the Outcome Management permission set can manage Outcome Management objects on an Experience Cloud site. Users with the Outcome Management for Experience Cloud permission set can access Outcome Management objects on an Experience Cloud site.

SEE ALSO:

[Salesforce Help: Outcome Management Experience Cloud Site \(can be outdated or unavailable during release preview\)](#)

## New and Changed Objects for Outcome Management

Do more with the new Outcome Management fields.

### Connect Case Management care plans to Outcome Management

Use the new `GoalDefinition` value in the existing `Type` field and the new `GoalDefinition` field on the existing Outcome Activities object.

### Automatically calculate and create indicator results

Define which flow to use to calculate results with the new `FlowDefinitionApiName` field on the existing Indicator Definition object. See which flow calculated the result in the new `CalculationMethod`, `FlowDefinitionApiName`, `FlowVersion`, `Numerator`, and `Denominator` fields on the existing Indicator Result object.

SEE ALSO:

[Salesforce Developer Documentation: Outcome Management Developer Guide](#)

## Scheduled Reminders

Send automated emails to remind users about important occurrences and occasions.

### [Drive Engagement with Scheduled Reminders](#)

Keep users engaged and ensure that they never miss critical responsibilities or occasions. Send scheduled reminders about occurrences or actions via emails when specific criteria are met. For example, survey creators can send reminders to recipients who are yet to respond to surveys. These gentle nudges help drive survey engagement and response rates, which contribute to the success of the survey initiative.

### [New Objects in Scheduled Reminders](#)

Do more with the new objects for Scheduled Reminders.

### [New Connect REST API Resource in Scheduled Reminders](#)

Learn more about the available resource in Scheduled Reminders.

## Drive Engagement with Scheduled Reminders

Keep users engaged and ensure that they never miss critical responsibilities or occasions. Send scheduled reminders about occurrences or actions via emails when specific criteria are met. For example, survey creators can send reminders to recipients who are yet to respond to surveys. These gentle nudges help drive survey engagement and response rates, which contribute to the success of the survey initiative.

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

**Who:** To create scheduled reminders, users need the Manage Scheduled Reminders user permission.

**How:** From the App Launcher, find and select **Reminder Definitions**. Click **New**, and then follow the setup flow to create a reminder.



SEE ALSO:

[Salesforce Help: Enable Scheduled Reminders](#) (can be outdated or unavailable during release preview)

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

## New Objects in Scheduled Reminders

Do more with the new objects for Scheduled Reminders.

### Create a reminder

Use the new ReminderDefinition object.

### Select the channel to send reminders

Use the new ReminderDefinitionChannel object.

### Schedule a reminder

Use the new ScheduledReminder object.

### Review the details of a reminder

Use the new ReminderRecord object.

## New Connect REST API Resource in Scheduled Reminders

Learn more about the available resource in Scheduled Reminders.

### Create a reminder definition and reminder definition channel

Make a POST request to the new `/connect/reminder/reminder-definition` resource.

New request body: Reminder Create Input

New response body: Reminder Details

### Update a reminder definition and reminder definition channel

Make a PATCH request to the new `/connect/reminder/reminder-definition` resource.

New request body: Reminder Update Input

New response body: Reminder Details

SEE ALSO:

[Industries Common Resources Developer Guide: REST Reference](#)

## Timeline

Configure Timeline to show engagement events from a specific data space in Data Cloud.

### [Securely Show Engagement Events on Timeline](#)

Enhance security and compliance by restricting the engagement events that contact center agents can see on Timeline. Administrators can select a data space while configuring Timeline, which shows only the engagement events that are related to the selected data space.

### [New Object in Timeline](#)

Localize timeline names with this new object.

SEE ALSO:

[Salesforce Help: View Events Using Timeline in Salesforce \(can be outdated or unavailable during release preview\)](#)

## Securely Show Engagement Events on Timeline

Enhance security and compliance by restricting the engagement events that contact center agents can see on Timeline. Administrators can select a data space while configuring Timeline, which shows only the engagement events that are related to the selected data space.

**Where:** This change applies to Lightning Experience in clouds where Timeline and Data Cloud are available.

**Who:** To use this feature, users need the Industry Service Excellence and Data Spaces add-on license. Contact center agents must have access to the selected data space.

**How:** From Setup, on the Timeline page, click **New Timeline**, and then select **Data Cloud Events**. Enter the details of the data space, related object, and engagement data model object. Then, enter the conditions for showing records on the timeline, define the fields to show, and then activate the timeline.

## New Object in Timeline

Localize timeline names with this new object.

### **Represent the translated value of a timeline configuration's name**

Use the new TimelineObjectDefinitionLocalization object. Translation Workbench must be enabled for your org.

SEE ALSO:

[Developer Guide: TimelineObjectDefinitionLocalization](#)

# Marketing Cloud Growth

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Marketing Cloud Growth edition uses the power of the Salesforce platform and reimagined core objects to offer a curated experience just for marketers. This experience is generally available in Spring '24. Kick-start campaigns with predefined options, build meaningful audiences from unified data, and create automated messaging using new flow elements. Plus, get a little help from Einstein generative AI along the way. Admins can use the setup assistant in Salesforce Setup and the implementation guide to help prepare and customize your Marketing Cloud Growth.

## [Kick-Start Campaign Creation with Preset Options](#)

The reimagined campaign object in Marketing Cloud Growth offers options that help you get started faster. Create a campaign that's preconfigured with draft content, or co-create one with Einstein. Choose from a single email, email series, or sign-up form, and use the new checklist-style layout to make sure you've got everything taken care of. Each campaign is coupled with a flow to automate content distribution. Flow Builder offers flexible configuration settings to help you curate and automate the customer experience.

## [Build Audiences and Track Success with Unified Data](#)

Marketing Cloud Growth is built on Data Cloud so that you can organize data from multiple sources, and then use unified profiles to target your audience. You can build Data Cloud segments by hand or co-create them with Einstein generative AI.

## [Market Responsibly with Consent Management Tools](#)

Stay compliant with privacy regulations when using the prebuilt tools and assets in Marketing Cloud Growth. Track consent for marketing channels and communication subscriptions, such as your weekly newsletter. Built-in preference pages make it easy for subscribers to update their opt-in status for email and SMS. Plus, import consent data in bulk on the Consent tab.

## [Generate Campaigns and Segments with Einstein AI](#)

When you aren't sure how to get started or want a fresh perspective, get some help from Einstein generative AI in Marketing Cloud Growth. Enter a few details about the purpose and goals of your campaign, and let Einstein generate a campaign brief with KPIs, target audiences, and recommended content. Einstein AI can also help build relevant segments with available attributes and suggest email subject lines, preheaders, and body text.

## [Create Content in a Consistent Editing Experience](#)

Marketing Cloud Growth helps you build and host emails, landing pages, and forms, which are backed by Salesforce CMS. SMS messaging is available as an add-on. When you create content in these editors, you can expect the same drag-and-drop behavior, preview functionality, and publishing behavior for all content types. Plus, try out the brand center (beta) to create brands that ensure consistent styling across content types.

## [Other Features in Marketing Cloud Growth](#)

Learn about other features we're releasing for Marketing Cloud Growth in Spring '24.

### SEE ALSO:

[Implementation Guide: Marketing Cloud Setup \(can be outdated or unavailable during release preview\)](#)

## Kick-Start Campaign Creation with Preset Options

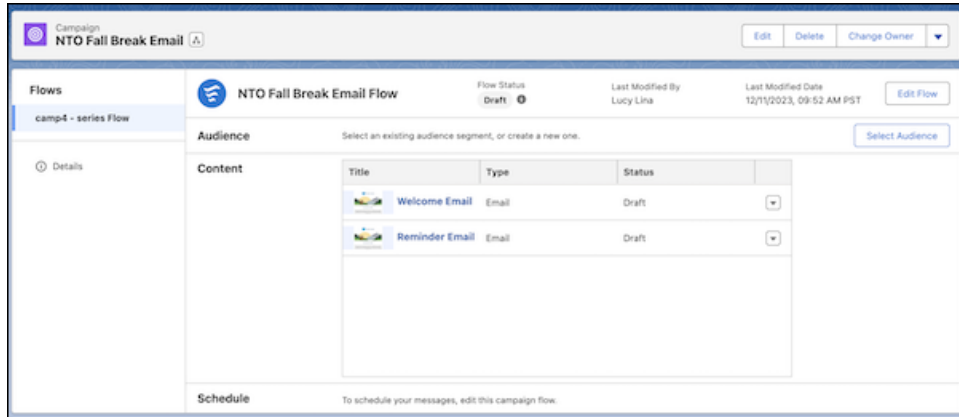
The reimagined campaign object in Marketing Cloud Growth offers options that help you get started faster. Create a campaign that's preconfigured with draft content, or co-create one with Einstein. Choose from a single email, email series, or sign-up form, and use the new checklist-style layout to make sure you've got everything taken care of. Each campaign is coupled with a flow to automate content distribution. Flow Builder offers flexible configuration settings to help you curate and automate the customer experience.

**Where:** This feature is available in Lightning Experience for Salesforce Enterprise and Unlimited editions with Marketing Cloud Growth edition.

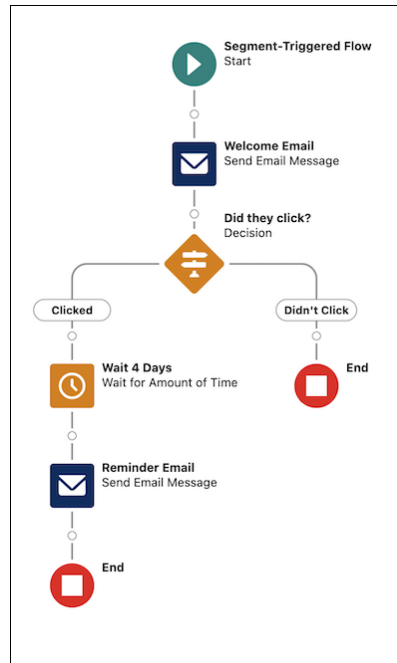
**When:** Marketing Cloud Growth features are available beginning on February 20, 2024.

**How:** Access to the campaigns, content, and the necessary flow elements is included in the Marketing Manager permission set. If you use custom permission sets, review the permissions list to make sure that users can access the correct data, authoring and publishing functionality, and individual flow element permissions.

Marketers can manage and create campaigns on the Campaigns tab. Select from the available options, configure related settings, and edit the content.



Campaigns can be as simple or as robust as you need them to be. Edit the flow for your campaign in Flow Builder to add messages, decisions, and wait times.



SEE ALSO:

[Salesforce Help: Manage Marketing Efforts with Campaigns \(can be outdated or unavailable during release preview\)](#)

## Build Audiences and Track Success with Unified Data

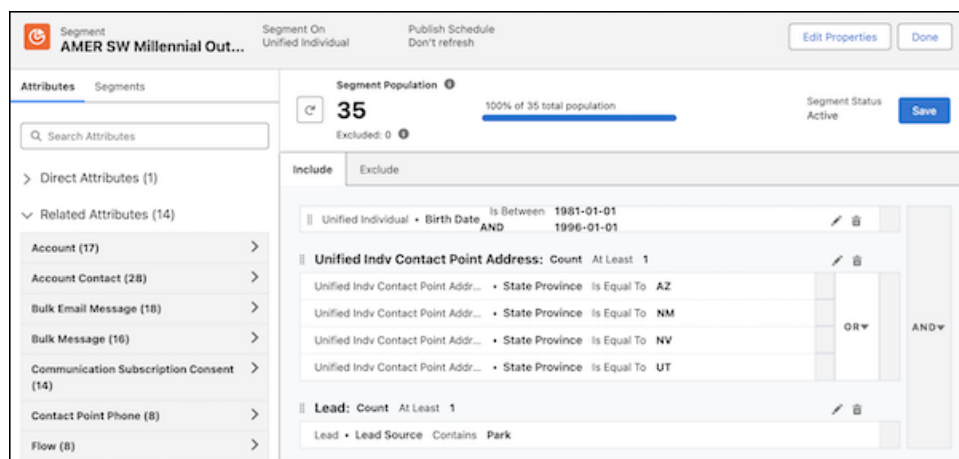
Marketing Cloud Growth is built on Data Cloud so that you can organize data from multiple sources, and then use unified profiles to target your audience. You can build Data Cloud segments by hand or co-create them with Einstein generative AI.

**Where:** This feature is available in Lightning Experience for Salesforce Enterprise and Unlimited editions with Marketing Cloud Growth edition.

**When:** Marketing Cloud Growth features are available beginning on February 20, 2024.

**How:** A user with Data Cloud admin permissions must install the required data kits and configure the data streams. Find links for package installation on the Marketing Cloud Growth Getting Started page in Salesforce Setup, and open Data Cloud data streams from the App Launcher.

After setup is complete, marketers can access Data Cloud segments from a campaign or on the Segments tab of the Marketing Cloud Growth app. For more information about importing and configuring external data, review [Connect and Ingest Data in Data Cloud](#).



SEE ALSO:

[Salesforce Help: Preparing Your Marketing Cloud Org \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Understanding Segmentation in Marketing Cloud \(can be outdated or unavailable during release preview\)](#)

## Market Responsibly with Consent Management Tools

Stay compliant with privacy regulations when using the prebuilt tools and assets in Marketing Cloud Growth. Track consent for marketing channels and communication subscriptions, such as your weekly newsletter. Built-in preference pages make it easy for subscribers to update their opt-in status for email and SMS. Plus, import consent data in bulk on the Consent tab.

**Where:** This feature is available in Lightning Experience for Salesforce Enterprise and Unlimited editions with Marketing Cloud Growth edition.

**When:** Marketing Cloud Growth features are available beginning on February 20, 2024.

**How:** Consent management tools are available by default, but require some configuration to support your specific business needs. You can customize your preference pages and create communication subscriptions on the Consent tab.

To let customers set their own communication preferences, use the default preference pages. Marketing admins can further customize the preference page in Preference Manager.

From the Consent tab, a marketing admin or marketing manager can add or remove channels from the default subscription, create subscriptions, and update the preference page for each marketing channel.

SEE ALSO:

[Salesforce Help: Ensure Compliance with Consent Settings \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Understanding Consent Concepts in Marketing Cloud \(can be outdated or unavailable during release preview\)](#)

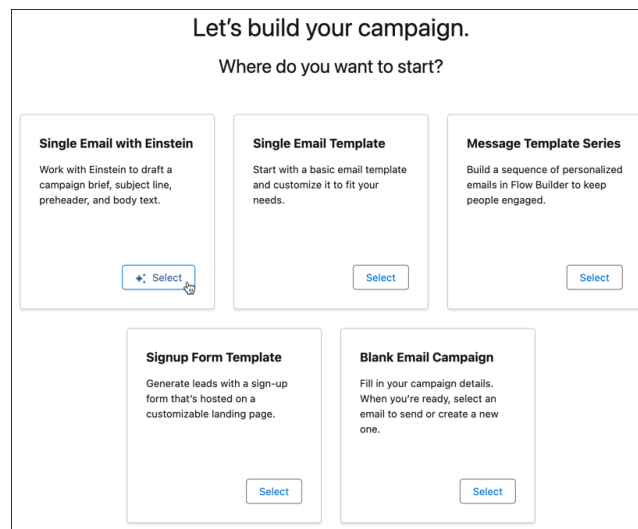
## Generate Campaigns and Segments with Einstein AI

When you aren't sure how to get started or want a fresh perspective, get some help from Einstein generative AI in Marketing Cloud Growth. Enter a few details about the purpose and goals of your campaign, and let Einstein generate a campaign brief with KPIs, target audiences, and recommended content. Einstein AI can also help build relevant segments with available attributes and suggest email subject lines, preheaders, and body text.

**Where:** This feature is available in Lightning Experience for Salesforce Enterprise and Unlimited editions with Marketing Cloud Growth edition.

**When:** Marketing Cloud Growth features are available beginning on February 20, 2024.

**How:** First, enable Einstein generative AI. Then, turn on co-create tools for campaigns and segments.



To create a single email campaign with a campaign brief and a draft segment and assets, select the Einstein option when creating the campaign. Einstein buttons in the email editor provide suggested subject lines, preheaders, and body text. For suggested audience attributes outside of a campaign, select the Einstein option when you create a segment on the Segments tab.

SEE ALSO:

[Salesforce Help: Activate Einstein Features in Marketing Cloud \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Increase Productivity with AI \(can be outdated or unavailable during release preview\)](#)

## Create Content in a Consistent Editing Experience

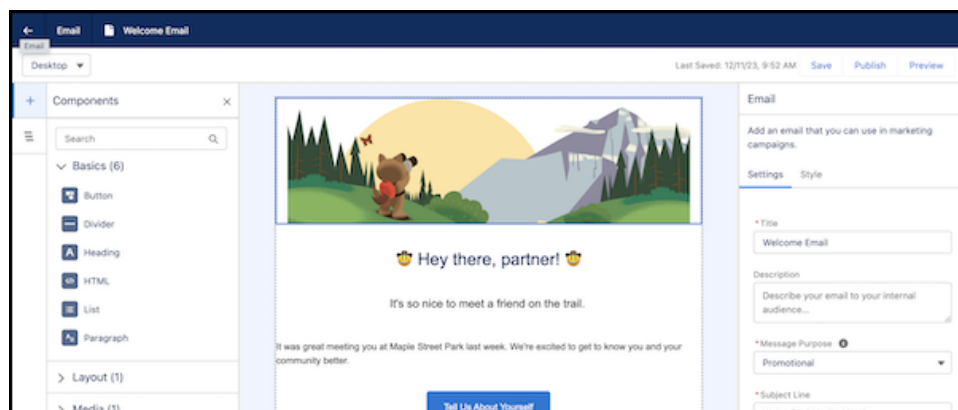
Marketing Cloud Growth helps you build and host emails, landing pages, and forms, which are backed by Salesforce CMS. SMS messaging is available as an add-on. When you create content in these editors, you can expect the same drag-and-drop behavior, preview functionality, and publishing behavior for all content types. Plus, try out the brand center (beta) to create brands that ensure consistent styling across content types.

**Where:** This feature is available in Lightning Experience for Salesforce Enterprise and Unlimited editions with Marketing Cloud Growth edition. SMS messages are available with the Salesforce Message Credits - SMS add-on.

**When:** Marketing Cloud Growth features are available beginning on February 20, 2024.

**How:** To let users create or manage content, assign the Marketing Manager permission set and contributor roles in your Salesforce CMS site and workspace. Marketers can then:

- Edit draft content from a campaign
- Create content from the Content tab
- Create content when you add certain elements to a flow



You can also add your brand to emails and landing pages. A marketing admin or marketing manager can create a brand on the Content tab. During the brand center beta, some brand features aren't available.

SEE ALSO:

[Salesforce Help: Manage Content in Marketing Cloud \(can be outdated or unavailable during release preview\)](#)

## Other Features in Marketing Cloud Growth

Learn about other features we're releasing for Marketing Cloud Growth in Spring '24.

**Where:** These features are available in Lightning Experience for Salesforce Enterprise and Unlimited editions with Marketing Cloud Growth edition.

- Einstein Send Time Optimization evaluates historical engagement data and predicts an ideal send time for emails sent to individual recipients. Enable it in the Einstein for Marketing section in Salesforce Setup.
- Einstein Metrics Guard is an AI-powered filter that protects your campaign metrics from bot clicks and opens while preserving legitimate interaction data. To enable it, head to **Salesforce Setup > Unified Messaging > Email > Email Feature Settings**.

- Engagement metrics backed by Data Cloud reporting include a collection of dashboards that share insights on emails and SMS messages. These reports are available by default.

SEE ALSO:

[Salesforce Help: Increase Productivity with AI \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Measure Success in Marketing Cloud \(can be outdated or unavailable during release preview\)](#)

## Marketing Cloud Engagement

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Marketing Cloud Engagement 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.

To learn about what's new and changed for Referral Marketing in Spring '24, review [Referral Marketing](#) on page 446.

For more on other features and enhancements in [Marketing Cloud Engagement Release Notes](#).

SEE ALSO:

[Marketing Cloud Engagement Overview](#)

[Marketing Cloud Engagement: Earlier Release Notes](#)

[Salesforce Marketing Cloud Engagement Facebook Page](#)

## Marketing Cloud Account Engagement

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Streamline processes and improve personalization with generative AI, enhanced Data Cloud integration, and a new email editing experience. Update your sending domains to prepare for upcoming changes to the Gmail and Yahoo email platforms in 2024.

### [Generate Content with Einstein in Account Engagement](#)

Safely use generative AI to streamline your content creation process. Quickly create forms, landing pages, email subject lines, and email body copy with Einstein Assistant for Account Engagement.

### [Import Account Engagement Email Data into Data Cloud](#)

Personalize your marketing efforts through Data Cloud using your email engagement data. To import data, enable the Account Engagement connector in Data Cloud and create an email engagement data stream.

### [Use the Latest Email Editing Experience for Account Engagement](#)

Prepare for updates to the Account Engagement email experience by trying out the new builder. View an email content record in Salesforce, and then click Edit in Builder. Choose the new email experience or continue using the existing email experience. You make this selection each time you click Edit in Builder.

### [Update Your Account Engagement Sending Domains to Prepare for 2024 Email Platform Changes](#)

Gmail and Yahoo announced changes to their spam prevention methods in 2024. Keep emails out of spam filters and stay aligned to email deliverability best practices by updating your sending domain with a verified DomainKeys Identified Mail (DKIM) record.

### [The Twitter Connector Has Been Retired](#)

Because X (formerly Twitter) has enacted changes to its API terms, the Twitter connector for Account Engagement is no longer available as of October 31, 2023.



[Account Engagement API: New and Changed Items](#)

Access more of your data with new and updated objects for Account Engagement API version 5.

## Generate Content with Einstein in Account Engagement

Safely use generative AI to streamline your content creation process. Quickly create forms, landing pages, email subject lines, and email body copy with Einstein Assistant for Account Engagement.

**Where:** This feature is available in Account Engagement Advanced and Premium editions and in Lightning Experience in Enterprise, Unlimited, and Performance editions.

SEE ALSO:

[Salesforce Help: Einstein Assistant in Account Engagement \(can be outdated or unavailable during release preview\)](#)

## Import Account Engagement Email Data into Data Cloud

Personalize your marketing efforts through Data Cloud using your email engagement data. To import data, enable the Account Engagement connector in Data Cloud and create an email engagement data stream.

**Where:** This change applies to all Account Engagement editions.

SEE ALSO:

[Salesforce Help: Marketing Cloud Account Engagement Connector \(can be outdated or unavailable during release preview\)](#)

## Use the Latest Email Editing Experience for Account Engagement

Prepare for updates to the Account Engagement email experience by trying out the new builder. View an email content record in Salesforce, and then click Edit in Builder. Choose the new email experience or continue using the existing email experience. You make this selection each time you click Edit in Builder.

**Where:** This change applies to all Account Engagement editions.

**When:** This feature will be available in the weeks following the Spring '24 release.

SEE ALSO:

[Create Content in a Consistent Editing Experience](#)

## Update Your Account Engagement Sending Domains to Prepare for 2024 Email Platform Changes

Gmail and Yahoo announced changes to their spam prevention methods in 2024. Keep emails out of spam filters and stay aligned to email deliverability best practices by updating your sending domain with a verified DomainKeys Identified Mail (DKIM) record.

**Where:** This change applies to all Account Engagement editions.

SEE ALSO:

[Knowledge Article: Bulk Sender Guidelines for Marketing Cloud Account Engagement to prepare for 2024 email platform changes](#)

## The Twitter Connector Has Been Retired

Because X (formerly Twitter) has enacted changes to its API terms, the Twitter connector for Account Engagement is no longer available as of October 31, 2023.

**Where:** This change applies to all Account Engagement editions.

## Account Engagement API: New and Changed Items

Access more of your data with new and updated objects for Account Engagement API version 5.

### Updated Objects in Version 5

#### Forms and Form Fields

Create and manage forms and form fields using the API.

#### Scheduling Fields

The Engagement Studio endpoint now returns the start and stop schedule fields.

### Other Changes

#### Updated Error Reporting with API Version 5 for Flow

Better error reporting to help diagnose issues when copying marketing assets.

## Mobile

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Accomplish tasks faster with Einstein Copilot. Mobile Offline for Salesforce Mobile App Plus gets updates to the Offline App Developer Starter Kit, Offline App Onboarding Wizard, and the new Mobile Builder (beta). Add a biometric ID check to your Mobile Publisher for Experience Cloud app. Easily expand or collapse all rules when you view the details of a briefcase in Briefcase Builder.

#### [Salesforce Mobile App](#)

Mobile Offline for Salesforce Mobile App Plus gets updates to the Offline App Developer Starter Kit, Offline App Onboarding Wizard, and the new Mobile Builder (beta).

#### [Mobile Publisher](#)

Update your Android app's Firebase information to support push notifications. Use the BiometricsService API to require a biometric ID check for certain features of your app.

#### [Briefcase Builder](#)

Review all rules and filters on a briefcase.

#### [General Mobile Updates](#)

Enter new Google Firebase information to support push notifications on Android mobile connected apps.

## Salesforce Mobile App

Mobile Offline for Salesforce Mobile App Plus gets updates to the Offline App Developer Starter Kit, Offline App Onboarding Wizard, and the new Mobile Builder (beta).

[Everything That's New in the Salesforce Mobile App](#)

Our latest round of new and improved Salesforce mobile app features makes it easier to access Salesforce on the go.

## Everything That's New in the Salesforce Mobile App

Our latest round of new and improved Salesforce mobile app features makes it easier to access Salesforce on the go.

The new Salesforce mobile app is available for all editions, except Database.com, without an additional license. Your org's Salesforce edition and licenses, as well as a user's assigned profile and permission sets, determine the Salesforce data and features that are available to each user.

Most features become available for the Salesforce mobile app the week of February 12, 2024.

Salesforce App Enhancements and Changes	Salesforce for Android	Salesforce for iOS	Set Up in the Full Site
<b>Einstein</b>			
<a href="#">Streamline Everyday Activities with Einstein Copilot on the Salesforce Mobile App</a>	✓	✓	✓
<a href="#">Generate Content on Record Pages with the Salesforce Mobile App</a>	✓	✓	✓
<b>Browser and Operating System</b>			
<a href="#">Salesforce Mobile App Requirements Have Changed</a>	✓	✓	
<b>Reports and Dashboards</b>			
<a href="#">Save Dashboard Views on Your Mobile Devices</a>	✓	✓	
<a href="#">Uncover Answers to Business Questions with Data Cloud Reports</a>	✓	✓	
<b>Offline Access</b>			
<a href="#">Easily Configure Offline Landing Pages with Mobile Builder (beta)</a>	✓	✓	✓
<a href="#">Offline App Developer Starter Kit Enhancements</a>	✓	✓	✓
<a href="#">Offline App Onboarding Wizard v2 Enhancements</a>	✓	✓	✓
<a href="#">Defined Global Actions Now Primed for Offline Use</a>	✓	✓	✓
<a href="#">Better Error Handling When Quick Actions Haven't Been Deployed</a>	✓	✓	✓
<b>Setup</b>			
<a href="#">Preview Mobile Actions on Record Pages Before Activating</a>	✓	✓	✓
<a href="#">Use Dynamic Actions on Standard Objects on Mobile</a>	✓	✓	✓

### [Streamline Everyday Activities with Einstein Copilot on the Salesforce Mobile App](#)

Ask Einstein to summarize records, draft emails, show related records, and execute all your custom Copilot actions in a conversational and intuitive experience on the Salesforce mobile app. Use Einstein on the Salesforce mobile app as soon as it's enabled for your org, with no additional setup needed. On iOS devices, activate Siri or Dictation to use voice commands in your Einstein Copilot experience.

### [Generate Content on Record Pages with the Salesforce Mobile App](#)

Users can generate content like field descriptions with the help of a field generation prompt template when working on their Salesforce mobile app.

## Streamline Everyday Activities with Einstein Copilot on the Salesforce Mobile App

Ask Einstein to summarize records, draft emails, show related records, and execute all your custom Copilot actions in a conversational and intuitive experience on the Salesforce mobile app. Use Einstein on the Salesforce mobile app as soon as it's enabled for your org, with no additional setup needed. On iOS devices, activate Siri or Dictation to use voice commands in your Einstein Copilot experience.

**Where:** This change applies to Lightning Experience and the Salesforce mobile app for iOS and Android in Enterprise, Performance, and Unlimited editions with the Einstein for Sales, Einstein for Service, or Einstein Platform add-on. Setup for Einstein Copilot is available on desktop.

SEE ALSO:

[Einstein Copilot](#)

## Generate Content on Record Pages with the Salesforce Mobile App

Users can generate content like field descriptions with the help of a field generation prompt template when working on their Salesforce mobile app.

**Where:** This change applies to Lightning Experience and the Salesforce mobile app for iOS and Android in Enterprise, Performance, and Unlimited editions with the Einstein for Sales, Einstein for Service, or Einstein Platform add-on. Setup for Einstein is available on desktop.

**How:** You added a Field Generation prompt template to help create content in fields on a record page. To use it on your Salesforce mobile app, enable Dynamic Forms on Mobile, activate the Lightning page, assign the prompt to the field, and save.

**When:** This feature is available on the Salesforce mobile app the week of March 10, 2024.

SEE ALSO:

[Simplify Daily Tasks with Prompt Builder \(Generally Available\)](#)

## Salesforce Mobile App Requirements Have Changed

Salesforce is revising the requirements for using the Salesforce mobile app for iOS and Android. Learn about the mobile platform requirements and the devices that we use for feature and performance testing as we continue to improve the Salesforce experience.

### Mobile Platform Requirements

To allow for innovation and to keep Salesforce current in the rapidly evolving mobile market, minimum platform requirements are subject to change at the sole discretion of Salesforce, with or without advance notice.

#### Operating System and Version Requirements

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Android 10.0 or later

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## Operating System and Version Requirements

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iOS 16.0 or later

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## Mobile Devices Used for Salesforce Testing

Salesforce performs automated and manual testing of the Salesforce mobile app for iOS and Android on a select set of mobile devices. This is the list of devices for Spring '24.

Platform	Phones	Tablets
<b>Android</b>	<ul style="list-style-type: none"> <li>• Pixel 6 / 6 Pro</li> <li>• Pixel 7 / 7 Pro</li> <li>• Samsung Galaxy S20 / S20+</li> <li>• Samsung Galaxy S10 / S10e / S10+</li> <li>• Samsung Galaxy Note 10+</li> <li>• Samsung Galaxy Note 9</li> <li>• Samsung Galaxy S9</li> <li>• Samsung Galaxy S21</li> <li>• Samsung Galaxy S22/22 Ultra</li> </ul>	<ul style="list-style-type: none"> <li>• Samsung Galaxy Tab S6</li> <li>• Samsung Galaxy Tab S7</li> <li>• Samsung Galaxy Tab A (8 inch)</li> </ul>
<b>iOS</b>	<ul style="list-style-type: none"> <li>• iPhone 15 / 15 Plus</li> <li>• iPhone 15 Pro / Pro Max</li> <li>• iPhone 14 Pro / Pro Max</li> <li>• iPhone 14 / 14 Plus</li> <li>• iPhone 13 Pro / Pro Max</li> <li>• iPhone 13</li> <li>• iPhone 12 Pro / Pro Max</li> <li>• iPhone 12</li> <li>• iPhone 11 Pro / Pro Max</li> <li>• iPhone 11</li> <li>• iPhone X</li> <li>• iPhone 8</li> <li>• iPhone XR</li> <li>• iPhone SE</li> </ul>	<ul style="list-style-type: none"> <li>• iPad Pro (10.5 inch - 12.9 inch)</li> <li>• iPad Pro (9.7 inch, 6th generation and later)</li> <li>• iPad Air 3rd Gen</li> <li>• iPad Mini 5th Gen</li> </ul>

Customers aren't blocked from using Salesforce on untested devices that meet current platform requirements. Salesforce might not be able to replicate some issues for customers using Salesforce on untested devices on due to manufacturer-specific customizations.

To allow for innovation and to keep Salesforce current in the rapidly evolving mobile market, the list of Salesforce-tested devices is subject to change at the sole discretion of Salesforce, with or without advance notice.

## Save Dashboard Views on Your Mobile Devices

The new Save View functionality enables you to save dashboard views on your mobile devices, such as a daily performance snapshot. Before this update, dashboard views could only be created on the desktop. In addition to creating views on your mobile device, you can easily switch between other saved views associated with the dashboard.

**Where:** This change applies to Lightning Experience and the Salesforce mobile app for iOS and Android in Professional, Developer, Enterprise, and Unlimited Editions.

**When:** Save View is available the week of February 12, 2024.

Open a CRM Analytics dashboard on your mobile device. Create a dashboard view, such as applying filters or selecting a chart metric. Tap **Save** then tap the Save View tab. Tap **Use as default view** for the view to automatically open with a dashboard. Type in a name for the view and tap **Save View**.

## Uncover Answers to Business Questions with Data Cloud Reports

Speed up your on-the-go business decisions with standard reports on single or multiple related data model objects (DMOs) or Calculated Insights. Or, build a custom report type on DMOs to get information on the most pertinent fields and records from Data Cloud. Group, filter, and summarize records in the report, run it for near real-time information and share it with others from the Salesforce mobile app. Garner insights faster by visualizing KPIs and trends in dashboard components on a Data Cloud source report.


**Where:** This change applies to Lightning Experience and the Salesforce mobile app for iOS and Android in Professional, Developer, Enterprise, and Unlimited Editions.

**How:** To access your Data Cloud Reports, open the Salesforce Mobile app. Tap **Menu**, and select the Analytics tab. Tap the report that you want to view from List Filter.

## Easily Configure Offline Landing Pages with Mobile Builder (beta)

The new Mobile Builder for Salesforce Mobile App (beta) enables you to customize the Salesforce mobile app's offline landing page for your mobile users without writing a single line of code. You can create custom configurations to show the most important records to mobile users and allow them to quickly and easily take relevant actions based on their unique mobile use cases.

**Where:** These changes apply to Salesforce Mobile App Plus for iOS and Android on phone and tablets in all editions, except Database.com.

 **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:** Mobile Builder (beta) is available in orgs with the Salesforce Mobile App Plus license and to users within that org who have the Mobile Offline for Salesforce Mobile App Plus user permission.

**How:** From Setup, in the Quick Find box, enter *Mobile Builder*, and then select **Mobile Builder for Salesforce Mobile App**. Create configurations and assign them to user profiles.

SEE ALSO:

[Salesforce Help: Customize with Mobile Builder \(can be outdated or unavailable during release preview\)](#)

## Offline App Onboarding Wizard v2 Enhancements

The Offline App Onboarding Wizard updates help guide you with easy-to-follow prompts to select preconfigured landing page templates, and to generate sObject LWC quick actions.

**Where:** This change applies to the Salesforce Mobile App Plus for iOS and Android on phone and tablets in all editions, except Database.com.

**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.

**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**.

You can use the Onboarding Wizard to select a preconfigured landing page template. Each landing page template has specific objects and quick actions. Based on the sObjects that are configured in your landing page template selection, the Onboarding Wizard can help generate any missing LWC quick actions.

SEE ALSO:

[GitHub: Offline App Developer Starter Kit](#)

[Mobile and Offline Developer Guide: Customize the Offline Experience for the Salesforce Mobile App \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Customize The Landing Page \(can be outdated or unavailable during release preview\)](#)

## Offline App Developer Starter Kit Enhancements

The Offline App Developer Starter Kit updates contain predefined Lightning web component (LWC) code samples to help configure your offline app.

**Where:** This change applies to the Salesforce Mobile App Plus for iOS and Android on phone and tablets in all editions, except Database.com.

**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.

**How:** Each predefined LWC code sample in the [Offline App Developer Starter Kit](#) contains a Markdown (.md) file in the docs folder that describes how to configure the code sample for your use case.

- [Offline Lookups](#)
- [Related Records](#)
- [Barcode Scanner](#)
- [Custom Object](#)

SEE ALSO:

[GitHub: Offline App Developer Starter Kit](#)

[Mobile Offline Developer Guide: Customize the Offline Experience for the Salesforce Mobile App](#)

## Defined Global Actions Now Primed for Offline Use

Global actions that are defined in the Actions card on the landing page are now primed and available for use offline.

**Where:** This change applies to the Salesforce Mobile App Plus for iOS and Android on phone and tablets in all editions, except Database.com.

**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.

SEE ALSO:

[Salesforce Help: Customize the Landing Page \(can be outdated or unavailable during release preview\)](#)

## Better Error Handling When Quick Actions Haven't Been Deployed

Helpful error messaging appears when quick actions haven't been deployed for objects that are configured in the briefcase.

**Where:** This change applies to the Salesforce Mobile App Plus for iOS and Android on phone and tablets in all editions, except Database.com.

**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.

SEE ALSO:

[Salesforce Help: Get Started With Mobile Offline \(can be outdated or unavailable during release preview\)](#)

## Preview Mobile Actions on Record Pages Before Activating

When you create actions on record pages in Lightning App Builder, use the Phone preview option to see how they appear on mobile devices. The mobile preview also shows you if any actions aren't available on mobile devices.

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



## Use Dynamic Actions on Standard Objects on Mobile

Dynamic actions on mobile are no longer limited to custom objects. Use dynamic actions on standard objects on mobile devices. We delivered this feature thanks to your ideas on IdeaExchange.

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

SEE ALSO:

[IdeaExchange Delivered: Use Dynamic Actions with Standard Objects on Mobile](#)

## Mobile Publisher

Update your Android app's Firebase information to support push notifications. Use the BiometricsService API to require a biometric ID check for certain features of your app.

### [Avoid Disrupting Your Mobile Publisher Android App's Push Notifications](#)

Because of a change in how Google handles push notifications for Android apps, Mobile Publisher requires new information from your app's Google Firebase project. To make sure that there's no disruption to your Android app's push notifications, upload your app's Firebase Admin SDK private key and Firebase config file to Setup for Mobile Publisher.

### [Add Biometric ID Checks for Mobile Publisher for Experience Cloud App Features](#)

Develop a Lightning web component with the BiometricsService API (Nimbus plugin) to prompt your app users to confirm their identity using a device's biometrics functionality. Your custom Lightning web component can prompt a biometric ID check as an added layer of protection, tailored to your app's requirements.



### [Set the Default Method for How Your Mobile Publisher for Experience Cloud App Opens URLs \(Beta\)](#)

Configure your app to open these links in an in-app web view, an in-app browser, an external browser, or an in-app browser that shares cookies with your app's web view. For any exceptions, you can specify certain URLs to open using a method other than the default method that you select. Previously, the default method for opening URLs was a pilot feature that was enabled upon request. The default method for opening URLs is now a beta feature that's available in Setup for Mobile Publisher.

## Avoid Disrupting Your Mobile Publisher Android App's Push Notifications

Because of a change in how Google handles push notifications for Android apps, Mobile Publisher requires new information from your app's Google Firebase project. To make sure that there's no disruption to your Android app's push notifications, upload your app's Firebase Admin SDK private key and Firebase config file to Setup for Mobile Publisher.

**Where:** This change applies to Mobile Publisher Android apps in all app versions. Setup for Mobile Publisher is available in Lightning Experience in Enterprise, Performance, and Unlimited editions.

**How:** Get the required information and files from your Firebase project in the Google Firebase Console. Then submit the information to your app's Setup for Mobile Publisher project.


### SEE ALSO:

[Salesforce Help: Register Your Firebase App to Enable Mobile Publisher Android Push Notifications \(can be outdated or unavailable during release preview\)](#)

[Firebase FAQ: FCM features deprecated in June 2023](#)

## Add Biometric ID Checks for Mobile Publisher for Experience Cloud App Features

Develop a Lightning web component with the BiometricsService API (Nimbus plugin) to prompt your app users to confirm their identity using a device's biometrics functionality. Your custom Lightning web component can prompt a biometric ID check as an added layer of protection, tailored to your app's requirements.

 **Note:** The biometric ID check is local to the device and validates the identity of the user, but the biometric ID check doesn't authenticate the user to the service.

Building biometrics-based functionality using the BiometricsService API only works in the mobile app, not the web version on mobile or desktop.

**Where:** This feature is available in Mobile Publisher for Experience Cloud apps in Android and iOS app versions 12.0 and later.

**How:** Develop a Lightning web component that uses the BiometricsService API according to your app's scenarios for biometric ID checks. Then use Experience Builder to add the component to the applicable pages on your Experience Cloud site.

### SEE ALSO:

[Salesforce Help: Identify a User with a Mobile Device's Biometrics Capabilities \(can be outdated or unavailable during release preview\)](#)

[Mobile and Offline Developer Guide: Use Mobile Device Features in Mobile Apps \(can be outdated or unavailable during release preview\)](#)

[Mobile and Offline Developer Guide: Access a Mobile Device's Biometrics Capabilities \(can be outdated or unavailable during release preview\)](#)

## Set the Default Method for How Your Mobile Publisher for Experience Cloud App Opens URLs (Beta)

Configure your app to open these links in an in-app web view, an in-app browser, an external browser, or an in-app browser that shares cookies with your app's web view. For any exceptions, you can specify certain URLs to open using a method other than the default method that you select. Previously, the default method for opening URLs was a pilot feature that was enabled upon request. The default method for opening URLs is now a beta feature that's available in Setup for Mobile Publisher.

**Where:** This change applies to apps created with Mobile Publisher for your Experience Cloud [Aura and LWR sites](#) in Enterprise, Performance, Unlimited, and Developer editions. Setup for Mobile Publisher is available in Lightning Experience in Enterprise, Performance, and Unlimited editions.

**How:** In your app's Setup for Mobile Publisher project, configure the settings in the URL Management section.

SEE ALSO:

[Salesforce Help: Manage How URLs Open from Your App \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Test How URLs Open in the Playground Publisher App \(can be outdated or unavailable during release preview\)](#)

## Briefcase Builder

Review all rules and filters on a briefcase.

[View All Rules and Filters on a Briefcase](#)

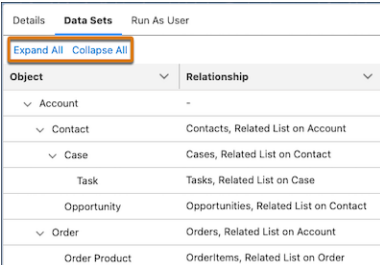
You can now expand or collapse all rules when you view the details of a briefcase in Briefcase Builder. The Expand All and Collapse All buttons are available on the Data Sets and Run As User tabs of a briefcase's details.

## View All Rules and Filters on a Briefcase

You can now expand or collapse all rules when you view the details of a briefcase in Briefcase Builder. The Expand All and Collapse All buttons are available on the Data Sets and Run As User tabs of a briefcase's details.

**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 and Salesforce Mobile App Plus.

**How:** From Setup, in the Quick Find box, enter *Briefcase Builder*, and then select **Briefcase Builder**. Click on a briefcase to view its details. Then click the **Data Sets** tab or **Run As User** tab to expand or collapse all rules.



Details		Data Sets	Run As User
		Expand All	Collapse All
Object	Relationship		
Account	-		
Contact	Contacts, Related List on Account		
Case	Cases, Related List on Contact		
Task	Tasks, Related List on Case		
Opportunity	Opportunities, Related List on Contact		
Order	Orders, Related List on Account		
Order Product	OrderItems, Related List on Order		

SEE ALSO:

[Salesforce Help: Validate Briefcase Settings \(can be outdated or unavailable during release preview\)](#)

## General Mobile Updates

Enter new Google Firebase information to support push notifications on Android mobile connected apps.

### [Update Your Android Mobile Connected App's Information for Push Notifications](#)

Because of a change in how Google handles push notifications for apps, Android mobile connected apps now collect the Admin SDK private key and project ID from a Google Firebase project. To make sure that there's no disruption to the delivery of your app's notifications, submit the Firebase Admin SDK private key and project ID required for the new Firebase Cloud Messaging API (HTTP v1).

## Update Your Android Mobile Connected App's Information for Push Notifications

Because of a change in how Google handles push notifications for apps, Android mobile connected apps now collect the Admin SDK private key and project ID from a Google Firebase project. To make sure that there's no disruption to the delivery of your app's notifications, submit the Firebase Admin SDK private key and project ID required for the new Firebase Cloud Messaging API (HTTP v1).

**Where:** This change applies to mobile connected apps with Android push notifications. Connected apps can be created in Group, Professional, Enterprise, Essentials, Performance, Unlimited, and Developer editions.

**How:** Get the required information from your Firebase project in the Google Firebase Console. Then, submit the information to your mobile connected app's settings in App Manager.

SEE ALSO:

[Salesforce Help: Configure Android Push Notifications \(can be outdated or unavailable during release preview\)](#)

[Firebase FAQ: FCM features deprecated in June 2023](#)

## OmniStudio

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In the Spring '24 release, OmniStudio Standard (when the Managed Package Runtime setting is disabled) supports features from OmniStudio for Vlocity, including specifying XML publish options for FlexCards, tracking use of OmniStudio components, updating addresses with Google Maps, sending documents on behalf of others, and migrating all versions of OmniStudio components.

### [Automatic Upgrades for Managed Packages](#)

Starting in Spring '24, we added the OmniStudio managed package to the automatic upgrade process. This process aligns with the Salesforce seasonal release cycle, where new features are delivered three times a year (Summer, Winter, and Spring). With automatic upgrades, you also get early access to upcoming releases in your sandbox preview environment.

### [Display FlexCards with More Options](#)

When a designer publishes a FlexCard, they now have more options for where and how the FlexCard is displayed. For example, a FlexCard can publish to the Lightning App Builder, the Experience Builder, or the Salesforce mobile app.

### [Improve Workflows with Usage Data](#)

Wish you could see how your OmniStudio components are used? OmniAnalytics gives data to your designers about how people interact with your OmniScripts and FlexCards. Your designers can pull the data into Salesforce or into third-party tools, such as Google Analytics.

### [Migrate All Versions of OmniStudio Components](#)

When migrating from OmniStudio for Vlocity to OmniStudio Standard, you can now migrate all versions of an OmniStudio component, not just the active version. In the OmniStudio Migration Tool, you can migrate older versions of components as well as versions in progress.

### [Save Time Activating Components After You Change Runtimes](#)

When you change from the managed package runtime to the standard runtime, all active OmniStudio components remain active. Previously, if you switched to the standard runtime, some FlexCards, OmniScripts, Omnistudio Data Mappers, and Integration Procedures were deactivated.

### [Send Documents on Behalf of Others](#)

For integration with services such as DocuSign, send on behalf of others (SOBO) allows one user to send documents for other users in an organization. This feature simplifies authentications: One authenticated user instead of many.

### [Use OmniOut on Mobile Devices](#)

With OmniOut, your OmniScripts and FlexCards can run on iOS and Android devices. For Winter '24, most OmniScript settings and actions work on OmniOut for both mobile platforms. But some settings and actions aren't supported currently, such as toast messages, opening record pages and Experience site logins, and email with a link.

### [OmniStudio Minor Releases](#)

Find out about bug fixes, minor updates, and known issues about OmniStudio made after Spring '24 and before Summer '24.

## Automatic Upgrades for Managed Packages

Starting in Spring '24, we added the OmniStudio managed package to the automatic upgrade process. This process aligns with the Salesforce seasonal release cycle, where new features are delivered three times a year (Summer, Winter, and Spring). With automatic upgrades, you also get early access to upcoming releases in your sandbox preview environment.

**Where:** Automatic upgrades are required starting in Spring '24.

**Who:** All OmniStudio managed packages.

**Why:** Automatic upgrades keep your sandboxes and production environments current with the latest features, let you test customizations and new features in your sandboxes, and provide regular patch updates with performance, stability, and security improvements.

If you're looking for installation links for previous versions, contact your support team for help.

## Display FlexCards with More Options

When a designer publishes a FlexCard, they now have more options for where and how the FlexCard is displayed. For example, a FlexCard can publish to the Lightning App Builder, the Experience Builder, or the Salesforce mobile app.

**Where:** Lightning Experience, Experience Cloud sites, and all versions of Enterprise, Performance, and Unlimited editions where OmniStudio is enabled.

**Who:** OmniStudio customers who use the standard runtime: In Setup in OmniStudio Settings, the Managed Package Runtime setting is disabled.

**How:** The Editor tab in the Publish Options window is available by default. For a list of the metadata options, see [XML Configuration File Elements](#).

## Improve Workflows with Usage Data

Wish you could see how your OmniStudio components are used? OmniAnalytics gives data to your designers about how people interact with your OmniScripts and FlexCards. Your designers can pull the data into Salesforce or into third-party tools, such as Google Analytics.

**Where:** This change applies to Lightning Experience and Enterprise, Performance, and Unlimited editions where OmniStudio is enabled.

**Who:** This feature is available to OmniStudio customers who use the standard runtime: In Setup, in OmniStudio Settings, the Managed Package Runtime setting is disabled.

**How:** Complete the configuration tasks for OmniAnalytics, including selecting the OmniScripts and FlexCards to collect data for.

Not available in Spring '24: guest user access.

If you're new to OmniStudio with the Managed Package Runtime setting disabled, you can use OmniStudio OmniAnalytics. If you're using OmniStudio with the Managed Package Runtime setting enabled, watch for future updates and continue to use Vlocity OmniAnalytics in the managed package runtime.

**Why:** Here's a summary of the differences between Vlocity OmniAnalytics and OmniStudio OmniAnalytics.

Feature	Vlocity OmniAnalytics	OmniStudio OmniAnalytics
Managed Package Runtime	Enabled	Disabled
Granting Access	OmniStudio Admin permission set, OmniAnalytics Apex classes in user profile	OmniStudio Admin permission set for internal analytics
Enabling OmniAnalytics	Custom Settings	OmniAnalytics Settings
Data Storage	Custom Platform Event or Object	Standard Platform Event or Decision Explainer Service
Messaging Framework in OmniScripts	External analytics only	Internal and external analytics
Enable Tracking in OmniScript Setup	Tracking Service for OmniScripts, internal and external analytics for FlexCards	External analytics for OmniScripts
Editing OmniAnalytics in Setup	Requires closing and reopening the browser	Requires refreshing the browser
Lightning App Page Configuration	Tracking Manager component	OmniScript and FlexCard wrapper components
Objects	VlocityTrackingGroup__c, VlocityTrackingComponent__c, VlocityWebTrackingConfiguration__c, VlocityWebTrackingEventType__c, VlocityTrackingEntry__c, VlocityTrackingEvent__e	OmniTrackingGroup, OmniTrackingComponentDef, OmniExtTrackingDef, OmniExtTrackingEventDef, OmniTrackingEvent
Google Analytics and Ecommerce API Version	Universal Analytics	Google Analytics 4

## Migrate All Versions of OmniStudio Components

When migrating from OmniStudio for Vlocity to OmniStudio Standard, you can now migrate all versions of an OmniStudio component, not just the active version. In the OmniStudio Migration Tool, you can migrate older versions of components as well as versions in progress.

**Where:** Lightning Experience, Experience Cloud sites, and all versions of Enterprise, Performance, and Unlimited editions where OmniStudio is enabled.

**Who:** OmniStudio customers who migrate data from the custom metadata to the metadata runtime: In Setup in OmniStudio Settings, the **Managed Package Runtime** setting is enabled.

**How:** The `-allVersions` option is available by default for the OmniStudio Migration Tool. To migrate only the active versions, exclude this option.

## Save Time Activating Components After You Change Runtimes

When you change from the managed package runtime to the standard runtime, all active OmniStudio components remain active. Previously, if you switched to the standard runtime, some FlexCards, OmniScripts, Omnistudio Data Mappers, and Integration Procedures were deactivated.

**Where:** Lightning Experience, Experience Cloud sites, and all versions of Enterprise, Performance, and Unlimited editions where OmniStudio is enabled.

**Who:** OmniStudio customers who use the standard runtime: In Setup in OmniStudio Settings, the Managed Package Runtime setting is enabled.

**Why:** If you're using OmniStudio in the managed package runtime, you might have OmniStudio components used in a production org. You need to limit the impact of changing to the standard runtime and ensure as little downtime as possible.

SEE ALSO:

[Salesforce Help: Disable Managed Package Runtime](#)

## Send Documents on Behalf of Others

For integration with services such as DocuSign, send on behalf of others (SOBO) allows one user to send documents for other users in an organization. This feature simplifies authentications: One authenticated user instead of many.

**Where:** Lightning Experience, Experience Cloud sites, and all versions of Enterprise, Performance, and Unlimited editions where OmniStudio is enabled.

**Who:** OmniStudio customers who use the standard runtime: In Setup in OmniStudio Settings, the Managed Package Runtime setting is disabled.

**How:** To send on behalf of others is available, set up an OAuth 2.0 Named Credential to connect to DocuSign. You then select a user who can send on behalf of other and the other users.

SEE ALSO:

[Salesforce Help: Setup Send on Behalf of Another User](#)

## Use OmniOut on Mobile Devices

With OmniOut, your OmniScripts and FlexCards can run on iOS and Android devices. For Winter '24, most OmniScript settings and actions work on OmniOut for both mobile platforms. But some settings and actions aren't supported currently, such as toast messages, opening record pages and Experience site logins, and email with a link.

**Where:** Lightning Experience, Experience Cloud sites, and all versions of Enterprise, Performance, and Unlimited editions where OmniStudio is enabled.

**Who:** OmniStudio customers who migrate data from the custom metadata to the metadata runtime: In Setup in OmniStudio Settings, the **Managed Package Runtime** setting is disabled.

**How:** You must install OmniOut, integrate it with your application, and deploy your application.

SEE ALSO:

[Salesforce Help: OmniOut Support for Native Mobile](#)

## OmniStudio Minor Releases

Find out about bug fixes, minor updates, and known issues about OmniStudio made after Spring '24 and before Summer '24.

[OmniStudio Minor Releases](#)

## Revenue

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Automate and scale your revenue operations with a robust portfolio of Revenue Cloud products. Introducing Revenue Lifecycle Management—meticulously crafted through customer collaboration to enable product-to-cash automation on one trusted platform. Salesforce CPQ offers improved security with an integration user. Salesforce Billing provides enhanced error logs and a batch invoice run cleanup process so that it's easier and faster to generate correct invoices. And Subscription Management includes security and usability improvements so that you can manage recurring revenue operations with ease.

### [Revenue Lifecycle Management](#)

Revenue Lifecycle Management is a new end-to-end revenue solution built on the power of the Salesforce platform. It provides a single, unified system that brings revenue and CRM processes together so you can rapidly launch products with both one-time sale and subscription services as well as automate underlying business processes at scale. Revenue Lifecycle Management is available starting on February 13, 2024.

### [Salesforce CPQ](#)

Salesforce CPQ offers enhanced security with a dedicated integration user with a short-lived access token.

### [Subscription Management](#)

Streamline your recurring revenue operations with improvements to the Generate Invoice API in Subscription Management. Ensure that OrderToAsset event subscribers continue to receive event notifications by updating their user permissions.

## Revenue Lifecycle Management

Revenue Lifecycle Management is a new end-to-end revenue solution built on the power of the Salesforce platform. It provides a single, unified system that brings revenue and CRM processes together so you can rapidly launch products with both one-time sale and subscription services as well as automate underlying business processes at scale. Revenue Lifecycle Management is available starting on February 13, 2024.

### [Product Catalog Management \(Generally Available\)](#)

Product Catalog Management, which is now generally available, is a unified interface through which your catalog administrators and product designers can craft and manage an entire product portfolio at unparalleled market speed. No more cumbersome processes or time-consuming tasks, it's time to streamline your workflow and focus on what truly matters—delivering exceptional products to the market. With robust components such as attributes, product classifications, simple and bundled products, and rules, the creation and management of an entire product catalog were never this easy.

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

Use Salesforce Pricing to provide your users with a comprehensive and reliable pricing solution. Create customized price adjustment schedules, and define discounts and obtain accurate prices for your entire product portfolio. Calculate your product's final net price by using inbuilt pricing elements in pricing procedures, and customize how you want to view your pricing data.

### [Product Configurator \(Generally Available\)](#)

Configure products that meet your business requirements. Product Configurator provides an optimized and intuitive user interface to select the right options for simple and complex products. You can view product-related information such as options, attributes, pricing, and purchasing options in a customizable layout. Sales reps can use this layout to effortlessly configure products.

### [Quote and Order Capture \(Generally Available\)](#)

Create quotes and capture orders with the right products and the right prices in any channel. Whether it's an initial, amendment, or renewal sale, Quote and Order Capture aligns your products and prices for a seamless sales experience. Quote and Order Capture supports the complexity of subscription lifecycles, ensuring end-to-end integrity from quotes and orders to contracts, assets, amendments, and renewals. By delivering omnichannel experiences, meet your buyers and sellers in any channel with cross-sales experiences with other Salesforce products such as Partner Relationship Management and Commerce Cloud.

### [Asset Lifecycle \(Generally Available\)](#)

Provide sales reps with insights into customer assets and help your company increase customer lifetime value by using Revenue Lifecycle Management. Add the improved Asset Viewer component to account record pages, so sales reps can see a consolidated list of all assets that belong to an account. Add the Asset State Period Chart and Asset Summary components to partner communities, so your company's partners can quickly see key information about customer assets. Manage asset lifecycles using amendments, renewals, or cancellations to meet your customers' business needs.

#### SEE ALSO:

[Salesforce Help: Get Started with Revenue Lifecycle Management](#)

[Revenue Lifecycle Management Developer Guide](#)

## New and Enhanced Common Features for Industries

Revenue Lifecycle Management includes access to some features that are also available across clouds and products in Industries. Use these features to extend and customize Revenue Lifecycle Management based on your business needs.

- [Business Rules Engine](#)

Call the ready-to-use executable expression set templates from Flow or other calling processes. Create precise rules with the operators and functions that consider null values. Use the enhancements in decision tables to simplify and streamline lookups. Show your users more targeted and nuanced explanations for expression set version step results with the enhancements in Decision Explainer.

- [Context Service](#)

Simplify the sharing and consumption of data for business applications by using Context Service. Acting as a generic module, Context Service forms a layer between applications and procedures, enabling easy retrieval and utilization of data across various Industries clouds at every step of the digital process. Create context definitions to build a structure for efficient data access. Map the nodes and attributes defined in your definition to the right input data sources. Import and export context definitions between orgs. Invoke and hydrate context instances through invocable actions by using Salesforce Flows.

- [OmniStudio](#)

With OmniStudio, you can create experiences with guided interactions for your customers and agents and with data from your Salesforce org and external sources.

- [Salesforce Contracts](#)



Easily manage the end-to-end contract lifecycle, from contract authoring to contract activation, with Salesforce Contracts.

## Product Catalog Management (Generally Available)

Product Catalog Management, which is now generally available, is a unified interface through which your catalog administrators and product designers can craft and manage an entire product portfolio at unparalleled market speed. No more cumbersome processes or time-consuming tasks, it's time to streamline your workflow and focus on what truly matters—delivering exceptional products to the market. With robust components such as attributes, product classifications, simple and bundled products, and rules, the creation and management of an entire product catalog were never this easy.

Your customers can get frustrated and confused when they run into products that aren't available to them or for which they don't meet the eligibility criteria. They're most likely to purchase the products and offerings that are curated for them. The powerful qualification rules and qualification rule procedures in Product Catalog Management ensure that your users see only the products that are most suited for them.

When products are complex, it's difficult to remember the products that are compatible with one another and the attribute values that these products can take. Your product designers can validate the products and ensure their compatibility by using the predefined templates available with the Configuration Rules in Product Catalog Management.

Effortlessly define and manage the product lifecycle for every sales channel. From brick-and-mortar stores to ecommerce platforms and beyond, Product Catalog Management's intuitive interface ensures that your products are always perfectly aligned with your market strategy.

### [Increase Product Findability Through a Visual Product Catalog](#)

Product catalogs can have a hierarchical structure of catalog categories and subcategories. A well thought out catalog structure can increase the findability of your products manifold when you organize your products such that they belong to the right catalog category or subcategory.

### [Reuse Attributes to Define Similar Products At Scale](#)

Your product designers can create attributes one time, optionally group them into attribute categories, and then use them across a multitude of products in your catalog.

### [Accelerate Product Creation Through Product Classifications](#)

Your product catalog can have many products that are similar but differ in a few characteristics. The creation of such products one by one can be time-consuming. A product classification is a template that you can use to create products with similar attributes. Products created from product classifications automatically inherit all attributes from the classification. Product designers can customize product attributes as necessary.

### [Effortlessly Design Products Of Varying Levels Of Complexity](#)

Use the rich and intuitive interface in Product Catalog Management to effortlessly create simple products and products with a complex hierarchical structure. Moreover, while you configure a complex product, you can group similar products together, and change the component product characteristics and quantities.

### [Model Products to Represent Industry-Specific Product Types](#)

Use product specification types to give your products the terminology that's unique to your industry. Define a specification type for the products that are specific to your industry and create corresponding product2 record types. While you can use the specification types that are shipped for your industry, you can also create custom product specification types. Additionally, use APIs to query products by product specification type.

### [Define Business Rules For Product and Product Category Eligibility and Availability](#)

Show the right products to the right users through the right sales channels and reduce fallout. Use Qualification Rules in Product Catalog Management to define the eligibility criteria for products and product categories.

### [Define Business Rules For Product Validation and Compatibility](#)

When you configure products for sale, you want to ensure that all your products have a valid configuration and are compatible with other products in the offering. With configuration rules in Product Catalog Management, you can be sure that your users are selecting the right set of products and that the product configuration aligns with the business needs and standards. Configuration rules streamline the product configuration experience and diminish any likelihood of configuration errors. You eliminate fallout due to faulty product configurations when you use the validation, exclusion, and require rules. A perfect product configuration ensures that your quotes or orders are accurate and that the customer experience is smooth.

### [Customize the Product Catalog Management Home Page with Lightning Web Components](#)

Use the Product Catalog Management app home page to manage attributes, products, catalogs, and rules. Extend these capabilities by building your own custom components and customizing the existing components through the Product Catalog Management Home Page in Lightning App Builder.

### [Use APIs to Programmatically Access Your Product Data](#)

Use the Product Catalog Management APIs to fetch the details of catalogs, catalog categories, and products. Get a list of all catalogs, categories, and products, and also get additional details about specific catalogs, catalog categories, and products.

### [Scratch Org Features](#)

Use the `ProductCatalogManagementAddOn` feature to get read-write access to Product Catalog Management features and objects in your scratch orgs. Use the `ProductCatalogManagementViewerAddOn` feature to get read access to Product Catalog Management features and objects in your scratch orgs. Use the `ProductCatalogManagementPCAddOn` feature to enable Product Catalog Management for Partner Community users in scratch orgs. To use the `ProductCatalogManagementAddOn`, `ProductCatalogManagementViewerAddOn`, and `ProductCatalogManagementPCAddOn` features, add these features to your scratch org definition file.

### [New and Changed Objects in Product Catalog Management](#)

Do more with the new and changed objects in Product Catalog Management.

### [New Tooling API Objects in Product Catalog Management](#)

Do more with these new tooling API objects in Product Catalog Management.

### [New Metadata Types in Product Catalog Management](#)

Make the most of the new metadata types of Product Catalog Management.

### [New Connect REST API Resources](#)

Learn more about the resources available with Product Catalog Management.

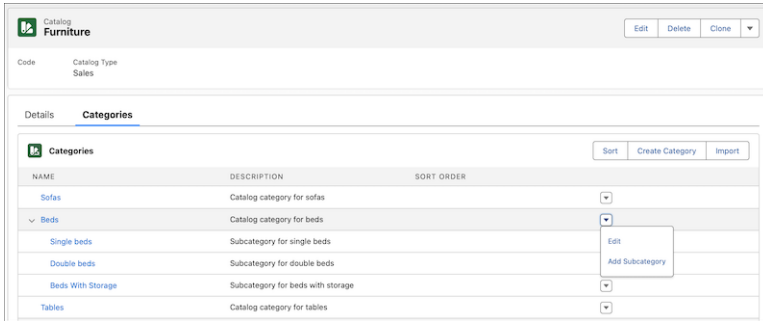
## Increase Product Findability Through a Visual Product Catalog

Product catalogs can have a hierarchical structure of catalog categories and subcategories. A well thought out catalog structure can increase the findability of your products manifold when you organize your products such that they belong to the right catalog category or subcategory.

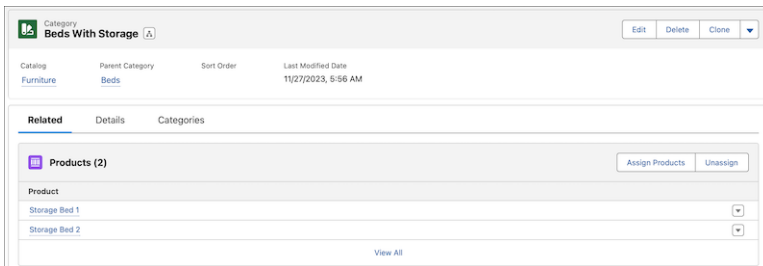
**Where:** This feature is available in Lightning Experience in Developer, Enterprise, and Unlimited editions where Revenue Lifecycle Management is enabled.

**When:** Revenue Lifecycle Management is available starting on February 13, 2024.

**Why:** In this example, we have a product catalog that's called Furniture. This catalog has catalog categories such as Sofas, Beds, and Tables. The Beds category has subcategories such as Single beds, Double beds, and Beds With Storage.



You can assign products such as Storage Bed 1 and Storage Bed 2 to the catalog subcategory, Beds With Storage. Users can easily find the storage beds that they're looking for when they search for them under Beds With Storage.



SEE ALSO:

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

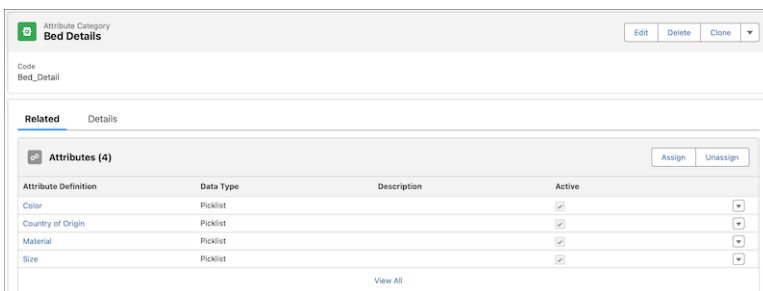
## Reuse Attributes to Define Similar Products At Scale

Your product designers can create attributes one time, optionally group them into attribute categories, and then use them across a multitude of products in your catalog.

**Where:** This feature is available in Lightning Experience in Developer, Enterprise, and Unlimited editions where Revenue Lifecycle Management is enabled.

**When:** Revenue Lifecycle Management is available starting on February 13, 2024.

**Why:** Attributes are the characteristics of your products. These characteristics can be common to a large number of products that are different yet similar. In this example, the admin has created multiple attributes that are assigned to an attribute category called Bed Details.



Use these attributes to define these types of similar products—Single beds, Double beds, and Beds With Storage. Product designers can expedite product definition by creating these attributes one time and then using them individually or through the attribute category to define similar products in the catalog.

SEE ALSO:

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

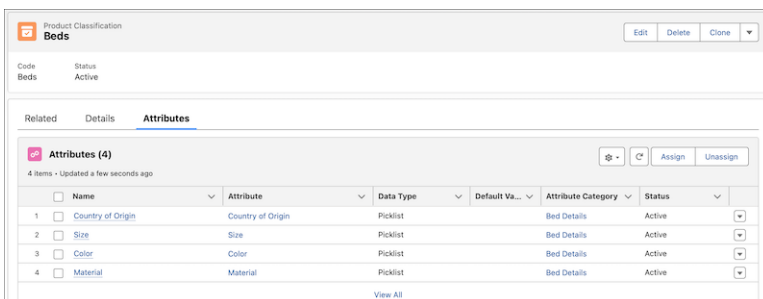
## Accelerate Product Creation Through Product Classifications

Your product catalog can have many products that are similar but differ in a few characteristics. The creation of such products one by one can be time-consuming. A product classification is a template that you can use to create products with similar attributes. Products created from product classifications automatically inherit all attributes from the classification. Product designers can customize product attributes as necessary.

**Where:** This feature is available in Lightning Experience in Developer, Enterprise, and Unlimited editions where Revenue Lifecycle Management is enabled.

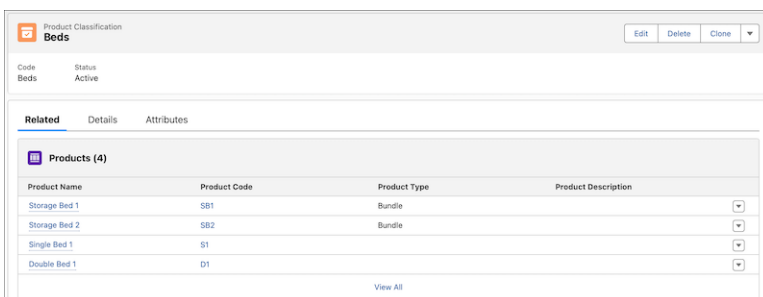
**When:** Revenue Lifecycle Management is available starting on February 13, 2024.

**Why:** In this example, a product classification called Beds has attributes such as Size, Color, Material, and Country of Origin.



Name	Attribute	Data Type	Default Va...	Attribute Category	Status
<input type="checkbox"/> Country of Origin	Country of Origin	Picklist		Bed Details	Active
<input type="checkbox"/> Size	Size	Picklist		Bed Details	Active
<input type="checkbox"/> Color	Color	Picklist		Bed Details	Active
<input type="checkbox"/> Material	Material	Picklist		Bed Details	Active

Product designers can use this classification to create products such as Storage Bed 1, Storage Bed 2, Single Bed 1, and Double Bed 1. These products automatically inherit all the attributes from the Beds product classification. The product designer can then configure these attributes as needed in the context of the product.



Product Name	Product Code	Product Type	Product Description
Storage Bed 1	SB1	Bundle	
Storage Bed 2	SB2	Bundle	
Single Bed 1	S1		
Double Bed 1	D1		

SEE ALSO:

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

## Effortlessly Design Products Of Varying Levels Of Complexity

Use the rich and intuitive interface in Product Catalog Management to effortlessly create simple products and products with a complex hierarchical structure. Moreover, while you configure a complex product, you can group similar products together, and change the component product characteristics and quantities.

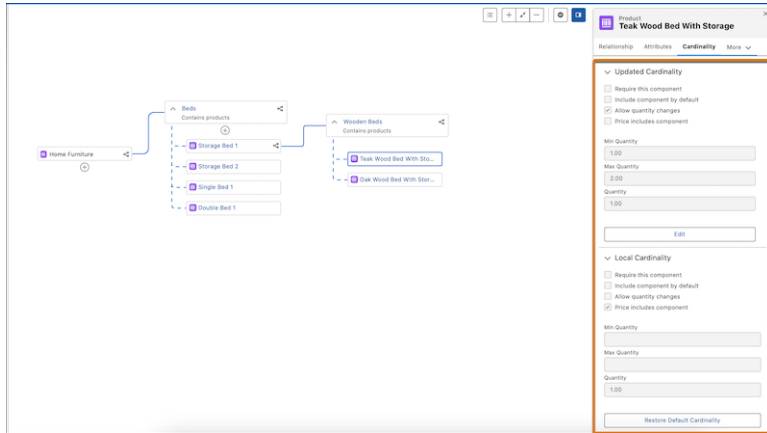
**Where:** This feature is available in Lightning Experience in Developer, Enterprise, and Unlimited editions where Revenue Lifecycle Management is enabled.

**When:** Revenue Lifecycle Management is available starting on February 13, 2024.

**Why:** Your product designers can add components (1) to the product hierarchy. They can define product cardinality and group cardinality, override product attributes in the context of the product bundle (2), and define component relationships. They can also exclude product and group components (3) from the second level onwards so that the components are unavailable for selection in the runtime.

Additionally, product designers can override the product and group cardinality for products and groups from the second level onwards.

They can also edit the overridden cardinality or delete the overridden cardinality to revert to the original product or group cardinality.



SEE ALSO:

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

## Model Products to Represent Industry-Specific Product Types

Use product specification types to give your products the terminology that's unique to your industry. Define a specification type for the products that are specific to your industry and create corresponding product2 record types. While you can use the specification types that are shipped for your industry, you can also create custom product specification types. Additionally, use APIs to query products by product specification type.

**Where:** This feature is available in Lightning Experience in Developer, Enterprise, and Unlimited editions where Revenue Lifecycle Management is enabled.

**When:** Revenue Lifecycle Management is available starting on February 13, 2024.

SEE ALSO:

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

## Define Business Rules For Product and Product Category Eligibility and Availability

Show the right products to the right users through the right sales channels and reduce fallout. Use Qualification Rules in Product Catalog Management to define the eligibility criteria for products and product categories.

**Where:** This feature is available in Lightning Experience in Developer, Enterprise, and Unlimited editions where Revenue Lifecycle Management is enabled.

**When:** Revenue Lifecycle Management is available starting on February 13, 2024.

**Why:** Ensure that your users see only those products or product categories that they're eligible for, when they make a purchase through specific sales channels. Qualify or disqualify products and product categories on the basis of criteria such as user location, account attributes, and other related information.

SEE ALSO:

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

## Define Business Rules For Product Validation and Compatibility

When you configure products for sale, you want to ensure that all your products have a valid configuration and are compatible with other products in the offering. With configuration rules in Product Catalog Management, you can be sure that your users are selecting the right set of products and that the product configuration aligns with the business needs and standards. Configuration rules streamline the product configuration experience and diminish any likelihood of configuration errors. You eliminate fallout due to faulty product configurations when you use the validation, exclusion, and require rules. A perfect product configuration ensures that your quotes or orders are accurate and that the customer experience is smooth.

**Where:** This feature is available in Lightning Experience in Developer, Enterprise, and Unlimited editions of Product Configurator where Revenue Lifecycle Management is enabled.

**When:** Revenue Lifecycle Management is available starting on February 13, 2024.

**Why:** Use validation rules to ensure that your products meet the specified criteria. These rules validate product attributes and ensure that the product adheres to business policies. Use exclusion rules to ensure that your users don't select conflicting products. Exclusion rules ensure product accuracy and mitigate the risks of incompatible product combinations. Use require rules to ensure that products that depend on others are always selected together. Require rules ensure that your product configuration is logical and cohesive. When you set up configuration rules, you also define what messages must be shown to the agents or sales reps when the products don't meet the configuration rule criteria. Your agents or sales reps can use the messages to rectify the product configuration and significantly reduce the product time to market.

SEE ALSO:

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

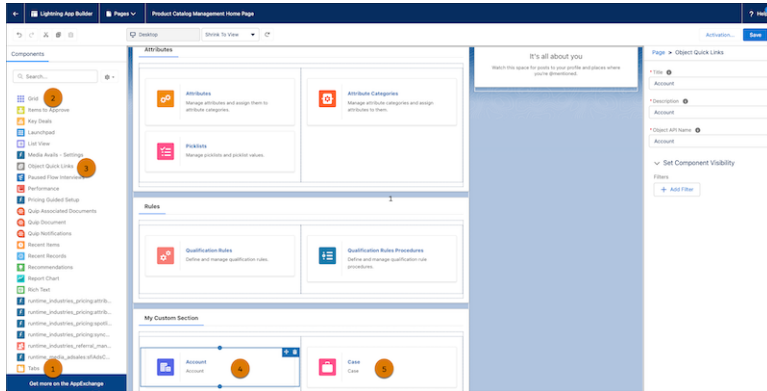
## Customize the Product Catalog Management Home Page with Lightning Web Components

Use the Product Catalog Management app home page to manage attributes, products, catalogs, and rules. Extend these capabilities by building your own custom components and customizing the existing components through the Product Catalog Management Home Page in Lightning App Builder.

**Where:** This feature is available in Lightning Experience in Developer, Enterprise, and Unlimited editions where Revenue Lifecycle Management is enabled.

**When:** Revenue Lifecycle Management is available starting on February 13, 2024.

**How:** In this example, the admin uses the Tabs (1) component to create a My Custom Section. The admin then adds a two-column Grid (2) to the tab component. The admin uses the Object Quick Links (3) component to add the Account (4) and Case (5) objects to the grid columns.



SEE ALSO:

[Salesforce Help: Customize and Extend the Product Catalog Management Home Page](#) (can be outdated or unavailable during release preview)

## Use APIs to Programmatically Access Your Product Data

Use the Product Catalog Management APIs to fetch the details of catalogs, catalog categories, and products. Get a list of all catalogs, categories, and products, and also get additional details about specific catalogs, catalog categories, and products.

**Where:** This feature is available in Lightning Experience in Developer, Enterprise, and Unlimited editions where Revenue Lifecycle Management is enabled.

**When:** Revenue Lifecycle Management is available starting on February 13, 2024.

SEE ALSO:

[Salesforce Help: Product Catalog Management APIs](#) (can be outdated or unavailable during release preview)

## Scratch Org Features

Use the `ProductCatalogManagementAddOn` feature to get read-write access to Product Catalog Management features and objects in your scratch orgs. Use the `ProductCatalogManagementViewerAddOn` feature to get read access to Product Catalog Management features and objects in your scratch orgs. Use the `ProductCatalogManagementPCAddOn` feature to enable Product Catalog Management for Partner Community users in scratch orgs. To use the `ProductCatalogManagementAddOn`, `ProductCatalogManagementViewerAddOn`, and `ProductCatalogManagementPCAddOn` features, add these features to your scratch org definition file.

**Where:** This change applies to Developer and Enterprise scratch org editions.

**When:** Revenue Lifecycle Management is available starting on February 13, 2024.

SEE ALSO:

[Salesforce DX Developer Guide: Build Your Own Scratch Org Definition File](#) (can be outdated or unavailable during release preview)

## New and Changed Objects in Product Catalog Management

Do more with the new and changed objects in Product Catalog Management.



**Where:** This feature is available in Lightning Experience in Developer, Enterprise, and Unlimited editions where Revenue Lifecycle Management is enabled.

**When:** Revenue Lifecycle Management is available starting on February 13, 2024.

## New Objects

Here are the new objects in Product Catalog Management.

### Create attribute categories

Use the new `AttributeCategory` object.

### Associate attribute definitions with attribute categories

Use the new `AttributeCategoryAttribute` object.

### Create product classifications

Use the new `ProductClassification` object.

### Associate attribute definitions with product classifications

Use the new `ProductClassificationAttr` object.

### Configure or edit the attribute definitions associated with products

Use the new `ProductAttributeDefinition` object.

### Override product cardinality and product relationship information in the context of a product bundle

Use the new `ProductRelComponentOverride` object.

### Override the group cardinality in the context of a product bundle

Use the `ProductComponentGrpOverride` object.

### Create specification types for products

Use the new `ProductSpecificationType` object.

### Associate product record types with product specifications

Use the new `ProductSpecificationRecType` object.

### Create qualification rules for products

Use the new `ProductQualification` object.

### Create disqualification rules for products

Use the new `ProductDisqualification` object.

### Create qualification rules for product categories

Use the new `ProductCategoryQualification` object.

### Create disqualification rules for product categories

Use the new `ProductCategoryDisqual` object.

### Create configuration rules for products

Use the new `ProductConfigurationRule` object.

## Changed Objects

Here are the changed objects in Product Catalog Management.

### New Fields on Product2

Use the new `Based On` field to create products from a product classification.

Use the new `Help Text` field to add runtime help text for products.

Use the new `End Of Life Date` field to define the date after which the product is no longer supported.

Use the new `Specification Type` field to create specification types for products.

Use the new `Is Assetizable` field to persist product instances and ensure that they become a customer asset after the purchase.

#### **New Fields on ProductCatalog**

Use the new `Code` field to associate a unique ID with the product catalog.

Use the new `Description` field to provide a description for the product catalog.

Use the new `Effective Start Date` field to provide a date when the catalog is available to users.

Use the new `Effective End Date` field to provide a date when the catalog is unavailable to users.

Use the new `Catalog Type` field to determine the type of product catalog.

#### **New Fields on ProductSellingModelOption**

Use the new `Is Default` field to make a product selling model the default product selling model for a product.

#### **New Fields on ProductCategory**

Use the new `Code` field to associate a unique ID with the product category.

SEE ALSO:

[Salesforce Help: New and Changed Objects For Product Catalog Management \(can be outdated or unavailable during release preview\)](#)

## **New Tooling API Objects in Product Catalog Management**

Do more with these new tooling API objects in Product Catalog Management.

#### **Manage product specification types**

Use the new `ProductSpecificationType` metadata type.

#### **Manage product specification record types**

Use the new `ProductSpecificationRecType` object.

SEE ALSO:

[Revenue Lifecycle Management Developer Guide: Product Catalog Management Tooling API Objects \(can be outdated or unavailable during release preview\)](#)

## **New Metadata Types in Product Catalog Management**

Make the most of the new metadata types of Product Catalog Management.

### **Metadata Types**

#### **Manage product specification types**

Use the new `ProductSpecificationType` metadata type.

#### **Manage product specification record types**

Use the new `ProductSpecificationRecType` metadata type.

SEE ALSO:

[Revenue Lifecycle Management Developer Guide: Product Catalog Management Metadata API Types \(can be outdated or unavailable during release preview\)](#)

## New Connect REST API Resources

Learn more about the resources available with Product Catalog Management.

### Retrieve, search, filter, or sort catalog records

Make a POST request to the `/connect/pcm/catalogs` resource.

New request body: Catalog Input

New response body: Catalogs Output

### Retrieve details of catalog records based on a catalog ID

Make a GET request to the `/connect/pcm/catalogs/{catalogId}` resource.

New response body: Catalogs Output

### Retrieve the root-level categories of a catalog based on a catalog ID, or subcategories based on a parent category

Make a GET request to the `/connect/pcm/catalogs/{catalogId}/categories` resource.

New response body: Categories Output

### Retrieve details of individual category records based on a category ID

Make a GET request to the `/connect/pcm/categories/{categoryId}` resource.

New response body: Categories Output

### Retrieve products based on a catalog ID, or retrieve products based on a specified product classification ID

Make a POST request to the `/connect/pcm/products` resource.

New request parameter: `productClassificationId`

New request body: Product Input

New response body: Products Output

### Retrieve details of individual product records or a bundle based on a product ID

Make a GET request to the `/connect/pcm/products/{productId}` resource.

New response body: Products Output

#### SEE ALSO:

[Revenue Lifecycle Management Developer Guide: Product Catalog Management Business APIs](#)(can be outdated or unavailable during release preview)

## Salesforce Pricing (Generally Available)

Use Salesforce Pricing to provide your users with a comprehensive and reliable pricing solution. Create customized price adjustment schedules, and define discounts and obtain accurate prices for your entire product portfolio. Calculate your product's final net price by using inbuilt pricing elements in pricing procedures, and customize how you want to view your pricing data.

### [Manage Pricing Policies and Processes Easily by Using Salesforce Pricing](#)

Efficiently manage all your pricing processes in one centralized location, from creating products to calculating and applying discounts. Salesforce Pricing provides predefined objects, pricing recipes, and pricing procedures. Pricing procedures handle complex pricing policies that involve frequently changing discounts, promotions, and other additions or deductions. You can also customize objects to determine various discounts and prices, ensuring accurate pricing for all products.

### [Perform Complex Price Calculations Using a Recipe](#)

Calculating a product's price when considering discounts and other factors by creating a pricing recipe. Associate data from selected objects with lookup tables that have the necessary variables to enforce pricing policies. You can then apply the pricing recipe to pricing procedures that calculate a product's price. Each org can only have one active recipe at a time.

### [Track Your Products by Using Price Books and Price Book Entries](#)

Define pricing for your products by creating and organizing multiple price books using Salesforce Pricing. Use the predefined standard price book or create custom price books based on your business use case.

### [Control Pricing with Adjustment Schedules](#)

Create price adjustment schedules to apply discounts consistently to all your products based on quantity, a particular attribute, or when they're purchased in combination with other products. For example, you can adjust pricing based on the volume purchased within a selected date range. Offer bundle-based discounts by grouping different products to sell as a unit, such as purchasing a television with a service warranty.

### [View Your Pricing Data Your Way](#)

View data in a list or grid and choose which fields to display on the price adjustment schedule and price adjustment record pages.

### [View Product Discounts on a Single Calendar](#)

Quickly see the various discounts applied to a product running on a particular date or across a period on the Pricing Discount Calendar. Apply filters to zero in on particular pricing discounts. To get more information about the discount that was applied, click the corresponding record.

### [Build Context Definitions to Use Data Efficiently](#)

Simplify data access during a pricing process by configuring context definitions. A context definition contains the information necessary to load the required data and execute a pricing procedure.

### [Calculate Discounts Using Defined Pricing Elements](#)

Convert your pricing policies into pricing procedures that do all the work of calculating discounts for you. In Pricing Procedure Builder, add pricing elements that call the appropriate lookup tables to calculate discounts and final net price for your products.

### [Set a Product's Price on the Object Record Page](#)

Quickly set the price of a product using the pricing action button on the Quote, Order, Contract, Sales Agreement, Case, Opportunity, and Work Order object pages. The pricing action associates a context definition with a pricing procedure to ensure that the pricing data processed during the price calculation is stored in the mapped Salesforce object. For other object pages, you can add the button using a Lightning component.

### [Make Better Pricing Decisions Using Price Waterfall](#)

Get insights and reasons for every step of the pricing process by turning on the Price Waterfall view. For example, calculating the total cost of a product can require extra taxes. Or, you want to make sure that the discount that you're offering is correct. When viewing your pricing procedure using Price Waterfall, you see the price at every step, along with the reason for the addition or deduction. You can also customize the explanations for each pricing step.

### [Salesforce Pricing Flows](#)

Guide users through the pricing process, and use the automation tools to gather pricing data and create related records.

### [Manage Financial Decisions With Partner Communities](#)

Empower your partner community users to effortlessly create and oversee pricing decisions, confirm the charges and discounts on their purchases, and conveniently access all their pricing-related data through partner communities.

### [Configure Salesforce Pricing with Ease Using Guided Setup](#)

Get up and running quickly with the Pricing Guided Setup. You're walked through all the setup tasks needed to use Salesforce Pricing features.

### [New Objects in Salesforce Pricing](#)

Do more with these new Salesforce Pricing objects.

### [New Connect REST API Resources](#)

Learn more about the resources available with Salesforce Pricing.

### [New Invocable Actions](#)

Use the new invocable actions in Salesforce Pricing.

### [New Metadata Types](#)

Learn more about the new metadata types in Salesforce Pricing.

## Manage Pricing Policies and Processes Easily by Using Salesforce Pricing

Efficiently manage all your pricing processes in one centralized location, from creating products to calculating and applying discounts. Salesforce Pricing provides predefined objects, pricing recipes, and pricing procedures. Pricing procedures handle complex pricing policies that involve frequently changing discounts, promotions, and other additions or deductions. You can also customize objects to determine various discounts and prices, ensuring accurate pricing for all products.

**Where:** This change applies to Lightning Experience in Developer, Enterprise, and Unlimited editions where Revenue Lifecycle Management is enabled.

**When:** Revenue Lifecycle Management is available starting on February 13, 2024.

**How:** From Setup, in the Quick Find box, enter *Salesforce Pricing*, and then select **Salesforce Pricing Settings**. Turn on Salesforce Pricing.

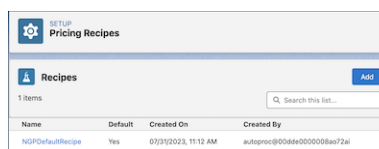
## Perform Complex Price Calculations Using a Recipe

Calculating a product's price when considering discounts and other factors by creating a pricing recipe. Associate data from selected objects with lookup tables that have the necessary variables to enforce pricing policies. You can then apply the pricing recipe to pricing procedures that calculate a product's price. Each org can only have one active recipe at a time.

**Where:** This change applies to Lightning Experience in Developer, Enterprise, and Unlimited editions where Revenue Lifecycle Management is enabled.

**When:** Revenue Lifecycle Management is available starting on February 13, 2024.

**How:** From Setup, in the Quick Find box, enter *Salesforce Pricing*, and then select **Pricing Recipes**.



Name	Default	Created On	Created By
NGPDefaultRecipe	Yes	07/03/2023, 11:12 AM	autoproc@00086a000008ao72ai

SEE ALSO:

[Salesforce Help: Pricing Recipes in Salesforce Pricing \(can be outdated or unavailable during release preview\)](#)

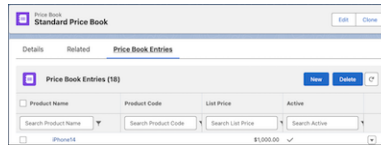
## Track Your Products by Using Price Books and Price Book Entries

Define pricing for your products by creating and organizing multiple price books using Salesforce Pricing. Use the predefined standard price book or create custom price books based on your business use case.

**Where:** This change applies to Lightning Experience in Developer, Enterprise, and Unlimited editions where Revenue Lifecycle Management is enabled.

**When:** Revenue Lifecycle Management is available starting on February 13, 2024.

**How:** From the app navigation menu of Price Management, search for and select **Price Books**. On a price book record, select the Price Book Entries tab and add a price book entry.



SEE ALSO:

[Salesforce Help: Create a New Pricing Recipe \(can be outdated or unavailable during release preview\)](#)

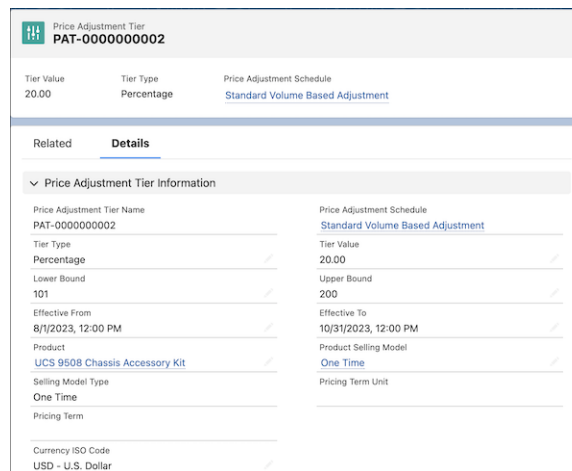
## Control Pricing with Adjustment Schedules

Create price adjustment schedules to apply discounts consistently to all your products based on quantity, a particular attribute, or when they're purchased in combination with other products. For example, you can adjust pricing based on the volume purchased within a selected date range. Offer bundle-based discounts by grouping different products to sell as a unit, such as purchasing a television with a service warranty.

**Where:** This change applies to Lightning Experience in Developer, Enterprise, and Unlimited editions where Revenue Lifecycle Management is enabled.

**When:** Revenue Lifecycle Management is available starting on February 13, 2024.

**How:** Create a Price Adjustment Schedule based on the volume purchased during the specified time range.



Create a Bundle Based Adjustment record to sell different products as a unit.

Create an Attribute Based Adjustment record to define attribute-based discounts for a product based on its attributes.

SEE ALSO:

[Salesforce Help: Create Price Adjustment Schedules](#) (can be outdated or unavailable during release preview)

[Salesforce Help: Attribute Based Adjustments](#) (can be outdated or unavailable during release preview)

[Salesforce Help: Create Price Adjustment Tiers for Volume Discounts](#) (can be outdated or unavailable during release preview)


[Salesforce Help: Bundle Based Adjustments](#) (can be outdated or unavailable during release preview)

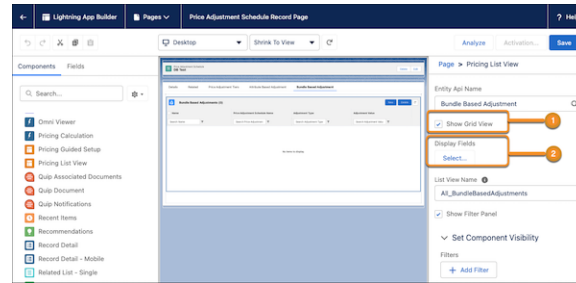
## View Your Pricing Data Your Way

View data in a list or grid and choose which fields to display on the price adjustment schedule and price adjustment record pages.

**Where:** This change applies to Lightning Experience in Developer, Enterprise, and Unlimited editions where Revenue Lifecycle Management is enabled.

**When:** Revenue Lifecycle Management is available starting on February 13, 2024.

**How:** To view data in a grid, open a price adjustment schedule or price adjustment method record page, and click . Select the Pricing List View component, and select **Show Grid View** (1). To add or remove fields, select **Display Fields** (2).



SEE ALSO:

[Salesforce Help: View Pricing Data \(can be outdated or unavailable during release preview\)](#)

## View Product Discounts on a Single Calendar

Quickly see the various discounts applied to a product running on a particular date or across a period on the Pricing Discount Calendar. Apply filters to zero in on particular pricing discounts. To get more information about the discount that was applied, click the corresponding record.

**Where:** This change applies to Lightning Experience in Developer, Enterprise, and Unlimited editions where Revenue Lifecycle Management is enabled.

**When:** Revenue Lifecycle Management is available starting on February 13, 2024.

**How:** On a product record, select the **Pricing Discount Calendar** tab.

Start Date	Period	Group By
Today	Nov 27, 2023	7 Days
	None	

Mon, Nov 27	Tue, Nov 28	Wed, Nov 29	Thu, Nov 30	Fri, Dec 01	Sat, Dec 02	Sun, Dec 03
12 AM	12 PM	12 AM	12 PM	12 AM	12 PM	12 AM

Record ID	Record Type	Value	Adjustment	Start Date	End Date
00000003	Standard Bundle Based Adjustment	100	Amount	2023-10-11T00:00:00Z	
PAT-000000041	Standard Price Adjustment Tar	200	AdjustmentPercentage	2023-11-07T00:00:00Z	
PAT-000000005	Standard Price Adjustment Tar	200	AdjustmentPercentage	2023-11-08T07:54:36:00Z	2024-11-07T07:54:36:00Z
PAT-000000006	Standard Price Adjustment Tar	200	AdjustmentPercentage	2023-11-08T07:54:40:00Z	2024-11-07T07:54:40:00Z
PAT-000000007	Standard Price Adjustment Tar	200	AdjustmentPercentage	2023-11-08T07:54:44:00Z	2024-11-07T07:54:44:00Z
PAT-000000011	Standard Price Adjustment Tar	200	AdjustmentPercentage	2023-11-08T07:55:02:00Z	2024-11-07T07:55:02:00Z
PAT-000000012	Standard Price Adjustment Tar	200	AdjustmentPercentage	2023-11-08T07:55:06:00Z	2024-11-07T07:55:06:00Z

SEE ALSO:

[Salesforce Help: Access the Pricing Discount Calendar \(can be outdated or unavailable during release preview\)](#)

## Build Context Definitions to Use Data Efficiently

Simplify data access during a pricing process by configuring context definitions. A context definition contains the information necessary to load the required data and execute a pricing procedure.

**Where:** This change applies to Lightning Experience in Developer, Enterprise, and Unlimited editions where Revenue Lifecycle Management is enabled.

**Who:** To create context definitions, users need a Context Service Access platform license and the Salesforce Pricing Admin or Salesforce Design Time User permission set license.



**How:** To use context definitions, you must first enable Context Service. From Setup, in the Quick Find box, enter *Context Service*, and then select **Context Service Settings**.



To view context definitions, from Setup, in the Quick Find box, enter *Context Definitions* to see the list of context definitions in your org.

Name	Developer Name	Created By	Created On	Status	Effective From	Effective To
SalesTransactionPromotion	SalesTransactionPromotion	Admin User	1/16/2023, 2:59 PM	Active	1/16/2023, 2:59 PM	2/7/2025
PromotionDiscountContext	PromotionDiscountContext	Admin User	10/23/2023, 10:07 AM	Active	10/23/2023, 10:07 AM	2/7/2025
Default	Default	Admin User	10/23/2023, 1:01 PM	Active	10/23/2023, 1:01 PM	2/7/2025

SEE ALSO:


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

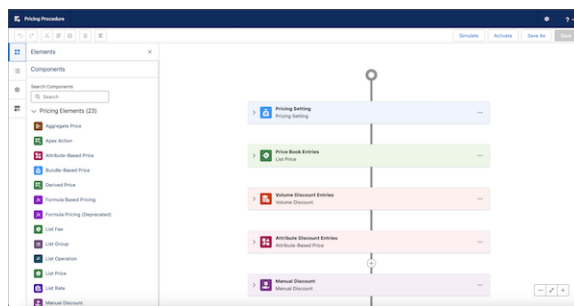
## Calculate Discounts Using Defined Pricing Elements

Convert your pricing policies into pricing procedures that do all the work of calculating discounts for you. In Pricing Procedure Builder, add pricing elements that call the appropriate lookup tables to calculate discounts and final net price for your products.

**Where:** This change applies to Lightning Experience in Developer, Enterprise, and Unlimited editions where Revenue Lifecycle Management is enabled.

**When:** Revenue Lifecycle Management is available starting on February 13, 2024.

**How:** In the Pricing Procedure Builder, click  and select a pricing element.



## Set a Product's Price on the Object Record Page

Quickly set the price of a product using the pricing action button on the Quote, Order, Contract, Sales Agreement, Case, Opportunity, and Work Order object pages. The pricing action associates a context definition with a pricing procedure to ensure that the pricing data processed during the price calculation is stored in the mapped Salesforce object. For other object pages, you can add the button using a Lightning component.

**Where:** This change applies to Lightning Experience in Developer, Enterprise, and Unlimited editions where Revenue Lifecycle Management is enabled.

**When:** Revenue Lifecycle Management is available starting on February 13, 2024.

SEE ALSO:

[Salesforce Help: Pricing Action Parameters in Salesforce Pricing \(can be outdated or unavailable during release preview\)](#)

## Make Better Pricing Decisions Using Price Waterfall

Get insights and reasons for every step of the pricing process by turning on the Price Waterfall view. For example, calculating the total cost of a product can require extra taxes. Or, you want to make sure that the discount that you're offering is correct. When viewing your pricing procedure using Price Waterfall, you see the price at every step, along with the reason for the addition or deduction. You can also customize the explanations for each pricing step.

**Where:** This change applies to Lightning Experience in Developer, Enterprise, and Unlimited editions where Revenue Lifecycle Management is enabled.

**When:** Revenue Lifecycle Management is available from February 13, 2024.

**How:** From Setup, in the Quick Find box, enter *Salesforce Pricing*, and then select **Salesforce Pricing Setup**. Turn on Price Waterfall.

When you simulate a pricing procedure, each step is explained.

Line Item	Units	Price
<b>Price Details</b>		
PriceBookEntry	PriceBookEntry	\$ 1000
VolumeDiscountEntry	VolumeDiscountEntry	\$ 1000
AttributeDiscountEntry	AttributeDiscountEntry	\$ 1000
ManualDiscount	\$100	\$ 900
ManualDiscount	-10%	\$ 810
<b>Net Amount</b>	Per unit price x 1 units	<b>\$ 810</b>

[View Pricing Process Logs with Price Waterfall Persistence \(Pilot\)](#)

To view stored pricing logs, use Price Waterfall Persistence.

## View Pricing Process Logs with Price Waterfall Persistence (Pilot)

To view stored pricing logs, use Price Waterfall Persistence.

**Where:** This change applies to Lightning Experience in Developer, Enterprise, and Unlimited editions where Revenue Lifecycle 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 Salesforce's sole discretion, and Salesforce may never make this feature generally available. Make your purchase decisions only on the basis of generally available products and features. This feature is made available on an AS IS basis and use of this feature is at your sole risk.

**When:** Revenue Lifecycle Management is available starting on February 13, 2024.

**How:** To view the process logs, from Setup, in the Quick Find box, enter *Salesforce Pricing*, and then select **Salesforce Pricing Setup**. Turn on Price Waterfall Persistence.

## Salesforce Pricing Flows

Guide users through the pricing process, and use the automation tools to gather pricing data and create related records.

### [Invoke Salesforce Pricing from Flows or Apex Code](#)

The API runs pricing for a context instance using the specified pricing procedure and, optionally, provides waterfall details. You can also call this invocable action using Apex code.

### [Invoke Salesforce Headless Pricing from Flows or Apex Code](#)

The API creates and builds the context instance necessary to run pricing using the specified pricing procedure. Optionally, it also provides waterfall details, context session data, and cached context data. You can also call the invocable action with the Apex code.

## Invoke Salesforce Pricing from Flows or Apex Code

The API runs pricing for a context instance using the specified pricing procedure and, optionally, provides waterfall details. You can also call this invocable action using Apex code.

**Where:** This change applies to Lightning Experience in Developer, Enterprise, and Unlimited editions where Revenue Lifecycle Management is enabled.

**When:** Revenue Lifecycle Management is available starting on February 13, 2024.

**Who:** Users need the Salesforce Pricing Runtime permission set to call pricing APIs from flows that are created in Flow Builder.

**How:** In Flow Builder, drag the **Action** element onto the canvas. Select the **Salesforce Pricing** category. Select the pricing API that you want to call, and then select the context instance ID and the pricing procedure necessary to run the pricing process.

SEE ALSO:

[Salesforce Help: Invoke Salesforce Pricing in a Flow \(can be outdated or unavailable during release preview\)](#)

## Invoke Salesforce Headless Pricing from Flows or Apex Code

The API creates and builds the context instance necessary to run pricing using the specified pricing procedure. Optionally, it also provides waterfall details, context session data, and cached context data. You can also call the invocable action with the Apex code.

**Where:** This change applies to Lightning Experience in Developer, Enterprise, and Unlimited editions where Revenue Lifecycle Management is enabled.

**When:** Revenue Lifecycle Management is available starting on February 13, 2024.

**Who:** Users need the Salesforce Pricing Runtime permission set to call pricing APIs from flows that are created in Flow Builder.

**How:** In Flow Builder, drag the **Action** element onto the canvas. Select the **Salesforce Headless Pricing** category. Select the pricing API that you want to call. Then select the context definition ID, context mapping ID, JSON data string, and the pricing procedure necessary to run the pricing process.

SEE ALSO:

[Salesforce Help: Invoke Salesforce Headless Pricing in a Flow \(can be outdated or unavailable during release preview\)](#)

## Manage Financial Decisions With Partner Communities

Empower your partner community users to effortlessly create and oversee pricing decisions, confirm the charges and discounts on their purchases, and conveniently access all their pricing-related data through partner communities.

**Where:** This change applies to Aura sites accessed through Lightning Experience in Developer, Enterprise, and Unlimited editions where Revenue Lifecycle Management is enabled.

**When:** Revenue Lifecycle Management is available starting on February 13, 2024.

**Who:** To use this feature, users must have the Revenue Lifecycle Management Add-On license. Partner community users need a Partner Community, Partner Community Login, Channel Account, or a Gold Partner license.

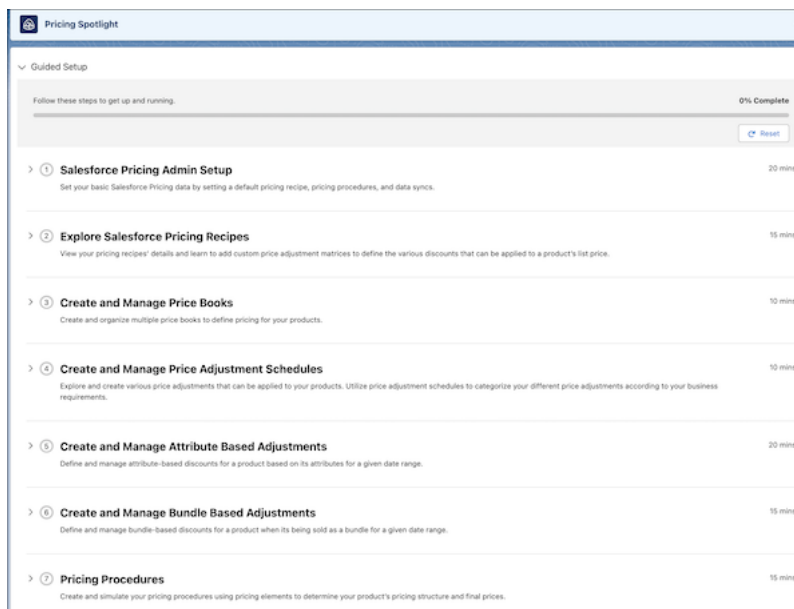
## Configure Salesforce Pricing with Ease Using Guided Setup

Get up and running quickly with the Pricing Guided Setup. You're walked through all the setup tasks needed to use Salesforce Pricing features.

**Where:** This change applies to Lightning Experience in Developer, Enterprise, and Unlimited editions where Revenue Lifecycle Management is enabled.

**When:** Revenue Lifecycle Management is available starting on February 13, 2024.

**How:** From the App Launcher, find and select **Price Management**. On the app's home page, go to the Guided Setup section.



## New Objects in Salesforce Pricing

Do more with these new Salesforce Pricing objects.

### Add pricing information for the products that your org sells

Use the new `PriceBook2` object.

### Associate your product in your price book with the list price

Use the new `PriceBookEntry` object.

### Define a method by which a product can be sold

Use the new `ProductSellingModel` object.

### Associate your product with a product selling model

Use the new `ProductSellingModelOption` object.

### Create price adjustment methods for a product

Use the new `PriceAdjustmentSchedule` object.

### Provide volume and tiered discounts for a product

Use the new `PriceAdjustmentTier` object.

**Provide attribute-based discounts for a product**

Use the new `AttributeBasedAdjustment` object.

**Create attribute definitions for a product**

Use the new `AttributeDefinition` object.

**Associate adjustment rules to group your price-impacting attributes**

Use the new `AttributeBasedAdjRule` object.

**Associate an adjustment condition and determine an attribute's value**

Use the new `AttributeAdjustmentCondition` object.

**Provide bundle discounts for a product**

Use the new `BundleBasedAdjustment` object.

**Associate a context definition and a pricing procedure to easily price a product**

Use the new `PricingActionParameters` object.

**New Connect REST API Resources**

Learn more about the resources available with Salesforce Pricing.

**Create a pricing waterfall log**

Make a POST request to the `/connect/core-pricing/waterfall` resource.

New request body: Pricing Waterfall Log Input

New response body: Pricing Generic Response

**Create and hydrate context instance**

Make a POST request to the `/connect/core-pricing/pricing` resource.

New request body: Pricing Input

New response body: Pricing Output

**Get pricing recipe list**

Make a GET request to the `/connect/core-pricing/recipe` resource.

New response body: Pricing Recipe Response

**Get the persisted pricing waterfall**

Make a GET request to the `/connect/core-pricing/waterfall/{lineItemId}/{executionId}` resource.

New response body: Line Item Waterfall Response

**Perform pricing request by using instance ID of a context**

Make a POST request to the `/connect/core-pricing/price-contexts/{contextid}` resource.

New request body: Pricing Request Input

New response body: Pricing Response

**Perform versioned revision for adjustment entities**

Make a POST request to the `/connect/core-pricing/versioned-revise-details` resource.

New request body: Pricing Versioned Revision Details Input

New response body: Pricing Versioned Revision Details

**Post recipes with lookup tables or procedures**

Make a POST request to the `/connect/core-pricing/recipe/mapping` resource.

New request body: Pricing Recipe Input

New response body: Pricing Recipe Post

### Sync pricing data

Make a GET request to the `/connect/core-pricing/sync/{pricingSyncOrigin}` resource.

New response body: Pricing Generic Response

SEE ALSO:

[Revenue Lifecycle Management Developer Guide: Pricing Business APIs \(can be outdated or unavailable during release preview\)](#)

## New Invocable Actions

Use the new invocable actions in Salesforce Pricing.

### Invoke the Pricing Connect API by providing the context, pricing, and price waterfall details

Use the new `runSalesforcePricing` action.

### Invoke the Pricing Connect API by providing the pricing data and details of a context, pricing procedure, and price waterfall

Use the new `runSalesforceHeadlessPricing` action.

SEE ALSO:

[Revenue Lifecycle Management Developer Guide: Run Salesforce Pricing Action](#)

[Revenue Lifecycle Management Developer Guide: Run Salesforce Headless Pricing Action](#)

## New Metadata Types

Learn more about the new metadata types in Salesforce Pricing.

## Salesforce Flow

### Invoke the Pricing Connect API by providing the context, pricing, and price waterfall details

Use the new `runSalesforcePricing` value in the existing `actionType` field, which is on the `FlowActionCall` subtype of the Flow metadata type.

### Invoke the Pricing Connect API by providing the pricing data and details of a context, pricing procedure, and price waterfall

Use the new `runSalesforceHeadlessPricing` value in the existing `actionType` field, which is on the `FlowActionCall` subtype of the Flow metadata type.

SEE ALSO:

[Revenue Lifecycle Management Developer Guide: Flow for Salesforce Pricing](#)

## Product Configurator (Generally Available)

Configure products that meet your business requirements. Product Configurator provides an optimized and intuitive user interface to select the right options for simple and complex products. You can view product-related information such as options, attributes, pricing, and purchasing options in a customizable layout. Sales reps can use this layout to effortlessly configure products.

### [Configure Your Products More Easily](#)

Use Product Configurator, which is now generally available, to present complex product offerings to customers efficiently. Your sales reps can validate product selections instantly and get immediate cost insights with real-time pricing updates.

### [New Connect REST API Resource](#)

Get to know the new resource available with Product Configurator.

## Configure Your Products More Easily

Use Product Configurator, which is now generally available, to present complex product offerings to customers efficiently. Your sales reps can validate product selections instantly and get immediate cost insights with real-time pricing updates.

**Where:** This change applies to Lightning Experience in Developer, Enterprise, and Unlimited editions for Industries clouds where Revenue Lifecycle Management and Product Configurator are enabled.

**When:** Revenue Lifecycle Management is available starting on February 13, 2024.

**Why:** After you enable Product Configurator, you can:

- Customize the product configurator flow: Show product-related information, such as option groups, attributes, and product bundles in a customizable layout that suits the business needs.
- Preview runtime experience: Assign multiple products or product classes to a product configurator flow, and preview the user experience in real-time.
- Customize configuration rules: Manage the attribute structure in the product bundle with cardinality check, product selection validations, and messages.
- Build complex product bundles with ease: Product Configurator's intuitive interface and headless APIs support multi-level product bundle structures. Users can effortlessly configure quantities, attributes, and options while receiving real-time pricing updates.

SEE ALSO:

[Salesforce Help: Product Configurator](#)

## New Connect REST API Resource

Get to know the new resource available with Product Configurator.

### Retrieve and update a product's configuration

Make a POST request to the `/connect/cpq/configurator/actions/configure` resource.

New request body: Configurator Input

New response body: Configuration Details

## Quote and Order Capture (Generally Available)

Create quotes and capture orders with the right products and the right prices in any channel. Whether it's an initial, amendment, or renewal sale, Quote and Order Capture aligns your products and prices for a seamless sales experience. Quote and Order Capture supports the complexity of subscription lifecycles, ensuring end-to-end integrity from quotes and orders to contracts, assets, amendments, and renewals. By delivering omnichannel experiences, meet your buyers and sellers in any channel with cross-sales experiences with other Salesforce products such as Partner Relationship Management and Commerce Cloud.

### [Product Discovery](#)

Sales reps can browse catalogs, categories, and products in a simple, structured way to identify the most suitable products for their customers. They can also view all product information such as attributes, pricing, and buying options in a single comprehensive view. This comprehensive view enables sales reps to effortlessly identify additional selling opportunities and to help customers make quick, informed decisions. Admins can configure a custom pricing procedure that calculates product pricing and a qualification procedure that evaluates product eligibility.

### [Capture Quotes and Orders](#)

Win deals with the right products and prices. With Quote and Order Capture, close deals faster with a large-scale, extensible quoting experience. Also, create orders from quotes or create them directly from accounts.

### [Configure Products To Accurately Price Quotes and Orders](#)

Customize products for your customers by configuring the right options and attributes with support for Salesforce Product Configurator. With a configurator, your sales reps can customize products to meet the needs of your customers.

### [Increase Revenues With Partner Communities](#)

Provide your partners with the Revenue Lifecycle Management Omni-Channel selling capabilities through a partner community. Empower your partner community users to easily request additional discounts and price adjustments by using approval processes.

### [New and Changed Objects in Salesforce Quote and Order Capture](#)

Access more data through these new objects and fields.

### [New Connect REST API Resources in Quote and Order Capture](#)

Learn more about the new resources available with Quote and Order Capture.

### [New Metadata Types in Quote and Order Capture](#)

Learn more about the new metadata types in Quote and Order Capture.

### [New Invocable Actions in Quote and Order Capture](#)

Use the new invocable actions in Quote and Order Capture.

### [CommerceOrders Namespace](#)

The CommerceOrders namespace is used to place orders with integrated pricing, configuration, and validation. It has these new classes, methods, and enums.

### [PlaceQuote Namespace](#)

The PlaceQuote namespace is used to create or update quotes with pricing preferences and configuration options. It has these new classes, methods, and enums.

## Product Discovery

Sales reps can browse catalogs, categories, and products in a simple, structured way to identify the most suitable products for their customers. They can also view all product information such as attributes, pricing, and buying options in a single comprehensive view. This comprehensive view enables sales reps to effortlessly identify additional selling opportunities and to help customers make quick, informed decisions. Admins can configure a custom pricing procedure that calculates product pricing and a qualification procedure that evaluates product eligibility.

### [Discover Suitable Products](#)

Sales reps can browse and select catalogs, navigate the category hierarchy, and view the list of products in a category. They can search by product name, filter based on product qualification, and sort the product list to find suitable products.

### [Help Make Buying Decisions and Identify Additional Selling Opportunities](#)

Sales reps can use the comprehensive view to see product details, bundle attributes, product attributes, buying options, and pricing information and help customers make quick, informed decisions. They can also use the bundle attributes and product attributes to identify cross-selling and upselling opportunities.

### [Select Custom Qualification and Pricing Procedures](#)

Ensure efficient access to additional business data by using a custom context definition. Apply your business-specific qualification and pricing policies by using custom qualification and pricing procedures.



## Discover Suitable Products

Sales reps can browse and select catalogs, navigate the category hierarchy, and view the list of products in a category. They can search by product name, filter based on product qualification, and sort the product list to find suitable products.

**Where:** This change applies to Lightning Experience in Developer, Enterprise, and Unlimited editions where Revenue Lifecycle Management is enabled.

**When:** Revenue Lifecycle Management is available starting on February 13, 2024.

**Who:** This feature is available to users with the Use Product Discovery user permission.

**How:** Click **Browse Catalogs** on the order and quote pages or click **View Catalogs** on the account pages. Select a catalog, and then click **Next** to open the Browse Products page. Filter, search, and sort products to find the products.

## Help Make Buying Decisions and Identify Additional Selling Opportunities

Sales reps can use the comprehensive view to see product details, bundle attributes, product attributes, buying options, and pricing information and help customers make quick, informed decisions. They can also use the bundle attributes and product attributes to identify cross-selling and upselling opportunities.

**Where:** This change applies to Lightning Experience in Developer, Enterprise, and Unlimited editions where Revenue Lifecycle Management is enabled.

**When:** Revenue Lifecycle Management is available starting on February 13, 2024.

**Who:** This feature is available to users with the Use Product Discovery user permission.

**How:** Open a product record, and then view the product, product bundle, and product attribute details.

## Select Custom Qualification and Pricing Procedures

Ensure efficient access to additional business data by using a custom context definition. Apply your business-specific qualification and pricing policies by using custom qualification and pricing procedures.

**Where:** This change applies to Lightning Experience in Developer, Enterprise, and Unlimited editions where Revenue Lifecycle Management is enabled.

**When:** Revenue Lifecycle Management is available starting on February 13, 2024.

**Who:** This feature is available to admins with the Customize Application system permission.

**How:** From Setup, in the Quick Find box, enter *Product Discovery*, and select **Product Discovery Settings**. Select the custom context definition, qualification procedure, and pricing procedure.

## Capture Quotes and Orders

Win deals with the right products and prices. With Quote and Order Capture, close deals faster with a large-scale, extensible quoting experience. Also, create orders from quotes or create them directly from accounts.

**Where:** This change applies to Lightning Experience in Developer, Enterprise, and Unlimited editions for Industries clouds where Revenue Lifecycle Management is enabled.

**When:** Revenue Lifecycle Management is available starting on February 13, 2024.

### Why:

With Quote and Order Capture, you can:

- Easily manage complex quotes: Browse and modify your quotes in the new Transaction Line Editor by using the options to filter, search, and sort line items.

- Instantly price your transaction: Recalculate the price of your transaction after every edit on a line item by using the instant pricing feature (optional).
- View pricing information: Get a breakdown of the pricing of your quote or order by using the price waterfall feature.

**How:** From Setup, in the Quick Find box, enter *Revenue Settings*, and then select **Revenue Settings**. Turn on Access Revenue Lifecycle Management Features.

## Configure Products To Accurately Price Quotes and Orders

Customize products for your customers by configuring the right options and attributes with support for Salesforce Product Configurator. With a configurator, your sales reps can customize products to meet the needs of your customers.

**Where:** This change applies to Lightning Experience in Developer, Enterprise, and Unlimited editions for Industries clouds where Revenue Lifecycle Management is enabled.

**When:** Revenue Lifecycle Management is available starting on February 13, 2024.

### Why:

Use these features of Quote and Order Capture to enhance the experience of your sales reps:

- Run-time product and asset configuration: Configure products that meet your customer's requirements with an easy-to-use point-and-click interface.
- Real-time pricing: Update prices based on the attributes and quantity that your sales reps configure. With real-time pricing, your sales reps can make better sales and enables your customers to make more informed buying decisions.
- Third-party configurator support: Integrate your existing configurator into Revenue Lifecycle Management.

**How:** From Setup, in the Quick Find box, enter *Revenue Settings*, and then select **Revenue Settings**. Turn on Product Configurator.

## Increase Revenues With Partner Communities

Provide your partners with the Revenue Lifecycle Management Omni-Channel selling capabilities through a partner community. Empower your partner community users to easily request additional discounts and price adjustments by using approval processes.

**Where:** This change applies to Aura sites accessed through Lightning Experience in Developer, Enterprise, and Unlimited editions where Revenue Lifecycle Management is enabled.

**When:** Revenue Lifecycle Management is available starting on February 13, 2024.

**Who:** To use this feature, users must have the Revenue Lifecycle Management Add-On license. Partner community users need a Partner Community, Partner Community Login, Channel Account, or a Gold Partner license.

## New and Changed Objects in Salesforce Quote and Order Capture

Access more data through these new objects and fields.

### Specify the order action type for Revenue Lifecycle Management

Use the `Add`, `Amend`, `Renew`, and `Cancel` values for Type in the OrderAction object.

### Specify the quote action type for Revenue Lifecycle Management

Use the `Add`, `Amend`, `Cancel`, `No Change`, and `Renew` values for Type in the new QuoteAction object.

### Capture the quantity and price information of an order product

Use the OrderItemDetail object.

### Capture the quantity and price information of a quote line item

Use the QuoteLineDetail object.

**Specify the status and the template used to create a document**

Use the `Status` and `DocumentTemplate` fields of the `QuoteDocument` object.

**Specify if an order item is valid and can be transitioned into an asset**

Use the `ValidationState` field of the `OrderItem` object.

**Specify if a quote line item is valid and can be transitioned into an order**

Use the `ValidationState` field of the `QuoteLineItem` object.

**Specify the total amount for line items and the discount percentage applied to an order**

Use the `TotalRoundedLineAmount` and `DiscountPercent` fields of the `Order` object.

**Share order and order item records with external users**

Use the `ExternalReference` and `ExternalReferenceItem` fields of the `BillingSchedule` object.

**Capture the full name of the order recipient**

Use the `DeliverToFullName` field of the `OrderDeliveryGroup` object.

**Specify the relationship between the products in an order item relationship**

Use the `ProductRelatedComponent` field of the `OrderItemRelationship` object.

**Capture the attributes of an order item**

Use the `OrderItemAttribute` object.

**Capture the percentage of discount given to the partner for a quote line**

Use the `PartnerDiscountPercent` field of the `QuoteLineItem` object.

**Capture the unit price of a quote line for the partner**

Use the `PartnerUnitPrice` field of the `QuoteLineItem` object.

**Capture the start and end quantities of amend quotes**

Use the `StartQuantity` and `EndQuantity` fields of the `QuoteLineItem` object.

**Capture the start and end quantities of amend orders**

Use the `StartQuantity` and `EndQuantity` fields of the `OrderItem` object.

**New Connect REST API Resources in Quote and Order Capture**

Learn more about the new resources available with Quote and Order Capture.

**Create a quote to discover and price products and services**

Make a POST request to the new `/commerce/quotes/actions/place` resource.

New request body: Place Quote Input

New response body: Place Quote

**Get a paginated list of catalogs**

Make a POST request to the new `/connect/cpq/catalogs` resource.

New request body: Catalog List Input

New response body: CPQ Base List

**Get a list of categories and subcategories of a specified catalog**

Make a POST request to the new `/connect/cpq/categories` resource.

New request body: Category List Input

New response body: CPQ Base List

**Get a list of offers based on a search query**

Make a POST request to the new `/connect/cpq/products/search` resource.

New request body: Products Search Input

New response body: CPQ Base List

#### **Get a list of products for a specified catalog, category, or subcategory**

Make a POST request to the new `/connect/cpq/products` resource.

New request body: Product List Input

New response body: CPQ Base List

#### **Get catalog details for a specified catalog ID**

Make a POST request to the new `/connect/cpq/catalogs/{catalogId}` resource.

New request body: Catalog Details Input

New response body: CPQ Base Details

#### **Get details of a category for a specified category ID**

Make a POST request to the new `/connect/cpq/categories/{categoryId}` resource.

New request body: Category Details Input

New response body: CPQ Base Details

#### **Get instant pricing data on a quote or an order line data grid**

Make a POST request to the new `/industries/cpq/quotes/actions/get-instant-price` resource.

New request body: Instant Pricing Input

New response body: Instant Pricing

#### **Get product details for a specified product ID**

Make a POST request to the new `/connect/cpq/products/{productId}` resource.

New request body: Product Details Input

New response body: CPQ Base Details

#### **Place an order along with its product and tax lines**

Make a POST request to the new `/commerce/sales-orders/actions/place` resource.

New request body: Place Order Input

New response body: Place Order Response

#### **Run qualification procedure on a list of product IDs**

Make a POST request to the new `/connect/cpq/qualification` resource.

New request body: QOC Qualification Input

New response body: CPQ Base List

## **New Metadata Types in Quote and Order Capture**

Learn more about the new metadata types in Quote and Order Capture.

### **Salesforce Flow**

#### **Create an order from a quote record**

Use the new `createOrderFromQuote` value in the existing `actionType` field, which is on the `FlowActionCall` subtype of the `Flow` metadata type.

## New Invocable Actions in Quote and Order Capture

Use the new invocable actions in Quote and Order Capture.

### **Create an order from a quote record**

Use the new `createOrderFromQuote` action.

## CommerceOrders Namespace

The `CommerceOrders` namespace is used to place orders with integrated pricing, configuration, and validation. It has these new classes, methods, and enums.

### New Classes

#### **Set the input configuration options of the product configurator**

Use the `ConfigurationOptionsInput` properties.

#### **Set the sObject graph values of the order payload to be ingested**

Use the `GraphRequest` constructor.

#### **Use the Apex entry point to execute the Place Order API request**

Use the `PlaceOrderExecutor` class methods.

#### **Get the Place Order API response**

Use the `PlaceOrderResult` class properties.

#### **Assign values to the fields of an order item**

Use the `RecordResource` constructor.

#### **Associate a record object with a reference identifier**

Use the `RecordWithReferenceRequest` constructor.

### New Enums

#### **Define the product configuration input for the Place Order API request**

Use the new `ConfigurationInputEnum` enum in the `ConfigurationOptionsInput` class method.

#### **Define the pricing preference during the create order process**

Use the new `PricingPreferenceEnum` enum in the `PlaceOrderExecutor` class method.

## PlaceQuote Namespace

The `PlaceQuote` namespace is used to create or update quotes with pricing preferences and configuration options. It has these new classes, methods, and enums.

### New Classes

#### **Set the input configuration options of the product configurator**

Use the `ConfigurationOptionsInput` properties.

#### **Set the sObject graph values of the quote payload to be ingested**

Use the `GraphRequest` constructor.

#### **Use the Apex entry point to execute the Place Quote API request**

Use the `PlaceQuoteExecutor` and `PlaceQuoteRLMApexProcessor` class methods.

**Get the exception details of the Place Quote API request**

Use the `PlaceQuoteException` class methods.

**Get the Place Quote API response**

Use the `PlaceQuoteResponse` class properties.

**Assign values to the fields of a quote**

Use the `RecordResource` constructor.

**Associate a record object with a reference identifier**

Use the `RecordWithReferenceRequest` constructor.

**New Enums****Define the product configuration input for the Place Quote API request**

Use the new `ConfigurationInputEnum` enum in the `ConfigurationOptionsInput` class method.

**Define the pricing preference during the create quote process**

Use the new `PricingPreferenceEnum` enum in the `PlaceQuoteExecutor` and `PlaceQuoteRLMApexProcessor` class method.

## Asset Lifecycle (Generally Available)

Provide sales reps with insights into customer assets and help your company increase customer lifetime value by using Revenue Lifecycle Management. Add the improved Asset Viewer component to account record pages, so sales reps can see a consolidated list of all assets that belong to an account. Add the Asset State Period Chart and Asset Summary components to partner communities, so your company's partners can quickly see key information about customer assets. Manage asset lifecycles using amendments, renewals, or cancellations to meet your customers' business needs.

### [See the Customer Assets That Need Your Attention](#)

View all products that a customer purchased by looking at the Asset Viewer on the account record page. Sales reps can now search for assets by name in the Asset Viewer, so it's easier to find information about customer assets. Sales reps can also filter assets, so that the Asset Viewer displays only assets that meet the filter criteria. Sales reps can sort assets by ascending and descending values, so it's easier to see which assets might require a sales rep's attention.

### [Visualize Customer Assets in Partner Communities](#)

Give your partner community users more insight into the assets that a customer purchased. The Asset State Period Chart and Asset Summary components, which display the quantity and monthly recurring revenue of assets, are now available in Experience Builder so you can add them to your partner communities.

### [Amend, Renew, or Cancel Assets](#)

Help your sales reps support your existing customers by making it easy to update customer assets when your customers want to make changes. Set up a flow that calls an invocable action so that sales reps can quickly amend, renew, or cancel assets at the click of a button. When assets are updated, the flow can generate a quote or an order that reflects the changes.

### [Create a Contract from a Quote or Order](#)

Save your sales reps' time by enabling the automatic creation of contracts when they update a quote or an order. Configure a custom flow configuration that automates the contract creation process in your org.

### [Automatically Create an Asset Contract Relation Using Asset Creation Flows](#)

Save sales reps' time by automating the process for creating assets. Use either the Order to Asset API or the Order Product to Asset API to create the Asset Contract Relationship. View the assets under a contract on a new tab called Assets. You can also initiate an amend, renew, or cancel action against the assets from the contract, which takes you to a quote or an order where you can make the changes.

### [New Invocable Actions in Asset Lifecycle](#)

Use the new invocable actions in Asset Lifecycle.

### [New Metadata Types in Asset Lifecycle](#)

Learn more about the new metadata types in Asset Lifecycle.

## See the Customer Assets That Need Your Attention

View all products that a customer purchased by looking at the Asset Viewer on the account record page. Sales reps can now search for assets by name in the Asset Viewer, so it's easier to find information about customer assets. Sales reps can also filter assets, so that the Asset Viewer displays only assets that meet the filter criteria. Sales reps can sort assets by ascending and descending values, so it's easier to see which assets might require a sales rep's attention.

**Where:** This change applies to Sales Cloud and Service Cloud in Lightning Experience in Enterprise, Unlimited, and Developer editions with a Revenue Lifecycle Management license. This change also applies to Aura, LWR, and Visualforce sites accessed through Lightning Experience in the same editions.

**When:** Revenue Lifecycle Management is available starting on February 13, 2024.

**Who:** Users with the Customize Application permission can add the Asset Viewer component to the accounts record page and can configure which columns are shown in the Asset Viewer. Users with Read access to Account record pages can use the search, sort, and filtering features in the Asset Viewer.

**How:** Make sure that the Assets related list is on the Account record page. In Lightning App Builder, drag the Transaction Line Editor to the Account record page, select the columns that you want to display, and save your changes. The Managed Asset viewer appears on the page.

After the Asset Viewer is added to the Account record page, users can search, sort, and filter the assets.

## Visualize Customer Assets in Partner Communities

Give your partner community users more insight into the assets that a customer purchased. The Asset State Period Chart and Asset Summary components, which display the quantity and monthly recurring revenue of assets, are now available in Experience Builder so you can add them to your partner communities.

**Where:** This change applies to Sales Cloud and Service Cloud in Lightning Experience in Enterprise, Unlimited, and Developer editions with a Revenue Lifecycle Management license and an Experience Cloud license. This change also applies to Aura, LWR, and Visualforce sites accessed through Lightning Experience in the same editions.

**When:** Revenue Lifecycle Management is available starting on February 13, 2024.

**Who:** Users who can customize partner communities can access the components in the Experience Builder.

**Why:** The Asset Summary component summarizes an asset's quantity and monthly recurring revenue as a numeric value, so your users can quickly see the asset's value.

The Asset State Period Chart component shows an asset's quantity and monthly recurring revenue over time, so your users can visualize how the asset's quantity and monthly recurring revenue changes over a time period.

**How:** In Experience Builder, open the Account object page. Drag the Asset Summary component and Asset State Period Chart component to the page and configure the fields that you want to display.

## Amend, Renew, or Cancel Assets

Help your sales reps support your existing customers by making it easy to update customer assets when your customers want to make changes. Set up a flow that calls an invocable action so that sales reps can quickly amend, renew, or cancel assets at the click of a button. When assets are updated, the flow can generate a quote or an order that reflects the changes.

**Where:** This change applies to Lightning Experience in Enterprise, Developer, and Unlimited editions where Revenue Lifecycle Management is enabled.

**When:** Revenue Lifecycle Management is available starting on February 13, 2024.

**Who:** All users with the InitiateAmendment API, InitiateCancellation API, or InitiateRenewal API user permission set can use this feature. Other permissions needed include Assetize Order, CalculatePrices API, CalculateTaxes API, Context Service Runtime, Create Orders from Quotes, CreateContract API, PlaceOrder API, Price and Tax Calculation for Quoting.

**Why:** Support your customers when they want to amend, renew, or cancel the products that they purchased. Generate records, such as quotes and orders, to support these changes. To create amendment, renewal, and cancellation quotes and orders, use the Amend, Renew, Cancel flow in Revenue Lifecycle Management. The flow also updates the assets associated with the amendment, renewal, or cancellation.

**How:** Implement a flow configuration to automatically create a quote or an order based on your chosen assets and selected action of amendment, renewal, or cancellation. Three new invocable actions take a set of asset IDs and create an amendment, renewal, or cancellation quote or order. These invocable actions can be called from the Account and Contract records by using the Amend, Renew, and Cancel Assets guided flow. Admin setup is required to enable the flows for Partner Community and Community users.

## Create a Contract from a Quote or Order

Save your sales reps' time by enabling the automatic creation of contracts when they update a quote or an order. Configure a custom flow configuration that automates the contract creation process in your org.

**Where:** This change applies to Lightning Experience in Enterprise, Developer, and Unlimited editions where Revenue Lifecycle Management is enabled.

**When:** Revenue Lifecycle Management is available starting on February 13, 2024.

**Who:** All users with the CreateContract API user permission set.

**How:** In Revenue Lifecycle Management, the CreateContract API uses the context service to map fields from a source transaction ID such as a quote or an order to create a contract. Use the new invocable action with a Salesforce flow or add the New Contract standard button to your quote or order page layout.

## Automatically Create an Asset Contract Relation Using Asset Creation Flows

Save sales reps' time by automating the process for creating assets. Use either the Order to Asset API or the Order Product to Asset API to create the Asset Contract Relationship. View the assets under a contract on a new tab called Assets. You can also initiate an amend, renew, or cancel action against the assets from the contract, which takes you to a quote or an order where you can make the changes.

**Where:** This change applies to Lightning Experience in Enterprise, Developer, and Unlimited editions where Revenue Lifecycle Management is enabled.

**When:** Revenue Lifecycle Management is available starting on February 13, 2024.

**Who:** All users with the Assetize Order permission set.

**How:** In Setup, search for *Flows* to create and activate a new custom flow by using either the Order to Asset API or the Order Product to Asset API. Orders must be associated with a parent contract with a Revenue Lifecycle Management Application Usage Assignment when these APIs are invoked. Every asset created from the order is linked to the contract associated with the order by creating an Asset Contract Relationship.



## New Invocable Actions in Asset Lifecycle

Use the new invocable actions in Asset Lifecycle.

### Create or update an asset from an order

Use the new `createOrUpdateAssetFromOrder` action.

### Create or update an asset from an order item

Use the new `createOrUpdateAssetFromOrderItem` action.

### Initiate the amendment of an asset

Use the new `initiateAmendment` action.

### Initiate the cancellation of an asset

Use the new `initiateCancellation` action.

### Initiate the renewal of an asset

Use the new `initiateRenewal` action.

## New Metadata Types in Asset Lifecycle

Learn more about the new metadata types in Asset Lifecycle.

## Salesforce Flow

### Create or update an asset from an order

Use the new `createOrUpdateAssetFromOrder` value in the existing `actionType` field, which is on the `FlowActionCall` subtype of the Flow metadata type.

### Create or update an asset from an order item

Use the new `createOrUpdateAssetFromOrderItem` value in the existing `actionType` field, which is on the `FlowActionCall` subtype of the Flow metadata type.

### Initiate the amendment of an asset

Use the new `initiateAmendment` value in the existing `actionType` field, which is on the `FlowActionCall` subtype of the Flow metadata type.

### Initiate the cancellation of an asset

Use the new `initiateCancellation` value in the existing `actionType` field, which is on the `FlowActionCall` subtype of the Flow metadata type.

### Initiate the renewal of an asset

Use the new `initiateRenewal` value in the existing `actionType` field, which is on the `FlowActionCall` subtype of the Flow metadata type.

## Salesforce CPQ

Salesforce CPQ offers enhanced security with a dedicated integration user with a short-lived access token.

### [Generate Permissions for the Integration User](#)

In Winter '23, an integration user was added to Salesforce CPQ to improve security. This integration user uses a short-lived access token to access the external calculation service. The short-lived access token provides better security compared to the previous method, which used a long-life refresh token that's no longer stored by Salesforce. With this release, after you install the Salesforce CPQ package for the first time, generate the required permission sets and permission set groups to use the integration user.

## Generate Permissions for the Integration User

In Winter '23, an integration user was added to Salesforce CPQ to improve security. This integration user uses a short-lived access token to access the external calculation service. The short-lived access token provides better security compared to the previous method, which used a long-life refresh token that's no longer stored by Salesforce. With this release, after you install the Salesforce CPQ package for the first time, generate the required permission sets and permission set groups to use the integration user.

**Where:** This change applies to Lightning Experience and Salesforce Classic with Salesforce CPQ.

**How:** In Setup, find and open Installed Packages. Next to the Salesforce CPQ package, click **Configure**. On the Pricing and Calculation tab, turn on Use Integration User for Calculations, and click **Generate Integration Permissions**.

**See Also:** [Improve Security by Enabling Integration User for Calculations](#)

## Subscription Management

Streamline your recurring revenue operations with improvements to the Generate Invoice API in Subscription Management. Ensure that OrderToAsset event subscribers continue to receive event notifications by updating their user permissions.

### [Enhanced Error Handling for Billing Schedules](#)

When you call the `commerce/invoicing/invoices/collection/actions/generate` API, if the billing schedule is in the error status, Subscription Management now ensures that the Next Billing Date and Next Charge From Date aren't updated. Subscription Management now only updates them when the Billing Schedule status is updated to Ready for Invoicing.

### [Ensure Valid States When Using Single Invoice Generation API](#)

When you use the `/commerce/invoicing/invoices/collection/actions/generate` API, Subscription Management now ensures that billing period items are created before an invoice is posted. This ensures that there aren't missing billing period items and that there are always billing period items when invoices are posted. If the billing period item update fails after the invoice is posted, then the billing schedule is set to Error.

### [Ensure Users Can Access OrderToAsset and OrderItemToAsset Platform Events](#)

Users who subscribe to the CreateAssetOrderEvent platform event in Subscription Management must update their user permissions to continue to access CreateAssetOrderEvent and CreateAssetOrderDtlEvent objects. If user permissions aren't updated, users can't receive or view event notifications.

## Enhanced Error Handling for Billing Schedules

When you call the `commerce/invoicing/invoices/collection/actions/generate` API, if the billing schedule is in the error status, Subscription Management now ensures that the Next Billing Date and Next Charge From Date aren't updated. Subscription Management now only updates them when the Billing Schedule status is updated to Ready for Invoicing.

**Where:** This change applies to 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.

## Ensure Valid States When Using Single Invoice Generation API

When you use the `/commerce/invoicing/invoices/collection/actions/generate` API, Subscription Management now ensures that billing period items are created before an invoice is posted. This ensures that there aren't missing billing period items and that there are always billing period items when invoices are posted. If the billing period item update fails after the invoice is posted, then the billing schedule is set to Error.

**Where:** This change applies to 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.

**Why:** When using the `/commerce/invoicing/invoices/collection/actions/generate` API, invoices were sometimes posted without billing period items and with the billing schedule set to ReadyForInvoicing. This issue occurred due to a failure when creating billing period items.

## Ensure Users Can Access OrderToAsset and OrderItemToAsset Platform Events

Users who subscribe to the CreateAssetOrderEvent platform event in Subscription Management must update their user permissions to continue to access CreateAssetOrderEvent and CreateAssetOrderDtIEvent objects. If user permissions aren't updated, users can't receive or view event notifications.

**Where:** This change applies to Sales Cloud and Service Cloud in Lightning Experience in Enterprise, Unlimited, and Developer editions with a Subscription Management license.

**Why:** The CreateAssetOrderEvent and CreateAssetOrderDtIEvent objects send event notifications when the OrderToAsset API is called. By default, the CreateAssetOrderEvent and CreateAssetOrderDtIEvent objects aren't assigned to a permission set. Admins must create a permission and assign the user permissions so that users can subscribe to their events.

Users can continue to call the OrderToAsset and OrderItemToAsset APIs without these permissions, but they won't receive event notifications.

**How:** In Setup, go to Permission Sets. Create a permission set for the OrderToAsset and OrderItemToAsset events. In the Apps section, select **Object Settings**. Select **CreateAssetOrderEvent**, click **Edit**, select **Read**, and save your changes. Repeat the steps to assign Read access for **CreateAssetOrderDtIEvent**.

SEE ALSO:

[Platform Events: CreateAssetOrderEvent](#)

[Platform Events: CreateAssetOrderDtIEvent](#)

## Sales

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Boost your sales teams' results with new Einstein features, detailed metrics, and simplified setup experiences. Einstein for Sales users can harness the power of generative AI to draft sales emails, answer questions about sales calls, and find similar past won deals. Your sales teams can use Seller Home to see an overview of metrics, goals, suggestions, and activities. Sales reps can use Salesforce Maps Lite to plan in-person and virtual visits in key geographic areas. Revenue Insights has a simplified setup experience, and sales reps can use Stage Conversion analysis to dive into their pipeline details. Pipeline Inspection has a more responsive UI. And in Partner Relationship Management, your channel managers can use the Channel Management Console as a command center for your teams' indirect sales.

### [Sales Cloud Einstein](#)

Let Einstein generative AI draft sales emails from a sales rep's inbox and include related information. Connect to Google using a Google Workspace Marketplace app and troubleshoot Einstein Activity Capture with more metrics and ways to resolve users' issues. Learn insights from previously won deals with the Find Similar Opportunities action in Einstein Copilot.

### [Einstein Conversation Insights](#)

Ask anything about your sales calls with Call Explorer! Using generative AI, Call Explorer answers questions related to a call about competitor mentions, coaching opportunities, and more directly from voice and video call records. Another Einstein feature, Call Summaries, is supported in more languages. We expanded our compatible video providers to include Microsoft Teams and Google Meet, and have full support for a few voice providers. You can quickly see license and account usage from the new Status and Usage page. And we expanded the ability for reps to assign the participants on a call.

### [Sales Fundamentals](#)

See a detailed overview of metrics, goals, suggestions, tasks, and activities in Seller Home. Plan for meetings with customers and prospects based on geographic locations directly on a map using Salesforce Maps Lite. See account activity, scan opportunity metrics, review cases, and log activities, all in one place in the Account Intelligence view. See which leads and contacts are engaging and view insights on the Lead and Contact Intelligence Views.

### [Sales Engagement](#)

Build responsive cadences in less time with less complexity with Cadence Builder 2.0 and create call scripts and email templates while adding a quick cadence.

### [Revenue Intelligence](#)

Try the updated Revenue Insights setup for a more intuitive experience, a simplified workflow, and more robust error messages. You can now go to one place to manage your apps and all the tasks associated with your apps. Dive into the details of your pipeline using Stage Conversion analysis.

### [Pipeline Inspection](#)

Enjoy a more responsive Pipeline Inspection UI. Add filter logic to create more targeted lists of deals. The record limit is increased to 2,000 for all metrics, views, and charts in Pipeline Inspection.

### [Collaborative Forecasts](#)

Group forecasts into segments that make sense for your business. Easily evaluate adjusted forecasts with adjustment values in separate columns on the forecasts page. Quickly access different forecast views using tabs. And gain more insight into forecasts with forecast chart enhancements and added custom report types.

### [Enablement and Guidance](#)

Deliver enablement programs focused on improving revenue outcomes, driving business growth, and growing a community of engaged and inspired users. Bring curated resources related to your products, services, and processes to users where they work. Elevate business-critical job performance, develop in-demand skills, and provide timely, contextual onboarding, training, and coaching.

### [Partner Relationship Management](#)

Help your channel business thrive with Partner Relationship Management (PRM). Channel managers work with confidence from the Channel Management Console, a dedicated app that acts as a command center for your indirect sales. Build loyal partners with streamlined onboarding and training using Partner Enablement and In-App Guidance. Plus, partners can get deeper insight into their contacts, leads, and opportunities with access to Contact Intelligence View, Lead Intelligence View, and more Pipeline Inspection features.

### [Sales Performance Management](#)

Plan your sales with participation and accountability from stakeholders for their areas of responsibility. Optimize boundary assignments using a variety of methods, and experience an easier planning routine—all in Sales Planning.

### [Email, Calendar, and Integrations](#)

See a new view of suggested time slots for meetings. Learn about upcoming product retirements.

### [Sales Cloud Everywhere](#)

As sales reps search for prospects on the internet, the Sales Cloud Everywhere Chrome extension keeps up with their web investigations. Reps can update prospect and customer info and create records. They can use the grid-like view of their data in Workspace to manage deals. They can create their own Workspace tabs to customize the data they see. In the To Do list, sorting options, additional filters, and enhanced search functionality ensure a rep is focused on their most important tasks.

### [Salesforce Meetings](#)

Use Salesforce Meetings to enhance your interactions with prospects and customers. Ensure everyone is aligned before a meeting starts by seeing valuable meeting information with the Meeting Digest.

### [Other Changes in the Sales Cloud](#)

Learn about other changes we've made for Spring '24.

## Sales Cloud Einstein

Let Einstein generative AI draft sales emails from a sales rep's inbox and include related information. Connect to Google using a Google Workspace Marketplace app and troubleshoot Einstein Activity Capture with more metrics and ways to resolve users' issues. Learn insights from previously won deals with the Find Similar Opportunities action in Einstein Copilot.

### [Draft Personalized Sales Emails with Einstein](#)

Einstein Sales Emails empowers busy sales reps to move quickly and expand deals through personalized and informed email content that buyers love. Einstein 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 invitation, by choosing an email type. Email types can include product information or related objects. Reps can use preset email types and custom email types created by their admins.

### [Get More Options with Custom Sales Email Templates](#)

Users now have more choices when creating sales emails, which use generative AI. Sales email templates made in Prompt Builder are available to all sales email users.

### [Draft Sales Emails in More Languages](#)

Sales emails created with the Draft with Einstein button can generate localized content. If a user's Salesforce org is set to one of the supported languages, responses are localized into that language by default.

### [Let Users Enter Generative AI Instructions to Create Sales Emails](#)

Let sales reps take sales emails to the next level by creating their own generative AI drafts. Reps can still select pre-made instructions to draft personalized emails. Now they can also enter their own instructions for Einstein to use in creating a unique draft email. Reps can use the draft immediately or revise it until they get the output they're looking for.

### [Control Whether Users Can Enter Their Own Sales Email Prompt Instructions](#)

Sales reps can now enter prompt instructions for Einstein to use in creating a unique draft email. This feature is on by default. If your company isn't ready to let sales reps use generative AI to create sales emails, disable this feature.

### [Accelerate Productivity With Sales Summaries in Einstein Copilot \(Generally Available\)](#)

With Sales Summaries in Einstein Copilot, sales teams save time with quick, concise AI-generated summaries of accounts, contacts, leads, and opportunities. When users ask Einstein to summarize an account, contact, lead, or opportunity record, the Summarize Record copilot action uses a Sales Summaries prompt template to generate a formatted summary.

### [Identify Risky Deals in Your Seller's Forecast](#)

With Forecast Guidance in Einstein Copilot, sales managers get a quick and concise view of their seller's forecast for the current period. When users ask Einstein about a seller's forecast, the Get Forecast Guidance copilot action gathers data and states whether that sales rep is on track to meet their Commit and Most Likely quota, if any deals are at risk, and why.

### [Take the Next Best Step to Close More Deals](#)

Drive successful sales outcomes when you give your team a sales plan to follow that's personalized for their customers and processes. With Create Close Plan in Einstein Copilot, newly hired reps all the way up to the most experienced ones benefit from AI-generated plans that provide tactical advice to close deals successfully, quickly, and lucratively.

### [Reengage Customers with a Post-Call Email](#)

Boost sales when you equip your teams to use AI-generated emails based on their sales calls. Meeting Follow-Up Email is available in Einstein Copilot through the Draft or Revise Sales Email standard copilot action. When a user asks Einstein to write an email based on a customer call, the Draft or Revise Sales Email copilot action uses a Meeting Follow-Up Email internal-only prompt template to draft the email.

### [Learn Best Practices from Similar Won Deals](#)

With Find Similar Opportunities in Einstein Copilot, sales teams close deals faster using insights from previously won deals. When users ask Einstein to find deals similar to the one they're trying to close, the Find Similar Opportunities copilot action generates a formatted list of won deals. Review the deals and related records to better understand how each deal was won, and learn which strategies can be applied to your deal.

### [Einstein Activity Capture](#)

Use a Google Workspace Marketplace app to connect Salesforce to Google. Solve users' connectivity issues by resyncing and reconnecting users in Einstein Activity Capture Status & Metrics. And automate your business processes based on insights from emails, phone calls, and meeting recordings.

SEE ALSO:

[Einstein Features](#)

## Draft Personalized Sales Emails with Einstein

Einstein Sales Emails empowers busy sales reps to move quickly and expand deals through personalized and informed email content that buyers love. Einstein 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 invitation, by choosing an email type. Email types can include product information or related objects. Reps can use preset email types and custom email types created by their admins.

**Where:** This feature is available in Lightning Experience in Performance and Unlimited editions. Einstein generative AI is available in Lightning Experience.

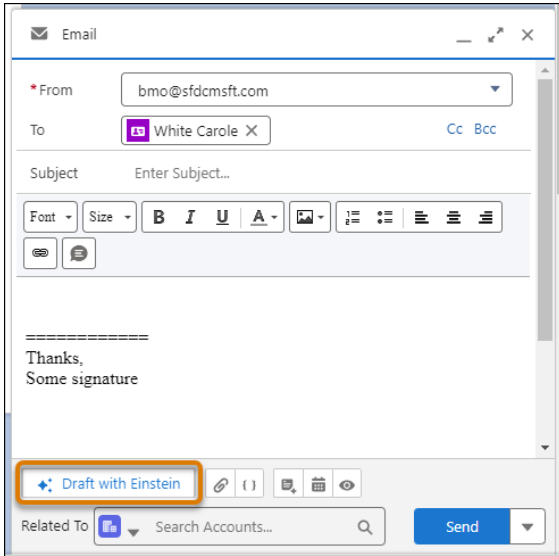
To purchase Einstein for Sales, contact your Salesforce account executive.

**Who:** To use Sales Emails, users need the Einstein Sales Emails permission set. To let reps access the feature in Gmail or Outlook, set up the Gmail or Outlook integration.

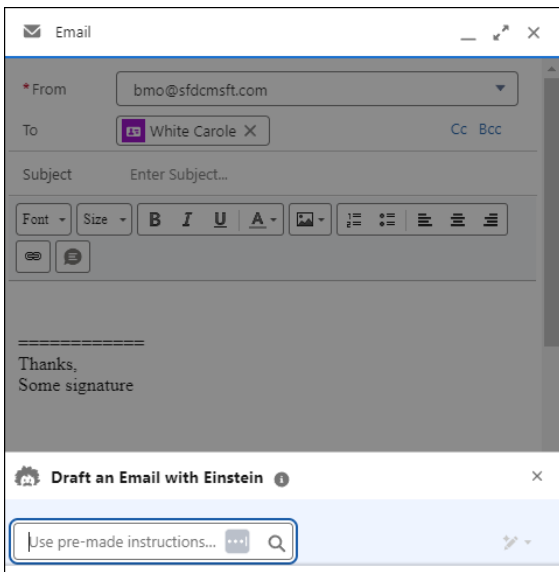
**Why:** Generative AI and large language models (LLMs) are the current talk of the town. But you need assurances that AI output is trustworthy and accurate. You can rely on Salesforce to uphold our #1 value, trust, and treat your data with care and security at the forefront.

**How:** In Lightning Experience, Einstein Sales Emails is built directly into the email composer. In Salesforce Outlook or Gmail integrations, users can see Einstein generative AI in the email application pane.

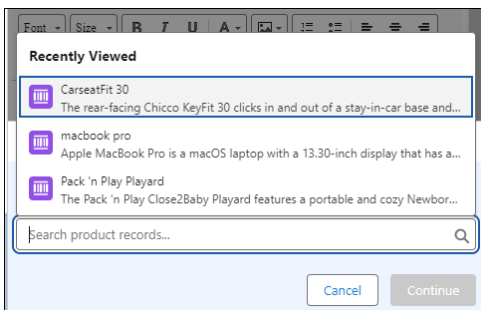
Start creating an email. Click **Draft with Einstein**.



Choose pre-made email instructions.



If the instructions use information from Salesforce, such as a product record, a selection window appears. Select or search for an existing product and click **Continue**.



The draft email appears. Review and edit the email, and then send it.

SEE ALSO:

[Salesforce Help: Draft a Sales Email with Einstein Generative AI \(can be outdated or unavailable during release preview\)](#)

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

## Get More Options with Custom Sales Email Templates

Users now have more choices when creating sales emails, which use generative AI. Sales email templates made in Prompt Builder are available to all sales email users.

**Where:** This feature is available in Lightning Experience in Performance and Unlimited editions.

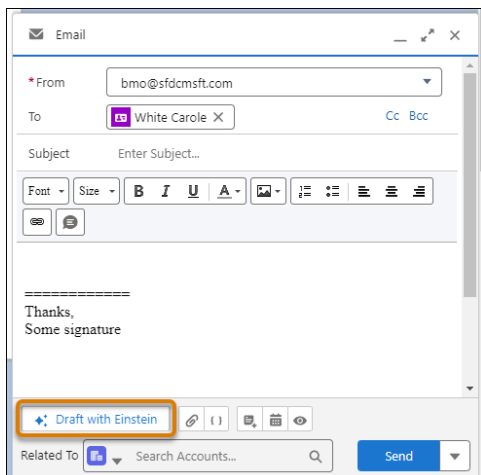
Einstein generative AI is available in Lightning Experience. To purchase Einstein for Sales, contact your Salesforce account executive.

**When:** This feature became available on February 29, 2024.

**Who:** To use custom sales email templates, users need the Einstein Prompt Builder license and Einstein GPT Prompt Template User permission set. To create custom sales email templates, users need the Einstein GPT Prompt Template Manager permission set.

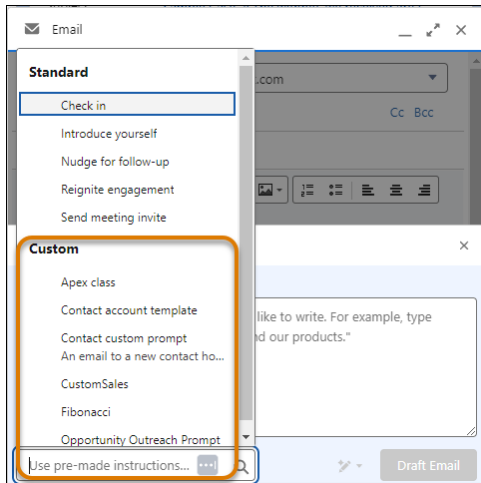
**How:** To let reps access this feature in Gmail or Outlook, set up the Gmail or Outlook integration.

Open an email composer.



Click **Draft with Einstein**.





Open the dropdown list and review the items listed under Custom.

If the email type uses information from Salesforce, such as a product record, a selection window appears. Select or search for an existing product and click **Continue**.

A proposed draft email appears for review. Review and edit the email, and then send it.

#### SEE ALSO:

[Get More Options in Your Email Integration with Custom Sales Email Templates](#)

[Salesforce Help: Draft a Sales Email with Einstein Generative AI \(can be outdated or unavailable during release preview\)](#)

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

## Draft Sales Emails in More Languages

Sales emails created with the Draft with Einstein button can generate localized content. If a user's Salesforce org is set to one of the supported languages, responses are localized into that language by default.

**Where:** This feature is available in Lightning Experience in Performance and Unlimited editions. Einstein generative AI is available in Lightning Experience. To purchase Einstein for Sales, contact your Salesforce account executive.

**When:** This feature became available on February 29, 2024.

**Why:** Prompt Builder supports these languages for generative responses.

- English
- French
- German
- Italian
- Japanese
- Spanish

#### SEE ALSO:

[Salesforce Help: Localizing Prompt Template Responses \(can be outdated or unavailable during release preview\)](#)

## Let Users Enter Generative AI Instructions to Create Sales Emails

Let sales reps take sales emails to the next level by creating their own generative AI drafts. Reps can still select pre-made instructions to draft personalized emails. Now they can also enter their own instructions for Einstein to use in creating a unique draft email. Reps can use the draft immediately or revise it until they get the output they're looking for.

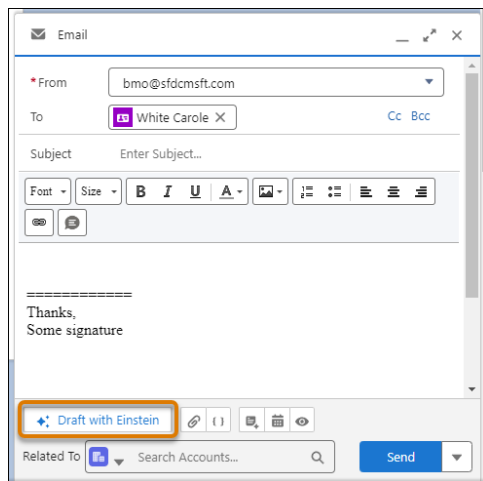
**Where:** This feature is available in Lightning Experience in Performance and Unlimited editions. Einstein generative AI is available in Lightning Experience.

To purchase Einstein for Sales, contact your Salesforce account executive.

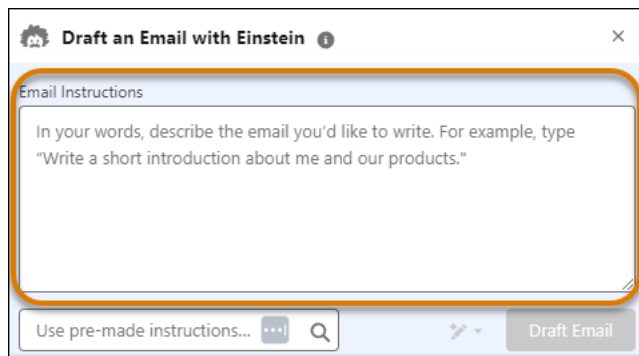
**When:** This feature became available on April 11, 2024.

**Who:** To use Sales Emails, users need the Einstein Sales Emails permission set. To let reps access the feature in Gmail or Outlook, set up the Gmail or Outlook integration.

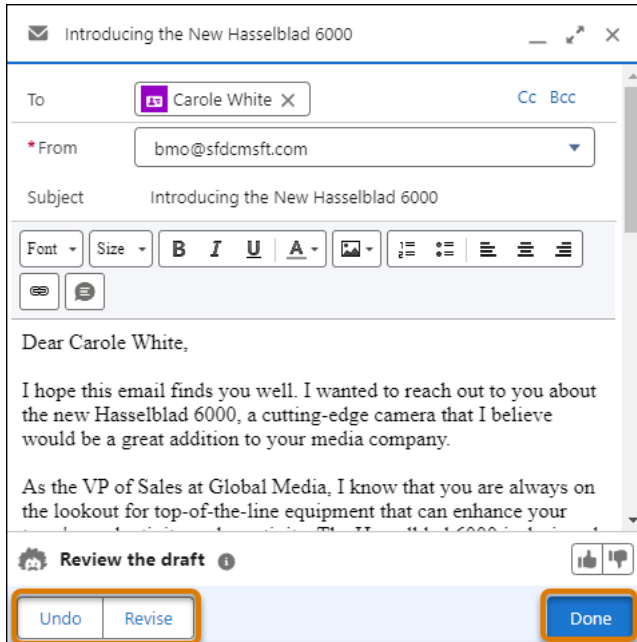
**How:** Open an email composer.



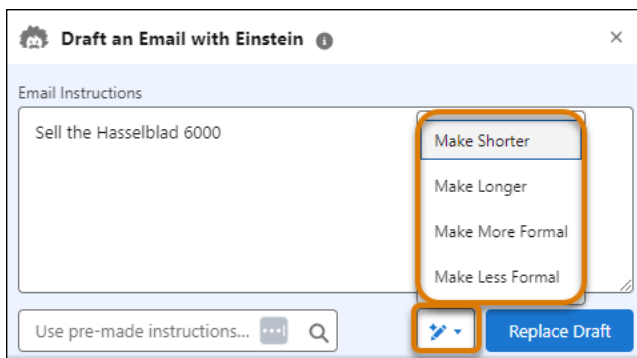
Click **Draft with Einstein**



Enter instructions for Einstein and click **Draft Email**.



A proposed draft email appears for review.



Send the email, or revise the draft by altering the email instructions, choosing from the pre-made instructions, or selecting from the adjustment choices.

SEE ALSO:

[Enter Generative AI Instructions to Create Sales Emails in Email Integrations](#)

[Control Whether Users Can Enter Their Own Sales Email Prompt Instructions](#)

[Salesforce Help: Draft a Sales Email with Einstein Generative AI \(can be outdated or unavailable during release preview\)](#)

## Control Whether Users Can Enter Their Own Sales Email Prompt Instructions

Sales reps can now enter prompt instructions for Einstein to use in creating a unique draft email. This feature is on by default. If your company isn't ready to let sales reps use generative AI to create sales emails, disable this feature.

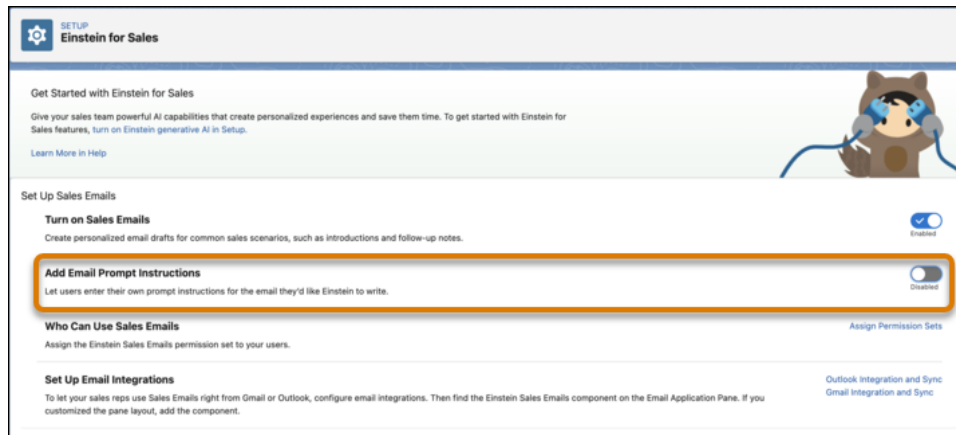
**Where:** This feature is available in Lightning Experience in Performance and Unlimited editions, when using the Lightning email composer. Einstein generative AI is available in Lightning Experience.

To purchase Einstein for Sales, contact your Salesforce account executive.

**When:** This feature became available on April 11, 2024.

**Who:** To use Sales Emails, users need the Einstein Sales Emails permission set. To let reps access the feature in Gmail or Outlook, set up the Gmail or Outlook integration.

**How:** In Setup, enter *Einstein for Sales* and select **Einstein for Sales**.



Disable **Add Email Prompt Instructions**.

SEE ALSO:

[Let Users Enter Generative AI Instructions to Create Sales Emails](#)

[Salesforce Help: Control If Users Can Enter Their Own Sales Email Prompt Instructions \(can be outdated or unavailable during release preview\)](#)

## Accelerate Productivity With Sales Summaries in Einstein Copilot (Generally Available)

With Sales Summaries in Einstein Copilot, sales teams save time with quick, concise AI-generated summaries of accounts, contacts, leads, and opportunities. When users ask Einstein to summarize an account, contact, lead, or opportunity record, the Summarize Record copilot action uses a Sales Summaries prompt template to generate a formatted summary.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions with the Einstein for Sales add-on. Einstein generative AI is available in Lightning Experience. Setup for Einstein Copilot is available on the desktop site.

To purchase the Einstein for Sales add-on, contact your Salesforce account executive.

**Who:** This feature is available to users with the Sales Summaries User permission set. Users also need the Use Einstein Copilot for Salesforce permission to access Copilot and the Execute Prompt Templates permission to run prompt templates.

**How:** To get started with Sales Summaries, turn on Einstein generative AI in Setup. Then, turn on Einstein Copilot for Salesforce from the Einstein Copilot Setup page. Your new copilot is available on the Einstein Copilot Setup page.

To customize the standard Sales Summaries prompt templates, go to Prompt Builder and clone and edit the templates. To edit the standard flow templates for Sales Summaries, go to Flows and select the Sales Summaries flow that you want to customize.

To continue setting up and customizing Sales Summaries, see [Set Up Einstein Copilot](#).

SEE ALSO:

[Meet Your Team's Trusted AI Assistant](#)


[Salesforce Help: Set Up Sales Summaries in Einstein Copilot](#)

[Salesforce Help: Copilot Action: Summarize Record](#)

## Identify Risky Deals in Your Seller's Forecast

With Forecast Guidance in Einstein Copilot, sales managers get a quick and concise view of their seller's forecast for the current period. When users ask Einstein about a seller's forecast, the Get Forecast Guidance copilot action gathers data and states whether that sales rep is on track to meet their Commit and Most Likely quota, if any deals are at risk, and why.

**Where:** This change applies to Lightning Experience, the Salesforce mobile app for iOS and Android, in Enterprise, Performance, and Unlimited editions with the Einstein for Sales add-on. Setup for Einstein Copilot is available on the desktop site.

 **Note:** To purchase the Einstein for Sales add-on, contact your Salesforce account executive.

**When:** Get Forecast Guidance is available in mid April.

**Who:** This feature is available to users with the Forecast Guidance User user permission. Users also need the Use Einstein Copilot for Salesforce user permission to access Copilot.

**How:** This feature works in Einstein Copilot through the Get Forecast Guidance copilot action. To get started, turn on Einstein generative AI in Setup. Then, turn on Einstein Copilot for Salesforce from the Einstein Copilots page. Your new copilot is available on the Einstein Copilots page. Next, add the GetForecastGuidance sales action to your copilot and assign the required user perm.

SEE ALSO:

[Einstein Copilot](#)

[Salesforce Help: Set Up Einstein Copilot](#)

[Salesforce Help: Copilot Action: Get Forecast Guidance](#)

## Take the Next Best Step to Close More Deals

Drive successful sales outcomes when you give your team a sales plan to follow that's personalized for their customers and processes. With Create Close Plan in Einstein Copilot, newly hired reps all the way up to the most experienced ones benefit from AI-generated plans that provide tactical advice to close deals successfully, quickly, and lucratively.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions with the Einstein for Sales add-on. Setup for Einstein Copilot is available on the desktop site.

To purchase the Einstein for Sales add-on, contact your Salesforce account executive.

**When:** Einstein Create Close Plan is available in April 2024.

**Who:** This feature is available to users with the Close Plan user permission set. Users also need the Use Einstein Copilot for Salesforce permission to access Copilot and the Execute Prompt Templates permission to run prompt templates.

**How:** To get started with Create Close Plans, turn on Einstein generative AI in Setup. Then, turn on Einstein Copilot for Salesforce from the Einstein Copilots page in Setup. Your new copilot is available on the Einstein Copilot Setup page.

Users launch Einstein Copilot in Salesforce and request help with closing a deal by entering phrases such as “What steps should I take to close the Acme compliance software solution deal?” Einstein generates a close plan that includes suggested steps and due dates.

SEE ALSO:

[Salesforce Help: Copilot Action: Create Close Plan](#)

[Salesforce Help: Set Up Create Close Plan in Einstein Copilot](#)

[Salesforce Help: Set Up Einstein Copilot](#)

## Reengage Customers with a Post-Call Email

Boost sales when you equip your teams to use AI-generated emails based on their sales calls. Meeting Follow-Up Email is available in Einstein Copilot through the Draft or Revise Sales Email standard copilot action. When a user asks Einstein to write an email based on a customer call, the Draft or Revise Sales Email copilot action uses a Meeting Follow-Up Email internal-only prompt template to draft the email.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions with the Einstein for Sales add-on. Setup for Einstein Copilot is available on the desktop site.

To purchase the Einstein for Sales add-on, contact your Salesforce account executive.

**When:** Einstein Meeting Follow-Up Email is available in April 2024.

**Who:** This feature is available to users with the Sales Meeting Follow-Up Emails user permission set. Users also need the Use Einstein Copilot for Salesforce permission to access Copilot and the Execute Prompt Templates permission to run prompt templates.

**How:** To get started with Meeting Follow-Up Email, turn on Einstein generative AI and Einstein Conversation Insights in Setup. Then turn on Einstein Copilot for Salesforce from the Einstein Copilot Setup page. Then give your users the Sales Meeting Follow-Up Emails user permission set. A call summary and call transcript are required to generate a meeting follow-up email.

Users launch Einstein Copilot in Salesforce and request a follow-up email by entering phrases such as "Draft a follow-up email for the meeting with Sarah Ling." Einstein generates an email based on the call summary and transcript.

SEE ALSO:

[Salesforce Help: Copilot Action: Draft or Revise Email](#)

[Salesforce Help: Set Up Meeting Follow-Up Email in Einstein Copilot](#)

[Salesforce Help: Set Up Einstein Copilot](#)

## Learn Best Practices from Similar Won Deals

With Find Similar Opportunities in Einstein Copilot, sales teams close deals faster using insights from previously won deals. When users ask Einstein to find deals similar to the one they're trying to close, the Find Similar Opportunities copilot action generates a formatted list of won deals. Review the deals and related records to better understand how each deal was won, and learn which strategies can be applied to your deal.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions with the Einstein for Sales add-on. Einstein Copilot is included in Unlimited+. Setup for Einstein Copilot is available on the desktop site.

To purchase the Einstein for Sales add-on, contact your Salesforce account executive.

**When:** Find Similar Opportunities is available in late April 2024.

**Who:** Users need the Use Einstein Copilot for Salesforce user permission to access Copilot.

**How:** This feature works in Einstein Copilot through the Find Similar Records copilot action. To get started, turn on Einstein generative AI in Setup. Then, turn on Einstein Copilot for Salesforce from the Einstein Copilots page. Your new copilot is available on the Einstein Copilots page. Next, add the Find Similar Opportunities sales action to your copilot and assign the required user permissions.

SEE ALSO:

[Einstein Copilot](#)

[Salesforce Help: Set Up Einstein Copilot](#)

[Copilot Action: Find Similar Opportunities](#)

## Einstein Activity Capture

Use a Google Workspace Marketplace app to connect Salesforce to Google. Solve users' connectivity issues by resyncing and reconnecting users in Einstein Activity Capture Status & Metrics. And automate your business processes based on insights from emails, phone calls, and meeting recordings.

### [Connect Google to Salesforce with a Google Workspace Marketplace App](#)

When setting up Einstein Activity Capture, you can now connect to Salesforce with the new Einstein Activity Capture app on Google Workspace Marketplace. This authentication method provides controlled access to your Google servers while letting you manage users directly in the Google Workspace Marketplace app.

### [Resolve User Connection and Synchronization Issues Quickly to Improve Performance](#)

When you check user health status in Einstein Activity Capture Status & Metrics, you can now reconnect users' connections and resync data. Also, to help you troubleshoot issues, you get a complete picture of the user's configuration settings. New event synchronization reports, connection graphs, and initial sync data illustrate users' connection and sync times to help you improve performance.

### [Get In-App and Email Notifications When Users' Connections Are in Trouble](#)

Reduce your support queue and increase user satisfaction by staying aware of connection issues. As a Salesforce admin, you can now receive notifications in the app and by email when your users' Einstein Activity Capture connections have a status of Disabled or Needs Attention.

### [Address Your Users' Connection Issues Quickly by Seeing Org ID and Username in Notifications](#)

You can opt to send notifications when your users' Einstein Activity Capture connections have a status of Disabled or Needs Attention. Previously, email notifications contained your org name only. This change doesn't apply to in-app notifications.

### [Get Fewer User Connection Notifications](#)

Receive notifications every 7 days when your users' Einstein Activity Capture connections have a status of Disabled or Needs Attention. Previously, notifications were sent every 24 hours.

### [Trigger Flows from Activity Insights](#)

You can now automate your business processes and record management by triggering flows from insight data from Einstein Activity Capture and Einstein Conversation Insights. For example, if a competitor's product name is mentioned in an email insight, you can trigger a flow to update the related opportunity and create a task for the sales rep automatically. Previously, you couldn't access insight data in flows.

### [See More Activities Dashboards in One Place](#)

Now you can access the Activities Analytics and Activity 360 (My Team's Activities This Month) dashboards directly from the Activities Dashboards tab. Previously, the Activity 360 dashboard appeared in the Dashboards tab.

### [More Salesforce Orgs Are Eligible for Activity 360 Reporting](#)

If you have fewer than 3 million combined accounts, contacts, contracts, leads, and opportunities, your org is eligible to use Activity 360 reporting. Previously, eligible orgs were limited to fewer than 1.5 million combined accounts, contacts, contracts, leads, and opportunities.

### [Service Account OAuth 2.0 Authentication to Microsoft Office 365 Is Being Retired](#)

You now see warnings when you set up Einstein Activity Capture to connect to Microsoft Office 365 with service account OAuth 2.0 authentication. Starting in May 2024, Microsoft blocks the assignment of the ApplicationImpersonation role in Exchange Online, which prevents the role being used for new service accounts. To connect to Microsoft Office 365, we recommend using org-level OAuth 2.0 authentication.

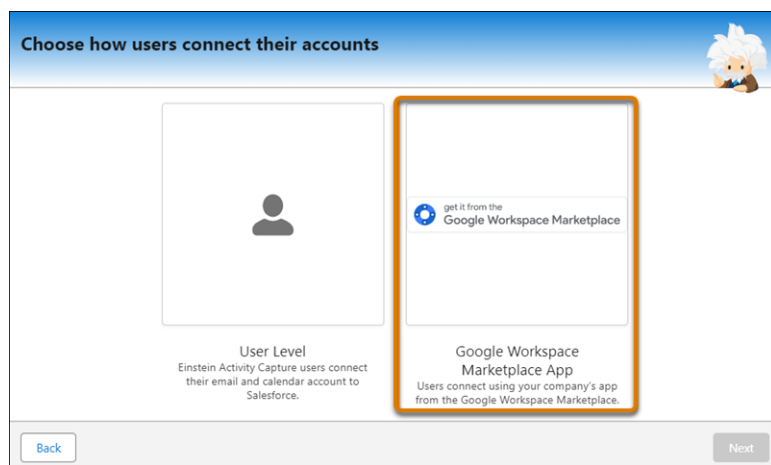
## Connect Google to Salesforce with a Google Workspace Marketplace App

When setting up Einstein Activity Capture, you can now connect to Salesforce with the new Einstein Activity Capture app on Google Workspace Marketplace. This authentication method provides controlled access to your Google servers while letting you manage users directly in the Google Workspace Marketplace app.

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

**Who:** To access this authentication method, you must have global administrator access to your company's Google account.

**How:** If you're setting up Einstein Activity Capture for the first time, select **Google Workspace Marketplace App** as your authentication method.



If you've set up Einstein Activity Capture and want to change your authentication method, reset Einstein Activity Capture. After the reset process is complete, set up Einstein Activity Capture again and select **Google Workspace Marketplace App** as the authentication method.

SEE ALSO:

[Salesforce Help: Connect to Einstein Activity Capture with a Google Workspace Marketplace App \(can be outdated or unavailable during release preview\)](#)

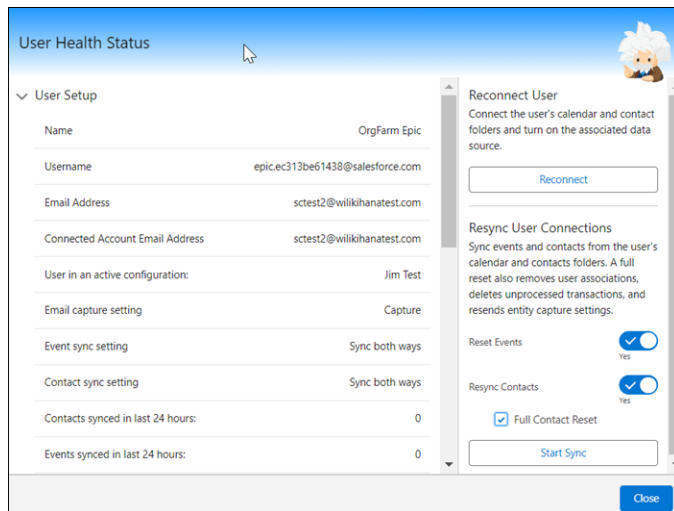
## Resolve User Connection and Synchronization Issues Quickly to Improve Performance

When you check user health status in Einstein Activity Capture Status & Metrics, you can now reconnect users' connections and resync data. Also, to help you troubleshoot issues, you get a complete picture of the user's configuration settings. New event synchronization reports, connection graphs, and initial sync data illustrate users' connection and sync times to help you improve performance.



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

**How:** From Setup, in the Quick Find box, enter *Einstein Activity Capture*, and then select **Status & Metrics**. On the User Status tab, select **Check User Health Status** from the dropdown list.



SEE ALSO:

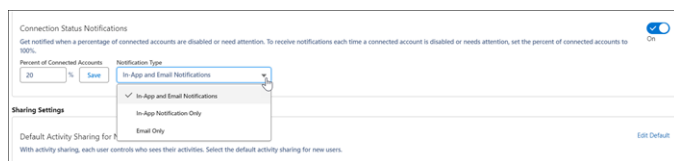
[Salesforce Help: Check Connection Status and Metrics for Einstein Activity Capture Users \(can be outdated or unavailable during release preview\)](#)

## Get In-App and Email Notifications When Users' Connections Are in Trouble

Reduce your support queue and increase user satisfaction by staying aware of connection issues. As a Salesforce admin, you can now receive notifications in the app and by email when your users' Einstein Activity Capture connections have a status of Disabled or Needs Attention.

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

**How:** To check your notification settings, go to the Connection Status Notifications section of Einstein Activity Capture Settings in Setup. Set a threshold to get notified when a percentage of connected accounts has the status of Disabled or Needs Attention.



SEE ALSO:

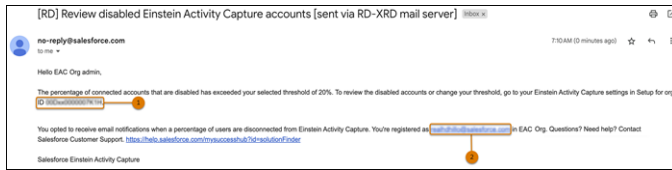
[Salesforce Help: Check Connection Status and Metrics for Einstein Activity Capture Users \(can be outdated or unavailable during release preview\)](#)

## Address Your Users' Connection Issues Quickly by Seeing Org ID and Username in Notifications

You can opt to send notifications when your users' Einstein Activity Capture connections have a status of Disabled or Needs Attention. Previously, email notifications contained your org name only. This change doesn't apply to in-app notifications.

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

**How:** The org ID is in the first paragraph of the email (1) and your username is in the second paragraph (2).



To check your notification settings, go to the Connection Status Notifications section of Einstein Activity Capture Settings in Setup.

SEE ALSO:

[Salesforce Help: Check Connection Status and Metrics for Einstein Activity Capture Users](#)

## Get Fewer User Connection Notifications

Receive notifications every 7 days when your users' Einstein Activity Capture connections have a status of Disabled or Needs Attention. Previously, notifications were sent every 24 hours.

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

**How:** To check your notification settings, go to the Connection Status Notifications section of Einstein Activity Capture Settings in Setup.

SEE ALSO:

[Salesforce Help: Get Notified When Users' Connections Are in Trouble](#)

## Trigger Flows from Activity Insights

You can now automate your business processes and record management by triggering flows from insight data from Einstein Activity Capture and Einstein Conversation Insights. For example, if a competitor's product name is mentioned in an email insight, you can trigger a flow to update the related opportunity and create a task for the sales rep automatically. Previously, you couldn't access insight data in flows.

**Where:** This change applies to Lightning Experience in Unlimited Edition. Available in Professional and Enterprise editions with one of these add-on licenses: Sales Cloud Einstein, Sales Engagement, or Revenue Intelligence.

**Who:** This feature is available to users who have Activity 360 Reporting enabled. Triggering actions from insights also requires that Einstein Activity Capture or Einstein Conversation Insights is enabled.

**How:** In Flow Builder, create a flow based on a platform event, such as `ConversationInsightEvent`. Then, specify the criteria you want to use to trigger an action, such as creating a task. For example, `InsightTypeName=competitor` or `InsightKeywords=Hubspot`.

SEE ALSO:

[Salesforce Help: Reporting on Logged and Captured Activities From Einstein Activity Capture \(can be outdated or unavailable during release preview\)](#)

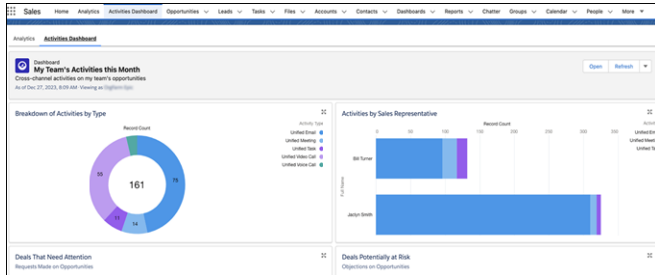
## See More Activities Dashboards in One Place

Now you can access the Activities Analytics and Activity 360 (My Team's Activities This Month) dashboards directly from the Activities Dashboards tab. Previously, the Activity 360 dashboard appeared in the Dashboards tab.

**Where:** This change applies to Lightning Experience in Unlimited Edition. Available in Professional and Enterprise editions with one of these add-on licenses: Sales Cloud Einstein, Sales Engagement, or Revenue Intelligence.

**Who:** This feature is available to users who have Activity 360 Reporting or Activities Dashboard enabled.

**How:** On the Activities Dashboard tab, go to the dashboard you're interested in.



SEE ALSO:

[Salesforce Help: Get Started With Activity 360 Reports](#)

[Salesforce Help: Activities Analytics Dashboard](#)

## More Salesforce Orgs Are Eligible for Activity 360 Reporting

If you have fewer than 3 million combined accounts, contacts, contracts, leads, and opportunities, your org is eligible to use Activity 360 reporting. Previously, eligible orgs were limited to fewer than 1.5 million combined accounts, contacts, contracts, leads, and opportunities.

**Where:** This change applies to Lightning Experience in Unlimited Edition. Available in Professional and Enterprise editions with one of these add-on licenses: Sales Cloud Einstein, Sales Engagement, or Revenue Intelligence.

**Who:** This feature is available if you have Activity 360 Reporting enabled.

SEE ALSO:

[Salesforce Help: Considerations for Activity 360 Reporting](#)

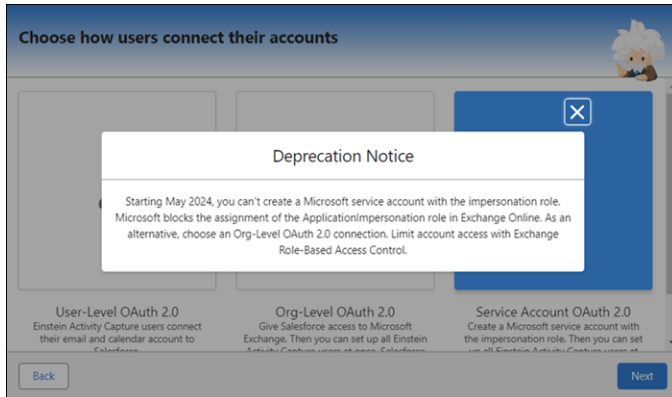
## Service Account OAuth 2.0 Authentication to Microsoft Office 365 Is Being Retired

You now see warnings when you set up Einstein Activity Capture to connect to Microsoft Office 365 with service account OAuth 2.0 authentication. Starting in May 2024, Microsoft blocks the assignment of the ApplicationImpersonation role in Exchange Online, which prevents the role being used for new service accounts. To connect to Microsoft Office 365, we recommend using org-level OAuth 2.0 authentication.

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

**How:** Your existing Microsoft Office 365 connections that use service account OAuth2.0 authentication continue to work until Spring '25 in February 2025. At that time, those connections are retired.

If you set up Einstein Activity Capture and want to change to an org-level OAuth 2.0 authentication method, reset Einstein Activity Capture. After the reset process is complete, set up Einstein Activity Capture again and select **Org-Level OAuth 2.0** as the authentication method for the service account. You can scope authentication to a specific set of users with Microsoft Exchange Role Based Access Control.



## SEE ALSO:

[Salesforce Help: Use a Service Account to Connect Microsoft Office 365 and Einstein Activity Capture](#)

[Microsoft Exchange Team Blog: Retirement of RBAC Application Impersonation in Exchange Online](#)

## Einstein Conversation Insights

Ask anything about your sales calls with Call Explorer! Using generative AI, Call Explorer answers questions related to a call about competitor mentions, coaching opportunities, and more directly from voice and video call records. Another Einstein feature, Call Summaries, is supported in more languages. We expanded our compatible video providers to include Microsoft Teams and Google Meet, and have full support for a few voice providers. You can quickly see license and account usage from the new Status and Usage page. And we expanded the ability for reps to assign the participants on a call.

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.

### [Ask Call Questions with Call Explorer Powered by Einstein](#)

Harness the power of generative AI to get answers to anything you want to know about a sales call. Einstein Conversation Insights users can ask questions directly from voice and video call records. Powered by Einstein, the new Call Explorer allows users to quickly gather information about a call, such as product mentions, deal risk, or outstanding customer questions.

### [See Call Summaries in Languages Other than English](#)

Use Einstein-powered Call Summaries in other languages. Einstein Conversation Insights users can now create and edit summaries for voice and video calls in languages other than English.

### [Use Einstein Conversation Insights with Microsoft Teams and Google Meet](#)

Einstein Conversation Insights supports Microsoft Teams and Google Meet as video providers! Your sales teams using Microsoft Teams and Google Meet can connect their accounts to Salesforce to get transcripts, insights, and action items for their video meetings. Users can play recordings of conversations, jump to key mentions, and potentially access features powered by generative AI to supercharge their sales process.

### [See the License Usage and User Status for Einstein Conversation Insights](#)

See metrics about Einstein Conversation Insights (ECI) licenses and connected video accounts. You can download CSV files of users based on video account status or see the status of ECI users with connected video accounts.

### [Use Einstein Conversation Insights in More Languages](#)

Einstein Conversation Insights now supports 20 additional languages, including Polish, Vietnamese, and many more. With support for over three dozen languages, your sales and service teams across the world can now use Einstein Conversation Insights to get transcripts, see call insights, and provide coaching recommendations.

### [Add Call Participants to Video Call Records with Ease](#)

It's important to know who's on a call, who's speaking, and what the call is related to. Your sales teams can edit the listed participants on a video call to refer to a specific Salesforce record.

### [Access Full Support for More Voice Providers](#)

Einstein Conversation Insights has full support for 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. Visit AppExchange to add the new providers.

### [Get 10 Einstein Conversation Insights Licenses with Enterprise Edition](#)

Give your sales teams using Enterprise Edition insights about their customer calls and surface coachable moments. If you're using Sales Cloud Enterprise Edition, you can access 10 Einstein Conversation Insights licenses. Play recordings of conversations to gain visibility into mentions of competitors, products, custom keywords, pricing discussions, and next steps.

### [Access Dashboard Improvements](#)

Enhanced dashboard features are available to Einstein Conversation Insights (ECI) users. Filter by manager, call duration, language, and use a custom call date filter.

### [Identify Speakers on Mono Calls](#)

What's not to like about improved speaker matching? Einstein Conversation Insights can automatically identify the sales rep and customer on English mono calls, based on contextual factors in the text of the conversation.

### [Get More Details About Errors](#)

We improved the error handling for Einstein Conversation Insights (ECI) processing states. See more detailed information about an issue, such as whether a call was too short to process or a user didn't have access to ECI at the time a call was made.

SEE ALSO:

[Einstein Features](#)

## Ask Call Questions with Call Explorer Powered by Einstein

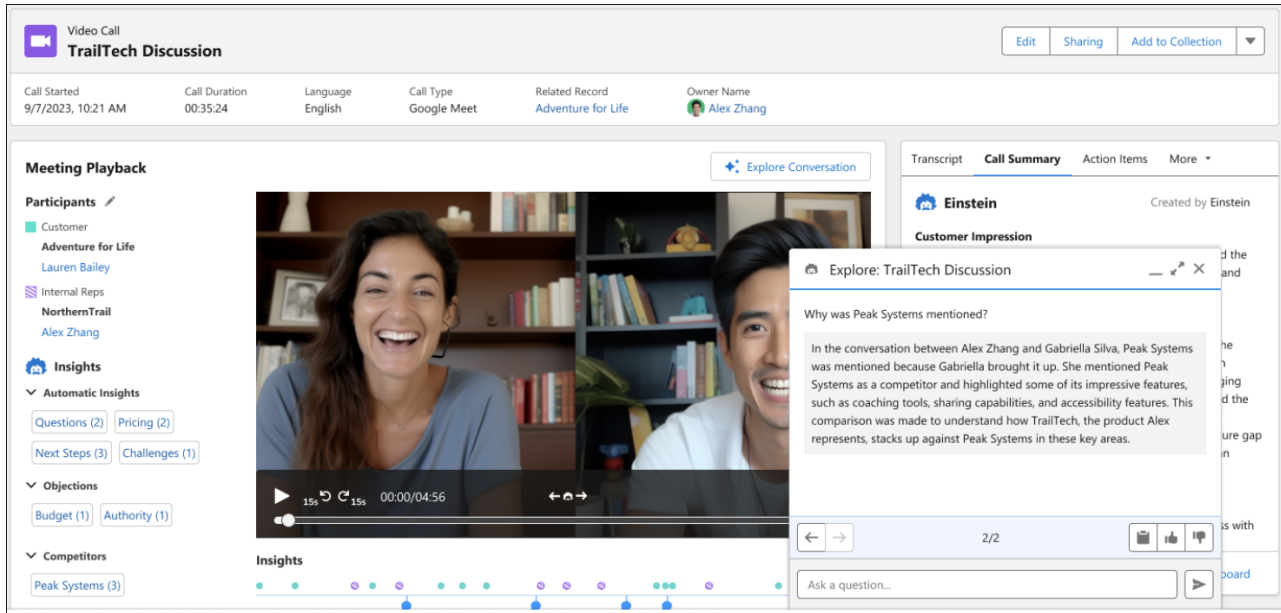
Harness the power of generative AI to get answers to anything you want to know about a sales call. Einstein Conversation Insights users can ask questions directly from voice and video call records. Powered by Einstein, the new Call Explorer allows users to quickly gather information about a call, such as product mentions, deal risk, or outstanding customer questions.

**Where:** This feature requires Einstein Conversation Insights and Einstein for Sales, and is available in Lightning Experience in Performance and Unlimited editions. Einstein generative AI is available in Lightning Experience.

To purchase Einstein for Sales, contact your Salesforce account executive.

**Who:** This feature is available to users with the Einstein Sales Call Explorer permission set and access to a voice or video call record.

**Why:** To bring up Call Explorer, use the **Explore Conversation** button.



Enter questions related to the call, and Einstein provides an answer.

Call Explorer delivers one answer per query. You can toggle between different questions you've asked with the arrow buttons. Call Explorer is currently supported for calls in English, French, German, Italian, Japanese, and Spanish.

Call Explorer is also available in Einstein Copilot as a standard action. For more information, see [Launch Your Copilot Quickly with Standard Actions](#).

**How:** Turn on the feature from the Einstein for Sales page in Setup.

## See Call Summaries in Languages Other than English

Use Einstein-powered Call Summaries in other languages. Einstein Conversation Insights users can now create and edit summaries for voice and video calls in languages other than English.

**Where:** This feature requires Einstein Conversation Insights and Einstein for Sales, and is available in Lightning Experience in Performance and Unlimited editions. Einstein generative AI is available in Lightning Experience.

To purchase Einstein for Sales, contact your Salesforce account executive.

**Who:** This feature is available to users with the Einstein Sales Call Summaries permission set and access to a voice or video call record. Users without the permission set can see and copy summary data if they have access to the record, but they can't create or edit call summaries.

**Why:** These languages are currently supported:

- English
- French
- German
- Italian
- Japanese
- Spanish



Call summaries are limited to calls that include a transcript. Sometimes summaries not generated for lengthy calls.

**How:** Einstein Conversation Insights automatically determines the language used in call recordings.

For information about setting up Call Summaries, see Salesforce Help.

SEE ALSO:

[Salesforce Help: Add Call Summaries to Voice Calls, Video Calls, and Related Records \(can be outdated or unavailable during release preview\)](#)

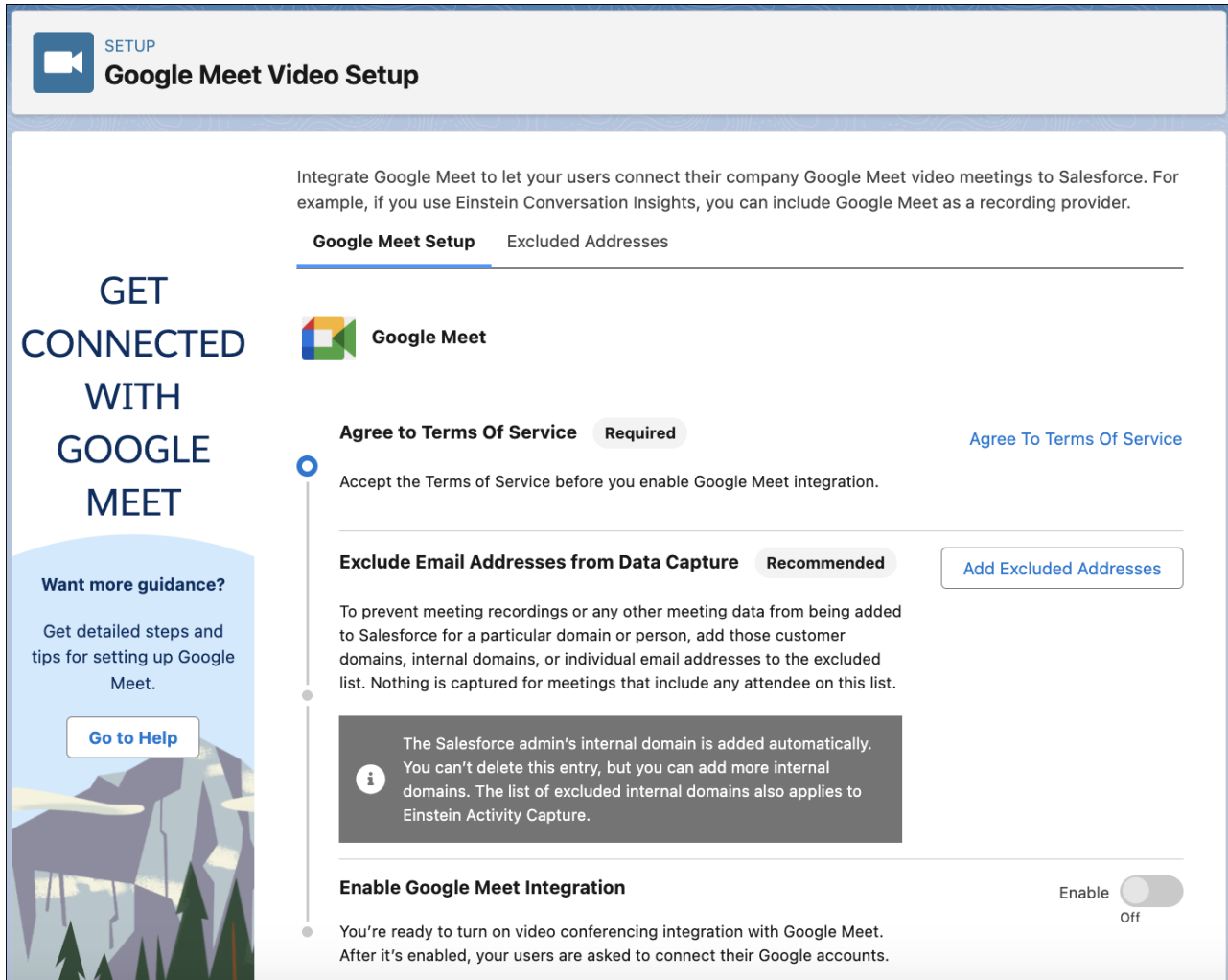
## Use Einstein Conversation Insights with Microsoft Teams and Google Meet

Einstein Conversation Insights supports Microsoft Teams and Google Meet as video providers! Your sales teams using Microsoft Teams and Google Meet can connect their accounts to Salesforce to get transcripts, insights, and action items for their video meetings. Users can play recordings of conversations, jump to key mentions, and potentially access features powered by generative AI to supercharge their sales process.

**Where:** This change applies to Einstein Conversation Insights in Lightning Experience. Einstein Conversation Insights is available in Enterprise, Performance and Unlimited editions, and as an add-on in Enterprise Edition for more than 10 users.

**When:** Google Meet is generally available as a video provider later in March 2024.

**How:** To enable video provider integration, from Setup, go to General Settings under Einstein Conversation Insights. In the Video Recording Provider section, click **Set Up** next to Microsoft Teams or Google Meet.



**SETUP**  
**Google Meet Video Setup**

Integrate Google Meet to let your users connect their company Google Meet video meetings to Salesforce. For example, if you use Einstein Conversation Insights, you can include Google Meet as a recording provider.

**Google Meet Setup** Excluded Addresses

**GET CONNECTED WITH GOOGLE MEET**

Want more guidance?  
Get detailed steps and tips for setting up Google Meet.  
[Go to Help](#)

**Google Meet**

**Agree to Terms Of Service** **Required** [Agree To Terms Of Service](#)

Accept the Terms of Service before you enable Google Meet integration.

**Exclude Email Addresses from Data Capture** **Recommended** [Add Excluded Addresses](#)

To prevent meeting recordings or any other meeting data from being added to Salesforce for a particular domain or person, add those customer domains, internal domains, or individual email addresses to the excluded list. Nothing is captured for meetings that include any attendee on this list.

**The Salesforce admin's internal domain is added automatically. You can't delete this entry, but you can add more internal domains. The list of excluded internal domains also applies to Einstein Activity Capture.**

**Enable Google Meet Integration** **Enable**  **Off**

You're ready to turn on video conferencing integration with Google Meet. After it's enabled, your users are asked to connect their Google accounts.

For more information, see [Connect Video Recording Providers](#) in Salesforce Help.

**Note:** After Microsoft Teams or Google Meet is enabled, Einstein Conversation Insights users see a banner noting that the video provider is supported and a link to their personal settings page. Users must connect their accounts to use Microsoft Teams or Google Meet with Einstein Conversation Insights.

To improve speaker identification, we recommend turning on Einstein Activity Capture. Einstein Conversation Insights can use Einstein Activity Capture calendar integration to match call participants with existing contact records.

Microsoft Teams support is limited to orgs under 30,000 users at the beginning of Spring '24.

Microsoft Teams meetings created within the context of a channel are not supported. Channel meetings are saved to SharePoint and are not processed by Einstein Conversation Insights.

SEE ALSO:

[Salesforce Help: Set Up Einstein Activity Capture \(can be outdated or unavailable during release preview\)](#)

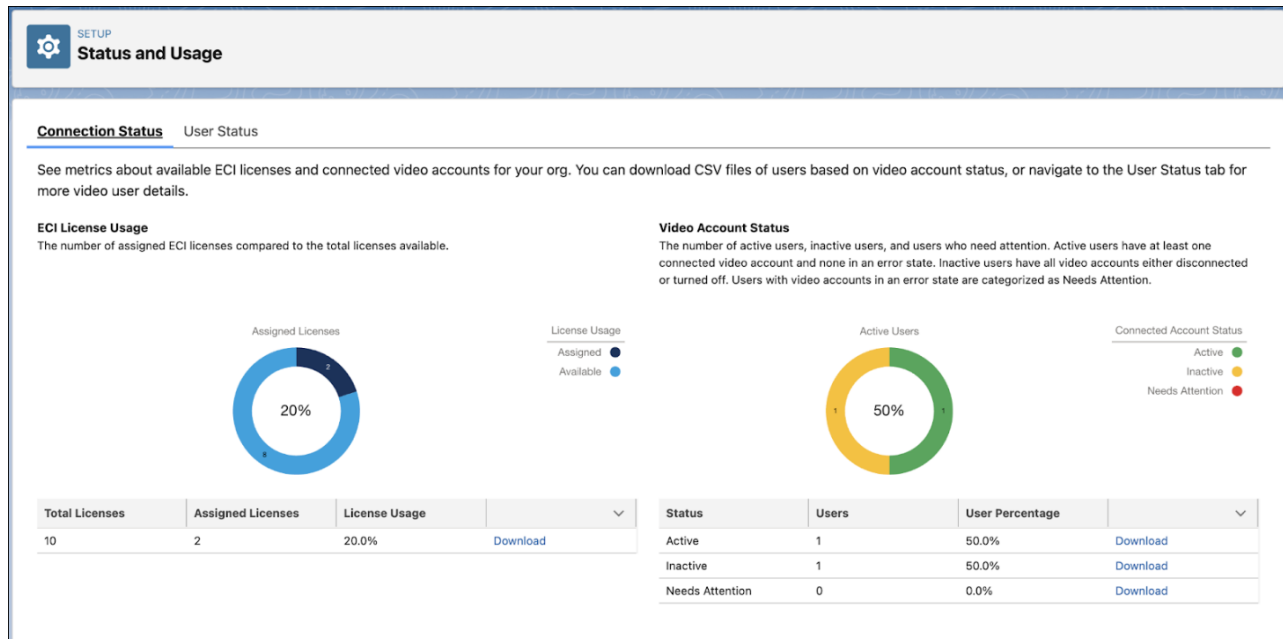


## See the License Usage and User Status for Einstein Conversation Insights

See metrics about Einstein Conversation Insights (ECI) licenses and connected video accounts. You can download CSV files of users based on video account status or see the status of ECI users with connected video accounts.

**Where:** This change applies to Einstein Conversation Insights in Lightning Experience. Einstein Conversation Insights is available in Enterprise, Performance and Unlimited editions, and as an add-on in Enterprise Edition for more than 10 users.

**Why:** The Connection Status tab shows ECI license usage and video connector status.



The ECI License Usage section shows the number of assigned ECI licenses compared to the total licenses available.

The Video Connector Status section shows the number of active users, inactive users, and users who need attention. Active users have at least one connected video account and none in an error state. Inactive users have all video accounts either disconnected or turned off. Users with video accounts in an error state are categorized as Needs Attention.

The User Status tab shows the status of ECI users with connected video accounts, including whether the video account is connected (Active), not yet connected or turned off (Inactive), or the connection is in an error state (Needs Attention). Search by username or filter users by account type or connection status. To make sure calls are processed, check that the email addresses for the user and video account match.

**How:** Access the metrics from the Status and Usage page under Einstein Conversation Insights in Setup.

## Use Einstein Conversation Insights in More Languages

Einstein Conversation Insights now supports 20 additional languages, including Polish, Vietnamese, and many more. With support for over three dozen languages, your sales and service teams across the world 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 Enterprise, Performance and Unlimited editions, and as an add-on in Enterprise Edition for more than 10 users.

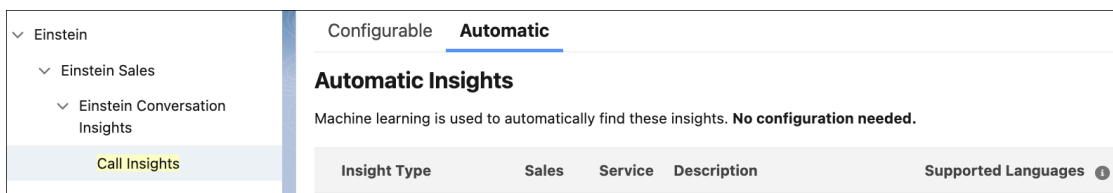
**Why:** The following languages are now supported.

- Bulgarian

- Catalan
- Chinese (Simplified and Traditional)
- Croatian
- Czech
- Finnish
- Greek
- Hungarian
- Icelandic
- Indonesian
- Latvian
- Lithuanian
- Polish
- Punjabi
- Romanian
- Russian
- Serbian
- Slovak
- Ukrainian
- Vietnamese

**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. Einstein-powered features, such as Call Summaries, don't support 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 insight creation setup flow lets you select your language of choice.

## Add Call Participants to Video Call Records with Ease

It's important to know who's on a call, who's speaking, and what the call is related to. Your sales teams can edit the listed participants on a video call to refer to a specific Salesforce record.

**Where:** This change applies to Einstein Conversation Insights in Lightning Experience. Einstein Conversation Insights is available in Enterprise, Performance and Unlimited editions, and as an add-on in Enterprise Edition for more than 10 users.

**Why:** Users can edit the participants listed on a video call by clicking the edit icon and relating speakers to a user, lead, or contact. They can also update individual speakers to assign a participant to a specific speaker track.

## Access Full Support for More Voice Providers

Einstein Conversation Insights has full support for 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. Visit AppExchange to add the new providers.

**Where:** This change applies to Einstein Conversation Insights in Lightning Experience. Einstein Conversation Insights is available in Enterprise, Performance and Unlimited editions, and as an add-on in Enterprise Edition for more than 10 users.

**How:** Visit [AppExchange](#) or [download the package directly](#) to enable the new voice providers with Einstein Conversation Insights.

A new version of the package is available in February 2024. If you're upgrading from a prior version, install the latest version, turn off the voice provider integration, then turn it back on to use the latest updates.

## Get 10 Einstein Conversation Insights Licenses with Enterprise Edition

Give your sales teams using Enterprise Edition insights about their customer calls and surface coachable moments. If you're using Sales Cloud Enterprise Edition, you can access 10 Einstein Conversation Insights licenses. Play recordings of conversations to gain visibility into mentions of competitors, products, custom keywords, pricing discussions, and next steps.

**Where:** This change applies to Einstein Conversation Insights in Lightning Experience. Einstein Conversation Insights is available in Enterprise, Performance and Unlimited editions, and as an add-on in Enterprise Edition for more than 10 users.

**When:** Most orgs can access the licenses in March, some orgs gain access in May 2024.

Einstein Conversation Insights is not supported in Government Cloud. Other [existing requirements](#) apply and may preclude access to the product.

**How:** Find the new Einstein Conversation Insights Standard licenses under Permission Sets in Setup. For more information about Einstein Conversation Insights features and setup, see [Set Up Einstein Conversation Insights](#) in Salesforce Help.

Each Einstein Conversation Insights Standard license includes up to 60 processed hours of calls per year per license.

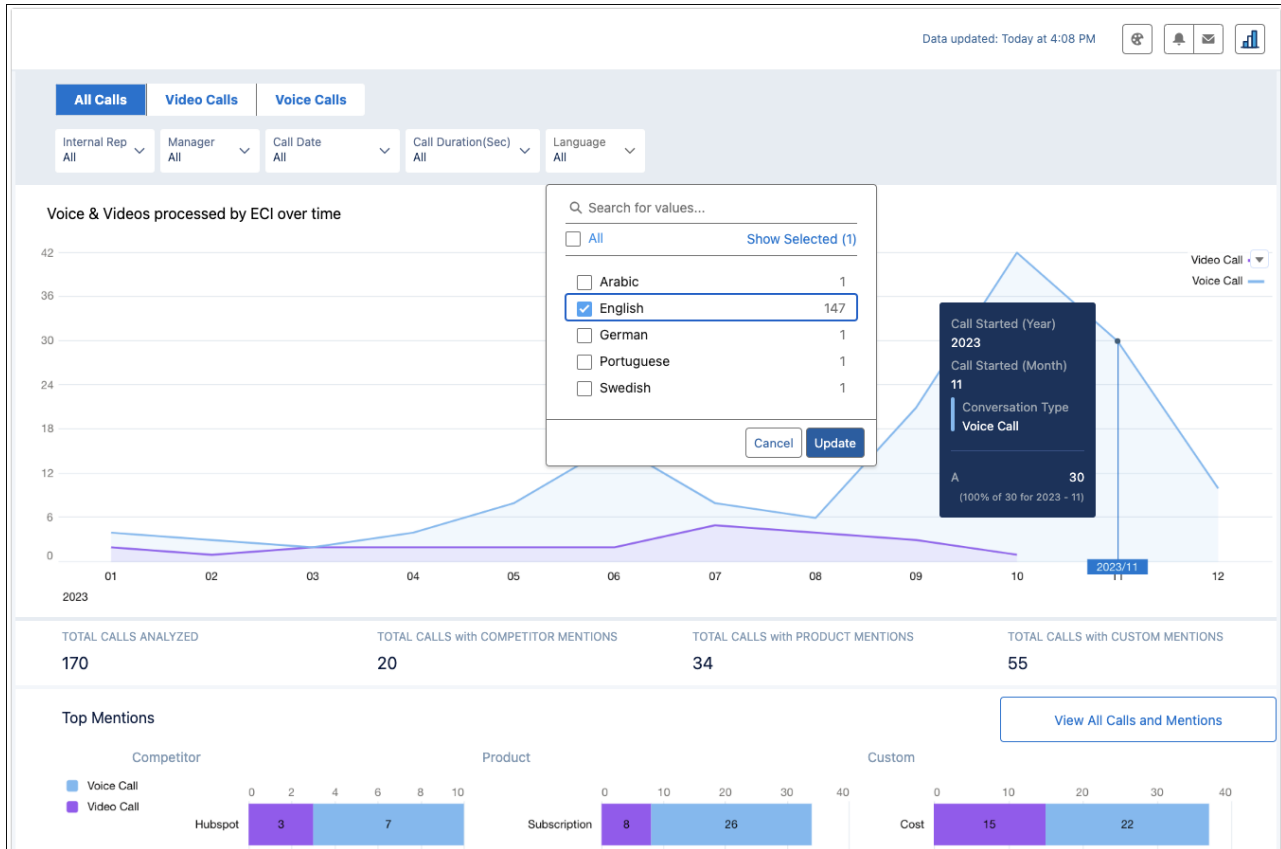
## Access Dashboard Improvements

Enhanced dashboard features are available to Einstein Conversation Insights (ECI) users. Filter by manager, call duration, language, and use a custom call date filter.

**Where:** This change applies to Einstein Conversation Insights in Lightning Experience. Einstein Conversation Insights is available in Enterprise, Performance and Unlimited editions, and as an add-on in Enterprise Edition for more than 10 users.

**Who:** This feature is now available to users with access to Einstein Conversation Insights.

**Why:** ECI users can access new features from the Conversation Insights dashboard. We've tweaked the list of available filters, adding new filters for manager, call duration, and language. The list of relevant calls has moved to the Calls and Mentions page, and the Amount column was removed from the list.



## Identify Speakers on Mono Calls

What's not to like about improved speaker matching? Einstein Conversation Insights can automatically identify the sales rep and customer on English mono calls, based on contextual factors in the text of the conversation.

**Where:** This change applies to Einstein Conversation Insights in Lightning Experience. Einstein Conversation Insights is available in Enterprise, Performance and Unlimited editions, and as an add-on in Enterprise Edition for more than 10 users.

**When:** This feature is available to users in March 2024.

**Why:** Mono calls can now use more features present in stereo calls, including separate speaker tracks and speaker identification in voice call records. This is done based on the text content of conversations and is not based on acoustic factors.

This feature is supported for sales-related voice calls in English that contain two speakers. Calls with fewer than five sentences are not supported.

## Get More Details About Errors

We improved the error handling for Einstein Conversation Insights (ECI) processing states. See more detailed information about an issue, such as whether a call was too short to process or a user didn't have access to ECI at the time a call was made.

**Where:** This change applies to Einstein Conversation Insights in Lightning Experience. Einstein Conversation Insights is available in Enterprise, Performance and Unlimited editions, and as an add-on in Enterprise Edition for more than 10 users.

## Sales Fundamentals

See a detailed overview of metrics, goals, suggestions, tasks, and activities in Seller Home. Plan for meetings with customers and prospects based on geographic locations directly on a map using Salesforce Maps Lite. See account activity, scan opportunity metrics, review cases, and log activities, all in one place in the Account Intelligence view. See which leads and contacts are engaging and view insights on the Lead and Contact Intelligence Views.

### [Drive Success with Seller Home](#)

Now Sales team members can start their day with a complete view of their business. Seller Home shows users an overview of their opportunities, accounts, leads, and contacts, along with their day's agenda. Seller Home also lets users set goals and track progress and view their to-do items, recent records, and contact suggestions from Einstein.

### [Visualize Customers and Prospects on a Map](#)

Keep reps focused on meeting and exceeding sales targets as they plan for in-person and virtual visits with accounts, contacts, and leads in key geographic areas with Salesforce Maps Lite. Identifying customers and prospects on a map helps your reps better plan their routes with fewer miles and set up appointments with fewer gaps in their schedules.

### [Leads](#)

See which leads are engaging and view insights on the Lead Intelligence View.

### [Accounts](#)

See account activity, scan opportunity metrics, view cases, and log activities, all in one place in the Account Intelligence view.

### [Contacts](#)

See which contacts are engaging and view insights on the Contact Intelligence View. Let Einstein do the work of finding potential contacts from your emails and events.

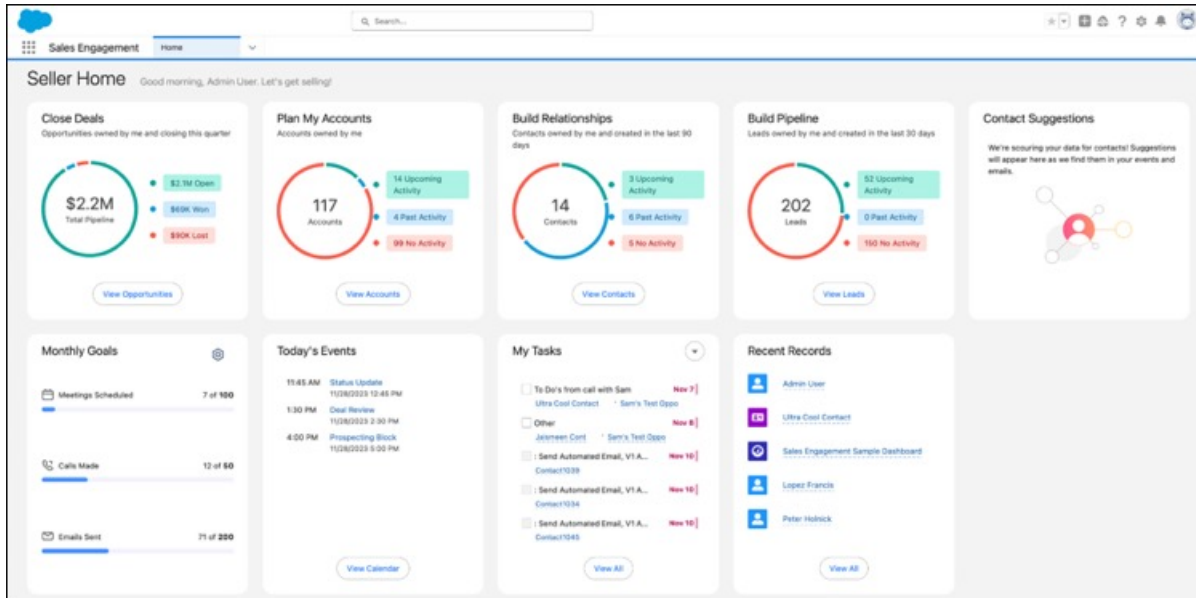
## Drive Success with Seller Home

Now Sales team members can start their day with a complete view of their business. Seller Home shows users an overview of their opportunities, accounts, leads, and contacts, along with their day's agenda. Seller Home also lets users set goals and track progress and view their to-do items, recent records, and contact suggestions from Einstein.

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

**Why:** With more useful information available at a glance, users can get oriented faster and choose what to do next. Seller Home includes:

- Opportunity overview
- Account overview
- Lead overview
- Contact overview
- Weekly or monthly goals
- Today's Events
- To-do items
- Recent Records
- Contact suggestions—identified by Einstein from a user's emails and events



**How:** Seller Home is the default My Home page for the Sales, Sales Console, and Sales Engagement apps. It appears automatically if you haven't applied a custom home page to these apps or as your org-wide default. If you've customized these pages, you can manually enable Seller Home from the Home item in Setup. Once enabled, select the App System Default as the Home page for the Sales, Sales Console, and Sales Engagement apps.

SEE ALSO:

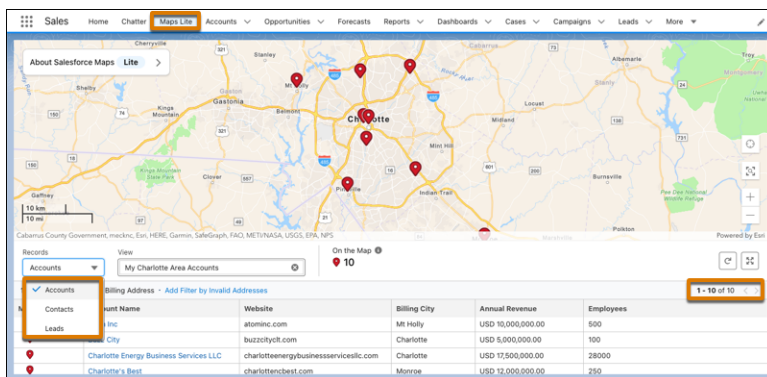
[Spend Less Time Finding New Contacts with Einstein Suggestions](#)

## Visualize Customers and Prospects on a Map

Keep reps focused on meeting and exceeding sales targets as they plan for in-person and virtual visits with accounts, contacts, and leads in key geographic areas with Salesforce Maps Lite. Identifying customers and prospects on a map helps your reps better plan their routes with fewer miles and set up appointments with fewer gaps in their schedules.

**Where:** This change applies to Lightning Experience in eligible Performance and Unlimited editions with Sales Cloud, Service Cloud, Industry Clouds, and Government Cloud Plus. Not available for customers complying with Hyperforce European Union Operating Zone data residency requirements. For eligibility requirements, contact your account executive.

**How:** From Maps and Location Settings in Setup, select the option that enables Maps Lite. Then, your sales reps can plot as many as 50 accounts, contacts, or leads simultaneously on the map from the Maps Lite tab.



Reps select from available objects and their list views, scroll the list of records, and load different records on the map when they advance through pages. If reps want to further grow their business using route and schedule optimizations, they can ask their managers for a full Salesforce Maps license.

SEE ALSO:

[Salesforce Help: Showing Customers and Prospects on a Map \(can be outdated or unavailable during release preview\)](#)

## Leads

See which leads are engaging and view insights on the Lead Intelligence View.

[See Which Leads are Engaging and View Insights](#)

Lead Intelligence View engagement metrics let sellers quickly see an overview of which leads are engaging and which need more attention. Insights include case insights, email insights, and Einstein Conversation Insights. And activity metrics now include events as well as tasks.

### See Which Leads are Engaging and View Insights

Lead Intelligence View engagement metrics let sellers quickly see an overview of which leads are engaging and which need more attention. Insights include case insights, email insights, and Einstein Conversation Insights. And activity metrics now include events as well as tasks.

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

**Why:** Lead engagement metrics include:

- Not contacted—No calls or emails occurred in the last year
- Contacted attempted—Outgoing calls or emails occurred in the last 30 days, without meaningful engagements
- Engaged—At least one inbound engagement occurred
- Meeting scheduled—At least one event is scheduled in the next 30 days
- Meeting declined—A scheduled event was declined
- Disqualified—The contact has a call result of unqualified or not interested, or has opted out of calls or emails



Name	Account Name	Last Activity	Last Activity Date	Next Activity Date	Today's Activities	Total Cadences
1 Ultra Cool Contact	Sam's Awesome Business Ac...	1/24/2023	1/24/2023, 12:00:00 PM		0	2 cadences
2 Tony Baker	Account 1	10/1/2023	1/10/2023, 12:00:00 PM		0	0 cadences
3 Test Lead	List Indemnity, Inc.	10/18/2023	1/10/2023, 1:35:23 PM		0	0 cadences
4 TestContact	Boston Atlantic	10/17/2023	10/17/2023, 4:58:49 PM		0	0 cadences
5 Test User	salesforce.com	1/20/2023	1/20/2023, 4:39:32 PM		0	0 cadences
6 Test User One	Lumenis Pipers LLC	10/06/2023	10/26/2023, 4:48:02 PM		0	0 cadences
7 Lu	SLW Wildan	1/13/2023	1/13/2023, 2:14:47 PM		0	0 cadences
8 Pigeon? release2	Pigeon? acout	1/15/2023	1/28/2023, 11:30:00 AM		12	0 cadences
9 Leo Branch	Account115	1/28/2023	1/28/2023, 1:29:53 PM		1	0 cadences
10 John Kula	John Kula				0	1 cadences
11 Joe Smith	Account 1	10/17/2023	10/17/2023, 5:30:00 PM		0	0 cadences
12 Jim Doherty	Crescent Machine Inc.				0	0 cadences

**How:** Turn on **Lead Intelligence View** in Lead Intelligence View Setup. If you have customized the Lead List View button layout, add the Intelligence View button to the layout. If you haven't customized the layout, the button appears automatically.

To view engagement metrics, enable Email Tracking in the Inbox section of Sales Engagement Setup.

To see the Intelligence View, users go to the Lead home page and click **Intelligence View**. To view engagement metrics, choose **Engagement Metrics** from the Metrics menu.

To view insights, open the side panel using the icon next to the lead name. Insights appear in the Insights tab when they're available.

To return to the original list view, users can click **List View**. New Salesforce organizations include the Lead Intelligence View on the home page by default.

## Accounts

See account activity, scan opportunity metrics, view cases, and log activities, all in one place in the Account Intelligence view.

### [Get a Full View of Account Health with the Account Intelligence View](#)

See account activity, scan opportunity metrics, review cases, and log activities, all in one place in the Account Intelligence view. Previously, the account home page provided only a simple list view and required users to navigate to individual records to view opportunity, activity, or case data.

### Get a Full View of Account Health with the Account Intelligence View

See account activity, scan opportunity metrics, review cases, and log activities, all in one place in the Account Intelligence view. Previously, the account home page provided only a simple list view and required users to navigate to individual records to view opportunity, activity, or case data.

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

**When:** This feature is available in production on a rolling basis after the Spring '24 release is complete and is available to all customers by March 5, 2024. To see the feature in sandboxes, run Match Production Licenses or request a refresh after the feature is available in production.

**Why:** The Account Intelligence view is your dedicated workspace for account management.

Account Name	Open Opportunities	Next Close Date	Type	Last Activity
Caryn Dawn Comacchio	\$6,521.31	7/31/2023	Prospect	10/6/2023
NewLink BancSystem	\$1,529,787.85	10/12/2023	Other	10/6/2023
Cyanotech Stratasys Inc.	\$1,685,763.00	10/8/2023	Customer	10/8/2023
Willis Bastedo	\$35,479.46	10/11/2023	Partner	10/11/2023
Joseph P Potoski	\$1,692,069.00	10/12/2023	Competitor	10/13/2023
Karen S Soules	\$1,625,733.00	9/26/2023	Reseller	10/14/2023
Yasha Cabute	\$59,145.85	9/23/2023	Competitor	10/17/2023
Jacqj Whannel	\$1,696,543.00	9/27/2023	Press	10/18/2023
Stadies Repligen LLC	\$0.00		Prospect	10/22/2023

In the Account Intelligence view, you can quickly filter accounts (1) and see statistics, such as the total value of open opportunities and next close date, for resulting records (2). To see detailed activity, opportunity, and case data for individual records, click the side panel icon (3) next to the record name. In the side panel, toggle between panes showing activity data or related records (4) or log activity (5) without leaving the Intelligence view.

**How:** To see the Account Intelligence view, go to the account home page and click **Intelligence View**. To return to the original list view, click **List View**. New Salesforce customers have the Account Intelligence View on the account home page by default.

SEE ALSO:

[Salesforce Help: Push Updated Licenses to Sandbox Orgs \(can be outdated or unavailable during release preview\)](#)

## Contacts

See which contacts are engaging and view insights on the Contact Intelligence View. Let Einstein do the work of finding potential contacts from your emails and events.

[See Which Contacts are Engaging and View Insights](#)

Contact Intelligence View engagement metrics let sellers quickly see an overview of which contacts are engaging and which need more attention. Insights include case insights, email insights, and Einstein Conversation Insights. And activity metrics now include events as well as tasks.

[Spend Less Time Finding New Contacts with Einstein Suggestions](#)

In the Contact Suggestions area on your Seller Home page, Einstein lists potential contacts from your email and event activity. You can add a suggested contact, see an activity timeline for context, or remove Einstein's suggestion.

## See Which Contacts are Engaging and View Insights

Contact Intelligence View engagement metrics let sellers quickly see an overview of which contacts are engaging and which need more attention. Insights include case insights, email insights, and Einstein Conversation Insights. And activity metrics now include events as well as tasks.

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

**Why:** Engagement metrics include:

- Not contacted—No calls or emails occurred in the last year
- Contacted attempted—Outgoing calls or emails occurred in the last 30 days, without meaningful engagements
- Engaged—At least one inbound engagement occurred
- Meeting scheduled—At least one event is scheduled in the next 30 days
- Meeting declined—A scheduled event was declined
- Disqualified—The contact has a call result of unqualified or not interested, or has opted out of calls or emails

Name	Account Name	Last Activity	Last Activity Date	Next Activity Date	Today's Activities	Total Cadences	Account Type
1 Ultra Cool Contact	Sam's Awesome Business Ac...		1/24/2023, 12:00:00 PM		0	2 cadences	App
2 Tony Baker	Account 1		10/1/2023, 12:00:00 PM		0	0 cadences	App
3 TestH Lavan	Test Indemnity Inc.		10/18/2023, 1:35:23 PM		0	0 cadences	Cha
4 TestContact	Boston Atlanticus		10/17/2023, 4:58:49 PM		0	0 cadences	Bar
5 Test User	salesforce.com		1/20/2023, 4:39:32 PM		0	0 cadences	Tex
6 Test c/o One	Lumens Pizza LLC		10/26/2023, 4:48:02 PM		0	0 cadences	Com
7 Lo	DLH Wilson		1/3/2023, 2:16:47 PM		0	0 cadences	Head
8 Pgauch? relandQ	Pgauch? acct		1/16/2023, 11:30:00 AM		12	0 cadences	Head
9 Leo Branch	Account115		1/28/2023, 1:29:53 PM		1	0 cadences	Head
10 John Kula	John Kula				0	1 cadences	Head
11 Joe Smith	Account 1		10/17/2023, 6:30:00 PM		0	0 cadences	Head
12 Jim Orlin	Chesed Mackinnac Inc.				0	0 cadences	Fin

**How:** Turn on **Contact Intelligence View** in Contact Intelligence View Setup. If you have customized the Contact List View button layout, add the Intelligence View button to the layout. If you haven't customized the layout, the button appears automatically.

To view engagement metrics, enable Email Tracking in the Inbox section of Sales Engagement Setup.

To see the Intelligence View, users go to the Contact home page and click **Intelligence View**. To view engagement metrics, choose **Engagement Metrics** from the Metrics menu.

To view insights, open the side panel using the icon next to the lead name. Insights appear in the Insights tab when they're available.

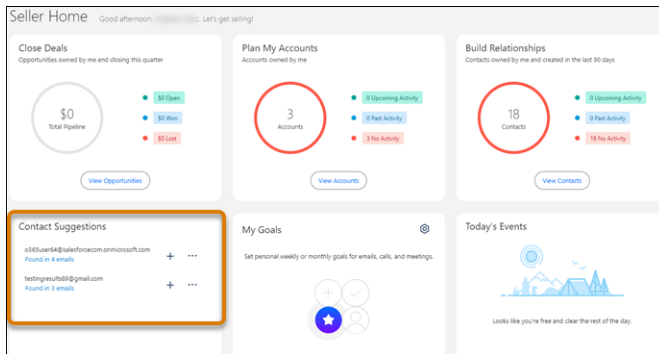
To return to the original list view, users can click **List View**. New Salesforce organizations include the Contact Intelligence View on the home page by default.

## Spend Less Time Finding New Contacts with Einstein Suggestions

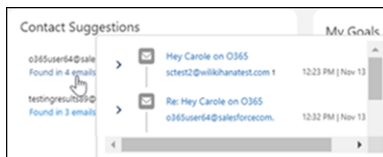
In the Contact Suggestions area on your Seller Home page, Einstein lists potential contacts from your email and event activity. You can add a suggested contact, see an activity timeline for context, or remove Einstein's suggestion.

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

**How:** Seller Home is the default Home page for the Sales, Sales Console, and Sales Engagement apps. In the Contact Suggestions area, the + and ... buttons let you add the contact or remove the suggestion.



See the activity from which Einstein suggested the potential contact by clicking the **Found in** link.



SEE ALSO:

[Einstein Features](#)

[Drive Success with Seller Home](#)

[Salesforce Help: Considerations for Creating Contacts \(can be outdated or unavailable during release preview\)](#)

## Sales Engagement

Build responsive cadences in less time with less complexity with Cadence Builder 2.0 and create call scripts and email templates while adding a quick cadence.

For pricing details, contact your Salesforce account executive. Sales Dialer is also available for an extra cost as an add-on license.

[Create Responsive Cadences Faster with Cadence Builder 2.0](#)

Cadence creators can now build standard cadences sensitive to target engagement with much less effort and complexity. Creators use only three tracks—neutral, positive, and negative—to hold cadence steps appropriate to different target responses. Entry rules for each track let targets move to the appropriate track based on their responses, whenever they occur. Previously, relatively simple branching scenarios based on target response often required large numbers of redundant steps after each branch.

[Save Time by Creating Call Scripts and Email Templates with Quick Cadences](#)

When users create a quick cadence, they can now create a call script or email template directly within the quick cadence creation window. Previously, users had to create call scripts and email templates before adding them to a quick cadence.

## Create Responsive Cadences Faster with Cadence Builder 2.0

Cadence creators can now build standard cadences sensitive to target engagement with much less effort and complexity. Creators use only three tracks—neutral, positive, and negative—to hold cadence steps appropriate to different target responses. Entry rules for each track let targets move to the appropriate track based on their responses, whenever they occur. Previously, relatively simple branching scenarios based on target response often required large numbers of redundant steps after each branch.

**Where:** This change applies to Lightning Experience in Performance, Unlimited Editions, Professional, and Enterprise Editions with Sales Cloud.

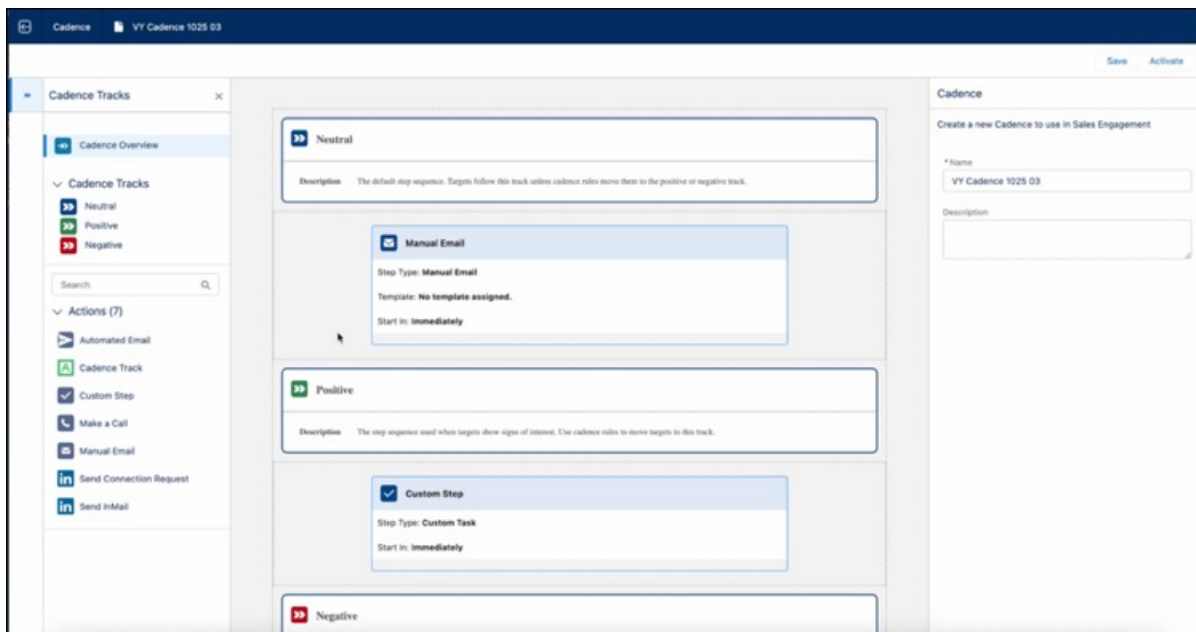
**Who:** Cadence Builder is available to users with the Sales Engagement Cadence Creator or Sales Engagement Cadence Creator Included permissions.

**Why:** Cadence creators can build cadences with separate tracks, or series of steps, for targets of different levels of interest or engagement.

- A neutral track, usually with steps for targets who have not yet engaged
- A positive track for targets who have engaged or shown interest
- A negative track for targets that have expressed a lack of interest

The builder canvas lets you see the steps in each track, drag steps to and from a track, and configure step details all in one view.

Cadence creators can use each track in the way that makes sense for their team and can set rules to control when a target moves from one track to another. Targets can move from track to track at any time based on the track entry rules. For example, the positive track can have an entry rule that moves a target to that track when they click a link in an email sent in a previous step.



**How:** Users can choose between Cadence Builder 2.0 and Cadence Builder Classic when first creating a cadence. Cadence authors create steps and cadence exit rules in the same way in Cadence Builder 2.0 and Cadence Builder Classic. Cadence Builder 2.0 doesn't support cadence autolaunched flows or screen flow steps.

## Save Time by Creating Call Scripts and Email Templates with Quick Cadences

When users create a quick cadence, they can now create a call script or email template directly within the quick cadence creation window. Previously, users had to create call scripts and email templates before adding them to a quick cadence.

**Where:** This change applies to Lightning Experience in Enterprise and Professional editions with the Sales Cloud.

**Who:** Quick cadences are available to users with the Sales Engagement Cadence Creator or Sales Engagement Quick Cadence Creator permission.

**Why:** Users can choose to create a call script or email template right from the dropdown list.

**New Quick Cadence**

**Make a Call**

\* Name  
  
 Complete this field.

Description

Call Script  
 Call Script Search call scripts...

\* Start This Quick Call  
 Immediately After

\* Due Date  
 Date Cadence is

\* Repeat  
 Don't Repeat

+ New Call Script

**Add an Automated Action?**  
 When you're finished here, you can automate adding targets to this cadence.

Add Automated Action

## Revenue Intelligence

Try the updated Revenue Insights setup for a more intuitive experience, a simplified workflow, and more robust error messages. You can now go to one place to manage your apps and all the tasks associated with your apps. Dive into the details of your pipeline using Stage Conversion analysis.

### [Perform a Deep Analysis of Win Rates and Pipeline Bottlenecks](#)

Dive into the details of your pipeline using Stage Conversion analysis on the Sales Stage Analysis dashboard. You can answer questions such as what percentage of the pipeline progressed beyond each stage in a time period. You can also see what percentage of pipeline progressed to close from this stage on the same day of this last period.

### [Manage Your App Installation and Refreshes in One Place](#)

You can now go to one place to manage your apps and all the tasks associated with your apps. You can manage app installs, view logs, reconfigure, or refresh apps. And, when you install an app, you can understand quickly whether the installation was successful and troubleshoot any installation errors. Previously, these functions were located in different places.

### [Make Installing Revenue Insights a Breeze](#)

Try the updated Revenue Insights setup for a more intuitive experience, a simplified workflow, and more robust error messages.

## Perform a Deep Analysis of Win Rates and Pipeline Bottlenecks

Dive into the details of your pipeline using Stage Conversion analysis on the Sales Stage Analysis dashboard. You can answer questions such as what percentage of the pipeline progressed beyond each stage in a time period. You can also see what percentage of pipeline progressed to close from this stage on the same day of this last period.

**Where:** This change applies to Revenue Intelligence in Sales Cloud in Lightning Experience in Enterprise and Unlimited editions for an additional cost.

**How:** From the Setup menu, search for Revenue Intelligence. In the Revenue Intelligence setup menu follow the updated setup menu to configure prerequisites and Revenue Insights. Open the Stage Conversion tab from the Sales Stage Analysis dashboard.

## Manage Your App Installation and Refreshes in One Place

You can now go to one place to manage your apps and all the tasks associated with your apps. You can manage app installs, view logs, reconfigure, or refresh apps. And, when you install an app, you can understand quickly whether the installation was successful and troubleshoot any installation errors. Previously, these functions were located in different places.

**Where:** This change applies to Revenue Intelligence in Sales Cloud in Lightning Experience in Enterprise and Unlimited editions for an additional cost.

**How:** From the Setup menu, search for Revenue Intelligence. In the Revenue Intelligence setup menu, installed versions of Revenue Intelligence display. You can view details about the app installation, including each task's success or failure; schedule app refreshes, or reinstall the app instantly from the menu.

## Make Installing Revenue Insights a Breeze

Try the updated Revenue Insights setup for a more intuitive experience, a simplified workflow, and more robust error messages.

**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 the Revenue Intelligence dashboards, you need the Revenue Intelligence User permission set. To manage the Revenue Intelligence dashboards, you need the Revenue Intelligence Admin permission set.

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

## Pipeline Inspection

Enjoy a more responsive Pipeline Inspection UI. Add filter logic to create more targeted lists of deals. The record limit is increased to 2,000 for all metrics, views, and charts in Pipeline Inspection.

### [IdeaExchange Delivered: Get More in Pipeline Inspection with Increased Record Limits in Charts and Views](#)

All metrics, list views, and charts now have a 2,000 record limit. Previously, the flow chart and some metrics in the pipeline changes metrics group had a 1,000 record limit, while the waterfall chart and forecast category metrics had a 2,000 record limit. This change greatly expands your sales teams' ability to manage more deals and view wider time periods. We delivered this feature thanks to your ideas on IdeaExchange.

### [Narrow In on Deals with Filter Logic in Pipeline Inspection](#)

Sales reps can now create a more targeted list of deals by applying filter logic in the Pipeline Inspection filter panel. Previously, only the records that matched all specified filter criteria were shown in the results.

### [IdeaExchange Delivered: Get a More Flexible Pipeline Inspection UI](#)

Users get an improved experience with a more responsive Pipeline Inspection UI. As you resize your screen, the metrics and quick filters now scale down accordingly and move into overflow menus as needed. You see your metrics and pipeline list view without the metrics area taking over the screen. Users can also resize the areas of the chart screen. We delivered this feature thanks to your ideas on IdeaExchange.



## Get More in Pipeline Inspection with Increased Record Limits in Charts and Views

All metrics, list views, and charts now have a 2,000 record limit. Previously, the flow chart and some metrics in the pipeline changes metrics group had a 1,000 record limit, while the waterfall chart and forecast category metrics had a 2,000 record limit. This change greatly expands your sales teams' ability to manage more deals and view wider time periods. We delivered this feature thanks to your ideas on IdeaExchange.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions with Sales Cloud.

SEE ALSO:

[Salesforce Help: Guidelines and Limits for Pipeline Inspection \(can be outdated or unavailable during release preview\)](#)

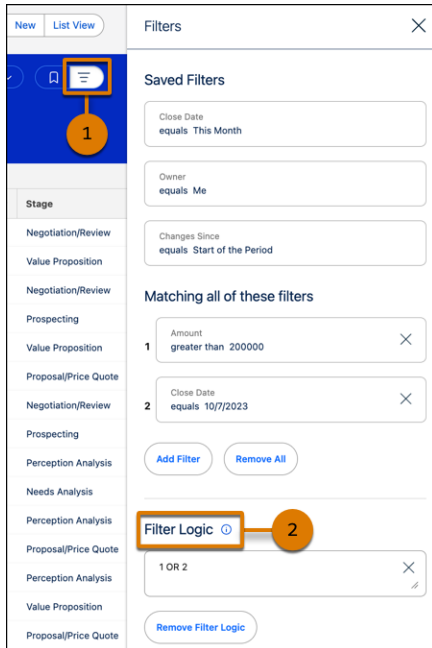
## Narrow In on Deals with Filter Logic in Pipeline Inspection

Sales reps can now create a more targeted list of deals by applying filter logic in the Pipeline Inspection filter panel. Previously, only the records that matched all specified filter criteria were shown in the results.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions with Sales Cloud.

**How:** In the filter panel (1), add filter logic to the Filter Logic field (2) and save. Users can define custom filter logic with filter conditions using parentheses and the AND, NOT, and OR operators.





## SEE ALSO:

[Salesforce Help: Guidelines and Limits for Pipeline Inspection \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Add Filter Logic \(can be outdated or unavailable during release preview\)](#)

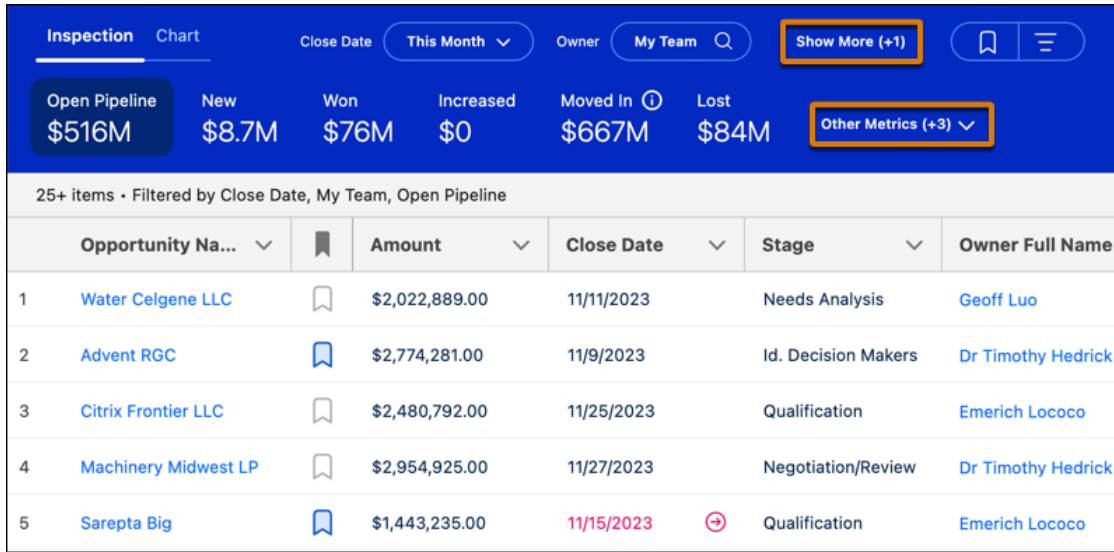


## Get a More Flexible Pipeline Inspection UI

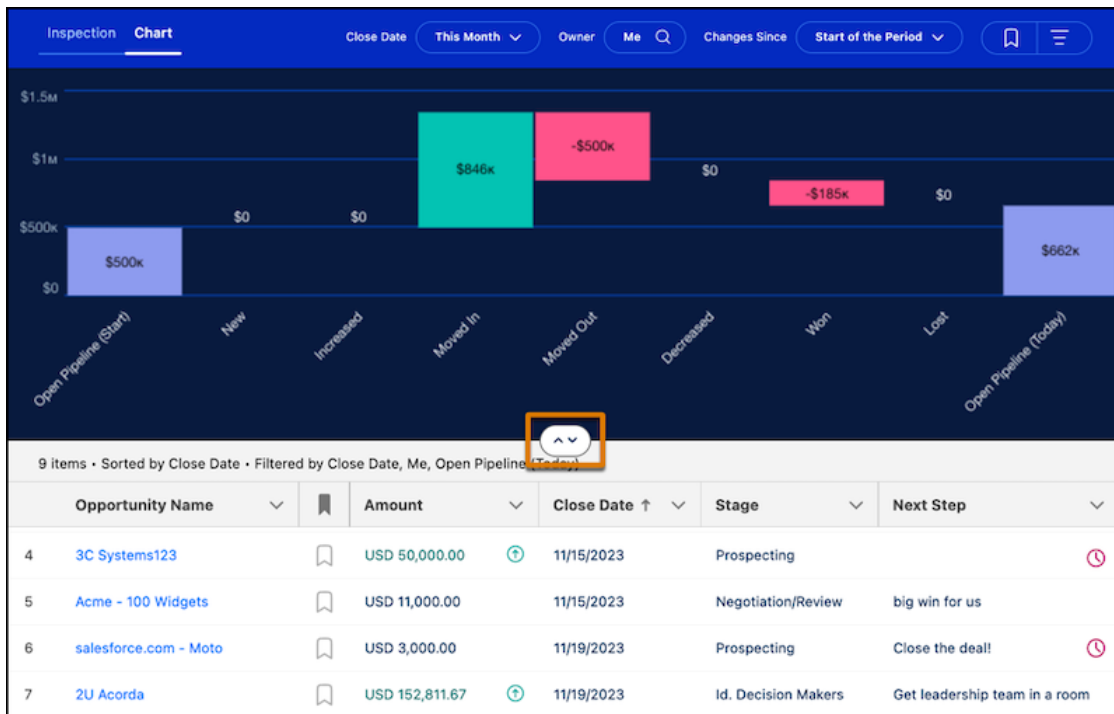
Users get an improved experience with a more responsive Pipeline Inspection UI. As you resize your screen, the metrics and quick filters now scale down accordingly and move into overflow menus as needed. You see your metrics and pipeline list view without the metrics area taking over the screen. Users can also resize the areas of the chart screen. We delivered this feature thanks to your ideas on IdeaExchange.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions with Sales Cloud.

**How:** As you change the width or size of your screen, the metrics flow into dropdown menus so that you keep your pipeline list view.



On the chart tab, you can also resize the chart or list areas by using the arrows.



## Collaborative Forecasts

Group forecasts into segments that make sense for your business. Easily evaluate adjusted forecasts with adjustment values in separate columns on the forecasts page. Quickly access different forecast views using tabs. And gain more insight into forecasts with forecast chart enhancements and added custom report types.

### View and Set Forecasts with Forecast Groups

Forecast the way you do business by grouping forecasts into segments that make sense for your business. For example, define forecasts that are grouped into specific industries or sale types. Creating your own forecast groups gives your forecast managers more flexibility to review and predict future sales. Forecast groups are available for forecast types created in Spring '24 or later and that are based on the Opportunity and Opportunity Product objects. You can continue to group forecasts by product family.

### Gain Forecast Clarity with Side-by-Side Adjustment Details

For a complete picture of adjusted forecasts, show adjustment values in separate columns on the forecasts page versus only in a hover window. Showing the original rolled up values before any adjustments and after team and manager adjustments in separate columns provides the visibility needed to make an accurate forecast. Previously, users could only find adjustment details when hovering over a forecast total, with no side-by-side view.

### Access Different Forecast Views in Tabs

If you have multiple active forecast types, forecast users can now quickly access different forecast views using tabs on the forecast page, making forecast information more readily available. Forecast users can also select to show only the forecasts that apply to their work. Previously, to view a different forecast, users selected a different forecast type from the gear icon dropdown menu.

### Gain Deeper Insights About Forecast Health with Forecast Chart Enhancements

Get more from the Forecast Changes chart and Historical Trends with visualizations by product family or other forecast groups and with added data summary tables. To give forecast users easier access, we also changed how to switch between chart types and updated how users select to show values with or without adjustments.

### Unlock More Details and Spot Trends with More Forecasting Custom Report Types

Make strategic decisions about your forecasts by creating report types that include external custom column data or information about opportunity product splits forecasts. These report options help sales leaders review forecast trends and increase forecast accuracy.

### Round Forecast Amounts for More Streamlined Forecasts

As of early October 2023, forecast users can choose to show forecast amounts in the forecast summary without decimal places and rounded to the nearest whole number. Rounding forecast amounts can free up valuable real estate and provide a more streamlined view into forecast totals.

## View and Set Forecasts with Forecast Groups

Forecast the way you do business by grouping forecasts into segments that make sense for your business. For example, define forecasts that are grouped into specific industries or sale types. Creating your own forecast groups gives your forecast managers more flexibility to review and predict future sales. Forecast groups are available for forecast types created in Spring '24 or later and that are based on the Opportunity and Opportunity Product objects. You can continue to group forecasts by product family.

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

**Why:** When forecast users view a forecast type that uses groups, they see forecast totals grouped by the values you selected in the forecast type.

PERIOD	Closed	Commit	Most Likely	Best Case	Open Pipeline
November FY 2023 <span>Current</span>	USD 556,345	USD 556,345	USD 556,345	USD 556,345	USD 114,000
> Add-On Business	USD 0	USD 0	USD 0	USD 0	USD 3,000 ⓘ
> New Business	USD 845	USD 845	USD 845	USD 845	USD 111,000 ⓘ
> Renewals Business	USD 555,500	USD 555,500	USD 555,500	USD 555,500 ⓘ	USD 0

Users can also filter forecast charts by the group values available in the forecast type and include group value selections in forecast reports.

**How:** Depending on which object you use for forecasts, add custom single-selection picklist fields that represent the groups to the Opportunity, Opportunity Product, or Product objects. Ensure the picklist is available on the object page layout that your sales reps and forecast managers use.

In Setup, open Forecast Settings, and then create a forecast type based on the Opportunity or Opportunity Product object. In the setup flow, select to group by the custom picklist that you defined. Then, select the values within that picklist to include in the forecast type. You can select up to 50 values from the custom picklist to include in the forecast.

The screenshot shows the 'Create a Forecast Type' setup flow. It is divided into two main sections: 'Specify a measure' and 'Select group values'. In the 'Specify a measure' section, 'Amount' is selected as the measure. In the 'Select group values' section, 'BusinessType (Opportunity.BusinessType\_\_c)' is selected as the group by field. The 'Available Values' list contains 'Existing Business' and 'Not Categorized'. The 'Selected Values' list contains 'Add-On Business', 'New Business', and 'Renewals Business'. A search bar is present above the 'Available Values' list. At the bottom, there are 'Back' and 'Next' buttons, along with a progress indicator.

To change the selected group values after saving the forecast type, use the Edit Group Values option in the forecast type's quick action menu in Forecasts Settings.

SEE ALSO:

[Salesforce Help: Group Sales Forecasts to Match Your Business \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Forecast Types in Collaborative Forecasts \(can be outdated or unavailable during release preview\)](#)

## Gain Forecast Clarity with Side-by-Side Adjustment Details

For a complete picture of adjusted forecasts, show adjustment values in separate columns on the forecasts page versus only in a hover window. Showing the original rolled up values before any adjustments and after team and manager adjustments in separate columns provides the visibility needed to make an accurate forecast. Previously, users could only find adjustment details when hovering over a forecast total, with no side-by-side view.

**Where:** This change applies to Lightning Experience in Professional and Developer editions and in Enterprise and Unlimited editions with the Sales Cloud.

**Why:** Seeing adjusted forecast values side by side is beneficial when forecast users are determining and discussing their own adjusted forecast amount. When adjustments are shown in columns, each adjustable category shows:

- A column with the original forecast value before any adjustments
- If owner adjustments are enabled, a column with the forecast user's direct reports' adjustments
- A column with the forecast users own adjustments

Forecast users can expand and collapse each forecast category to show and hide the adjustment columns on the page.

Months	Closed	Without Adjustment	Team Adjustment	<<	My Commit
<b>Total:</b> 6 Months	USD 166,733,044	USD 268,354,286	USD 268,354,286		USD 268,354,286
> November FY 2023 <span>Current</span>	USD 75,700,151	USD 104,713,622	USD 104,713,622		USD 104,713,622
> December FY 2023	USD 50,914,876	USD 111,896,400	USD 111,896,400		USD 111,896,400
> January FY 2024	USD 38,852,914	USD 49,643,425	USD 49,643,425		USD 49,643,425
> February FY 2024	USD 717,186	USD 916,620	USD 916,620		USD 916,620

Notes about an adjustment are viewable when users hover over the column.

### How:

#### Enable Adjustments and Judgments

Allow adjustments to forecast rollup totals and judgments about an opportunity's likelihood to close this forecast period. These forecast edits don't affect the data in the related opportunities.

- Manager adjustments  
Managers can adjust forecasts for users and child territories one level below them in forecasts hierarchy.
- Owner adjustments  
Users can adjust the forecasts they own, including territory forecasts.

**Display Adjustments As**  
Show adjustments when hovering over a forecast cell, or as separate columns for each adjustable forecast category.

Hover  
 Columns 1

Forecast Category	Column Name	Description
1 Commit	My Commit	The forecast user's adjusted Commit forecast.
2 Commit	Without Adjustment	The original forecast amount before any adjustments.
3 Commit	Team Adjustment	The forecast manager's direct reports' adjusted Commit forecast.
4 Most Likely	My Most Likely	The forecast user's adjusted Most Likely forecast.
5 Most Likely	Without Adjustment	The original forecast amount before any adjustments.
6 Most Likely	Team Adjustment	The forecast manager's direct reports' adjusted Most Likely forecast.
7 Best Case	My Best Case	The forecast user's adjusted Best Case forecast.
8 Best Case	Without Adjustment	The original forecast amount before any adjustments.
9 Best Case	Team Adjustment	The forecast manager's direct reports' adjusted Best Case forecast.

From the Forecast Settings page in Setup, ensure that at least 1 adjustment option is selected in the Enable Manager Adjustments and Judgments section. Select to show the adjustments as columns (1). Then, if needed, change the names of the added columns to fit your business process (2). For example, change the My Commit column name to My Call Number. The setting and the column names apply to all forecast types.

No adjustment data is lost if you change how to show adjustments.

### SEE ALSO:

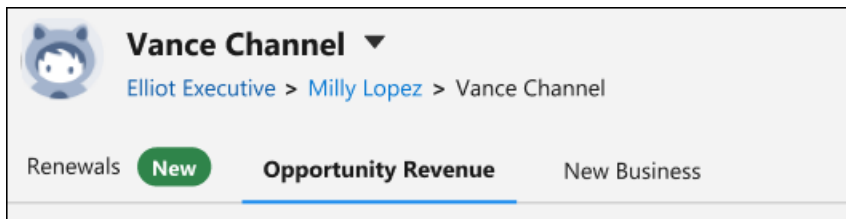
[Salesforce Help: Allow Forecast Adjustments and Manager Judgments in Collaborative Forecasts \(can be outdated or unavailable during release preview\)](#)

## Access Different Forecast Views in Tabs

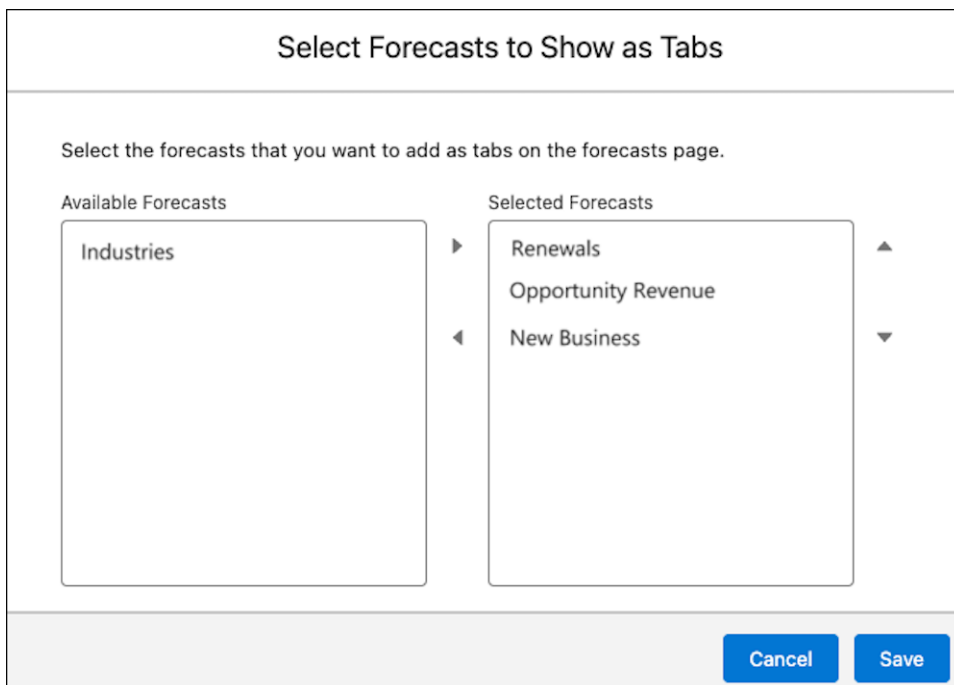
If you have multiple active forecast types, forecast users can now quickly access different forecast views using tabs on the forecast page, making forecast information more readily available. Forecast users can also select to show only the forecasts that apply to their work. Previously, to view a different forecast, users selected a different forecast type from the gear icon dropdown menu.

**Where:** This change applies to Lightning Experience in Professional and Developer editions and in Enterprise and Unlimited editions with the Sales Cloud.

**Why:** On the forecasts page, the active forecast types are shown as tabs within the forecast header.



From the gear icon on the forecasts page, choose Edit Tab Selections to filter which forecasts are shown as tabs and in what order they appear.



Any forecast types that are activated after a forecast user makes their selections are added to the forecast header and indicated as new. Forecast users can edit their selections again.

The Salesforce mobile app shows only the forecasts selected to show as tabs.

SEE ALSO:

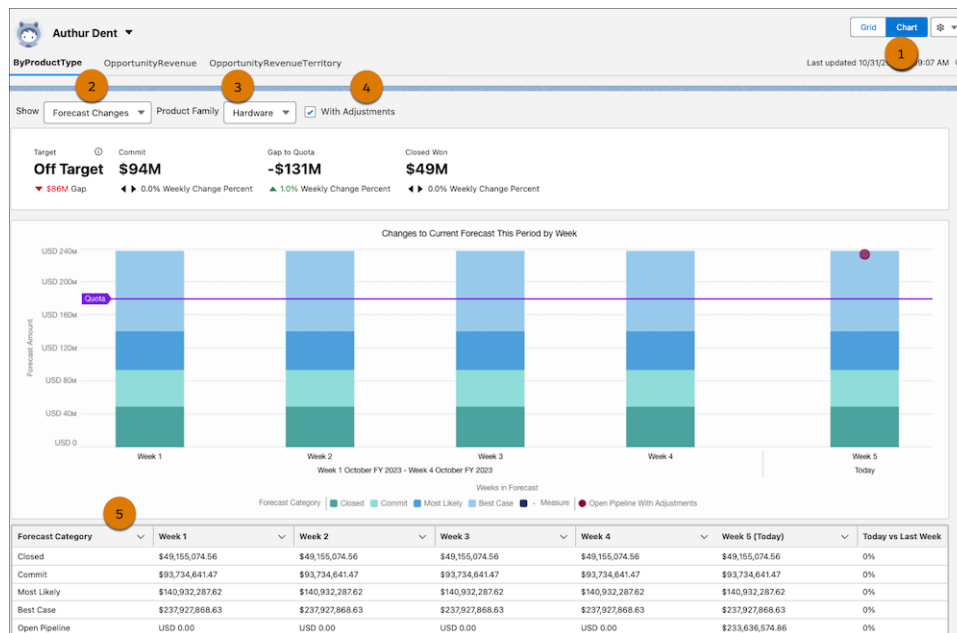
[Salesforce Help: View Sales Forecasts from Different Perspectives \(can be outdated or unavailable during release preview\)](#)

## Gain Deeper Insights About Forecast Health with Forecast Chart Enhancements

Get more from the Forecast Changes chart and Historical Trends with visualizations by product family or other forecast groups and with added data summary tables. To give forecast users easier access, we also changed how to switch between chart types and updated how users select to show values with or without adjustments.

**Where:** These changes apply to Lightning Experience in Enterprise and Unlimited editions with the Sales Cloud.

**Why:**



From any forecast tab selected on the forecasts page, you still click Charts to open the charts view (1). Then, select which chart to show from a dropdown (2). For forecasts grouped by product family or custom picklist, select to show data only for a specific product family or group value (3). Choose whether to show the data in the chart with adjustments or without to show the original rollup values before any adjustments were made (4). See the chart's data in table form in the summary data table following the chart (5). To jump to the corresponding data in the table, select any segment in the chart.

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

## Unlock More Details and Spot Trends with More Forecasting Custom Report Types

Make strategic decisions about your forecasts by creating report types that include external custom column data or information about opportunity product splits forecasts. These report options help sales leaders review forecast trends and increase forecast accuracy.

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

SEE ALSO:

[Salesforce Help: Preparing Sales Leaders to Report on Forecasts \(can be outdated or unavailable during release preview\)](#)

## Round Forecast Amounts for More Streamlined Forecasts

As of early October 2023, forecast users can choose to show forecast amounts in the forecast summary without decimal places and rounded to the nearest whole number. Rounding forecast amounts can free up valuable real estate and provide a more streamlined view into forecast totals.

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

**How:** On the forecasts page, from the Display Settings menu, select **Show Rounded Amounts**. All amounts in the forecast summary grid, including amounts in custom calculated columns, are rounded to the nearest whole number. Full amounts that include the decimal places are still shown when viewing adjustment and change details.

Full amounts that include the decimal places are also still shown in the opportunity list header, and in amounts shown for each opportunity in the opportunity list.

## Enablement and Guidance

Deliver enablement programs focused on improving revenue outcomes, driving business growth, and growing a community of engaged and inspired users. Bring curated resources related to your products, services, and processes to users where they work. Elevate business-critical job performance, develop in-demand skills, and provide timely, contextual onboarding, training, and coaching.

### [Enablement](#)

Drive revenue growth, achieve business outcomes, and reach measurable milestones. Roll out Enablement programs to more users and solve more use cases, from sales plays in Lightning Experience to business growth in Partner Relationship Management (PRM) experiences. Provide more insights, clarity, and control to users as they complete programs. And if you're not using Enablement yet but you like what you hear, try programs for free.

### [Guidance Center and In-App Guidance](#)

Start using the new domain for Setup pages with prompts and walkthroughs you create in Lightning Experience. Align your permissions governance strategy for Enablement programs and in-app guidance.

## Enablement

Drive revenue growth, achieve business outcomes, and reach measurable milestones. Roll out Enablement programs to more users and solve more use cases, from sales plays in Lightning Experience to business growth in Partner Relationship Management (PRM) experiences. Provide more insights, clarity, and control to users as they complete programs. And if you're not using Enablement yet but you like what you hear, try programs for free.

### [Build a Community of Loyal Partners with Partner Enablement Programs and In-App Guidance](#)

Drive business growth and cultivate brand loyalty by helping your company's partners ramp up quickly on your products, processes, and services. Deliver Enablement programs, prompts, and walkthroughs to partner users in your Partner Relationship Management (PRM) site where partners are working and interacting with your brand. Identify business outcomes you want partners to achieve and track their progress and performance with prebuilt analytics dedicated to Partner Enablement programs. Keep partners engaged with content and experiences that help them onboard, discover, level up, and ultimately grow your business. Collectively, this functionality is also called partner tracks.



### [Expand Your Enablement Strategy to More Users with Program Self-Enrollment](#)

Quickly scale your Enablement rollout to more users across all your company's experiences. Sales reps in Lightning Experience and partner users in supported Digital Experiences sites can self-enroll in selected programs that you share. Self-enrolled programs mostly behave the same as programs that an Enablement admin assigns and can include the same outcomes, milestones, exercises, and due dates.

### [Assign Offline Tasks to Your Sales Reps in Enablement Programs](#)

Provide a complete representation of all the offline activities that your sales reps perform during the course of an Enablement program. With the Action Item exercise type in your program, create tasks that your sales reps can complete away from their computers. You can include in-person tasks or to-dos in the exercise, such as visiting an office, catching up with the team, or having coffee with a manager.

### [Refresh Program Progress at Your Convenience](#)

Enablement users can now enjoy more timely insights into their program progress. Users can manually refresh their progress to see the outcome and milestone updates while taking a program. The progress updates provide an immediate validation that users are completing program goals successfully and help them plan the next goal with more confidence. Outcomes and milestones marked as No Longer Tracking also get assessed during the manual refresh and show the updated status. Previously, outcome and milestone progress was updated only 4 times a day on a scheduled basis.

### [Try Sales Programs for Free with Enablement Lite](#)

Explore how sales programs can help you target revenue outcomes and grow seller confidence and performance. If you're not using Enablement already, your company can try it for free. With Enablement Lite, you can build programs, define milestones and outcomes, manage content, assign users, and track performance with some limits on the number of programs and users. Along the way, find inspiration to roll out the full Enablement capabilities to your sales reps.

### [Other Changes in Enablement](#)

Salesforce admins, Enablement teams, and content creators benefit from other enhancements throughout the Enablement workflow.

## **Build a Community of Loyal Partners with Partner Enablement Programs and In-App Guidance**

Drive business growth and cultivate brand loyalty by helping your company's partners ramp up quickly on your products, processes, and services. Deliver Enablement programs, prompts, and walkthroughs to partner users in your Partner Relationship Management (PRM) site where partners are working and interacting with your brand. Identify business outcomes you want partners to achieve and track their progress and performance with prebuilt analytics dedicated to Partner Enablement programs. Keep partners engaged with content and experiences that help them onboard, discover, level up, and ultimately grow your business. Collectively, this functionality is also called partner tracks.

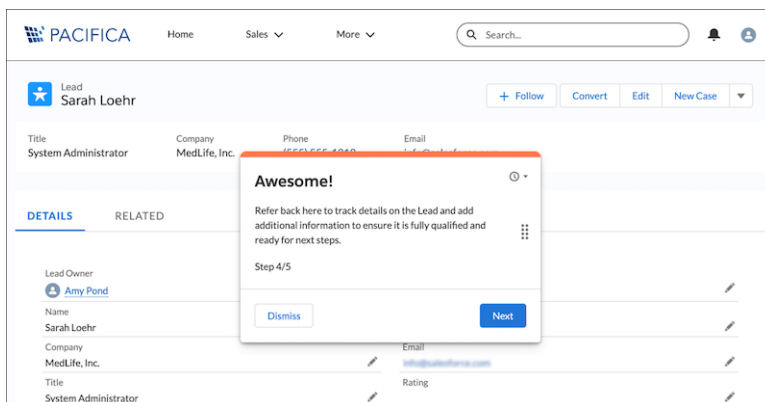
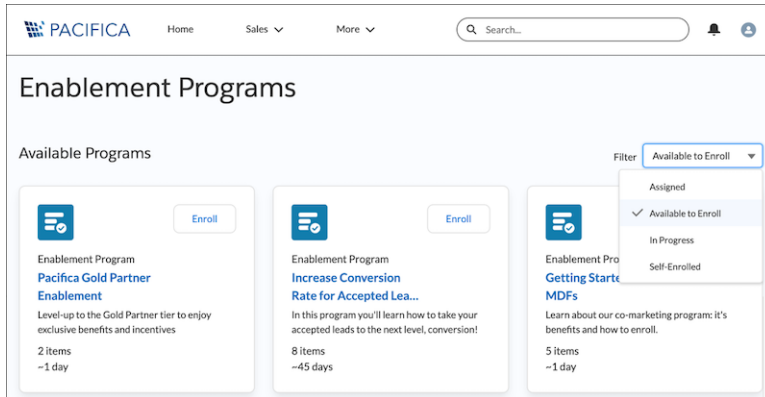
**Where:** This change applies to supported [Experience Cloud sites](#) accessed through Lightning Experience in Enterprise, Performance, and Unlimited editions with Sales Cloud and Service Cloud. An Enablement add-on license and PRM add-on license are required.

**Who:** Only users with the appropriate permissions and who have access to partner sites can create and use programs and in-app guidance for sites. For details on the required permissions, check out the available resources in Salesforce Help.

**How:** In Setup, new options are available for managing permissions and related features for Partner Enablement programs and in-app guidance.

In Program Builder and In-App Guidance Builder, new options are available for selecting the Experience Cloud site where you want to publish programs and in-app guidance.

In Experience Builder, Enablement pages and components are available in the Partner Central template, the Build Your Own template (Aura), and the Automotive, Financial Services Client Portal, Insurance Agent Portal, and B2B Commerce templates.



## SEE ALSO:

- [Salesforce Help: Managing Partner Enablement Programs](#) (can be outdated or unavailable during release preview)
- [Salesforce Help: View the Partner Enablement Dashboard](#) (can be outdated or unavailable during release preview)
- [Salesforce Help: Enablement Permission Set Groups, Permission Sets, and Permissions](#) (can be outdated or unavailable during release preview)
- [Salesforce Help: Permissions for Creating and Accessing In-App Guidance](#) (can be outdated or unavailable during release preview)

## Expand Your Enablement Strategy to More Users with Program Self-Enrollment

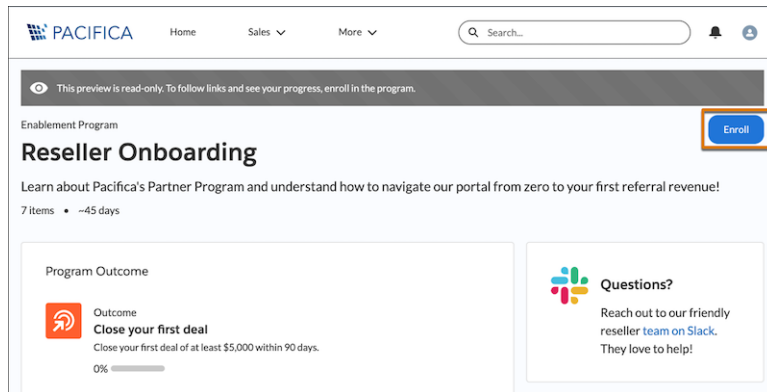
Quickly scale your Enablement rollout to more users across all your company's experiences. Sales reps in Lightning Experience and partner users in supported Digital Experiences sites can self-enroll in selected programs that you share. Self-enrolled programs mostly behave the same as programs that an Enablement admin assigns and can include the same outcomes, milestones, exercises, and due dates.

**Where:** This change applies to:

- Lightning Experience in Enterprise, Performance, and Unlimited editions with Sales Cloud, Service Cloud, or Salesforce Platform. An Enablement add-on license is required.
- Supported [Experience Cloud sites](#) accessed through Lightning Experience in Enterprise, Performance, and Unlimited editions with Sales Cloud and Service Cloud. An Enablement add-on license and PRM add-on license are required.

**How:** In Program Builder, turn on **Users Can Self-Enroll** when editing a program.

After you publish the program, share the program with specific users, groups, or roles. For sales programs in Lightning Experience, users can navigate to program records and click **Enroll**. For partner programs in supported Experience Cloud sites, users can click **Enroll** when previewing a program or viewing a list of available programs.



Enablement Program record detail pages show whether a program is assigned or self-enrolled. Prebuilt reports and dashboards use the term “user” instead of “assignee” to include both assigned and self-enrolled users.

#### SEE ALSO:

[Salesforce Help: Considerations and Limitations for Enrolling Users in Enablement Programs \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Share Enablement Programs So Users Can Self-Enroll \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Take Enablement Programs \(can be outdated or unavailable during release preview\)](#)

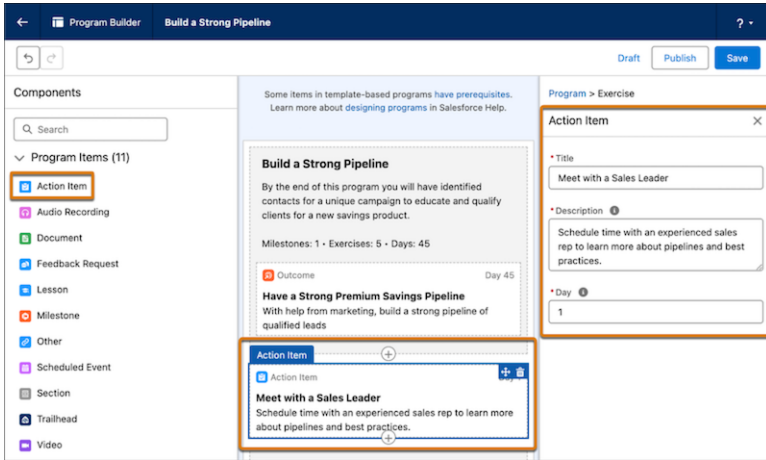
## Assign Offline Tasks to Your Sales Reps in Enablement Programs

Provide a complete representation of all the offline activities that your sales reps perform during the course of an Enablement program. With the Action Item exercise type in your program, create tasks that your sales reps can complete away from their computers. You can include in-person tasks or to-dos in the exercise, such as visiting an office, catching up with the team, or having coffee with a manager.

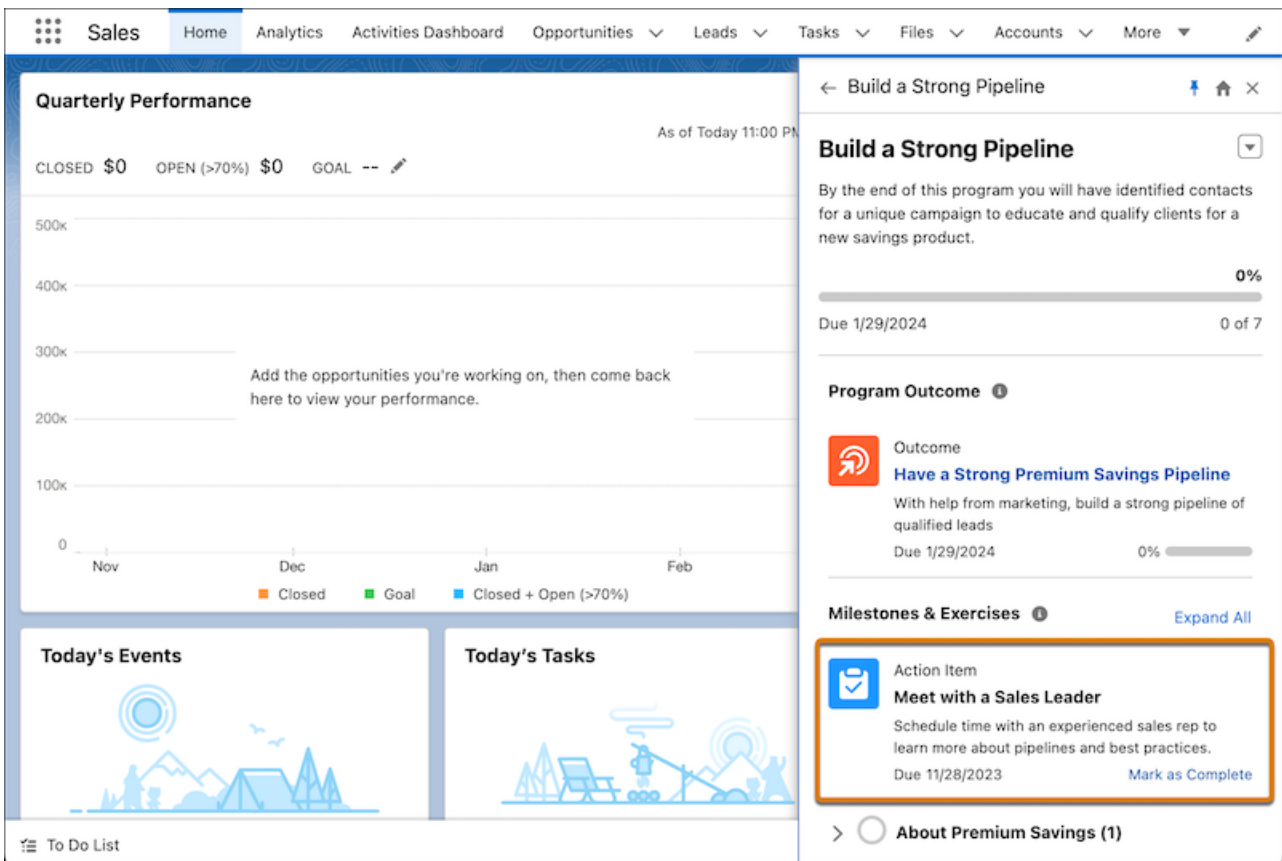
**Where:** This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions with Sales Cloud, Service Cloud, or Salesforce Platform. An Enablement add-on license is required.

**Who:** Users with the Design and Deliver Enablement Programs permission can add Action Item exercises to Enablement programs. Users with the Take Enablement Programs permission can access the Action Item exercises in the Guidance Center.

**How:** Enablement admins add the Action Item exercise to a program from Program Builder and mention the task details in the description field.



Enablement users complete the task described in the exercise and mark exercise completion in the Guidance Center.



SEE ALSO:

[Salesforce Help: Exercises Types in Enablement Programs Experience](#) (can be outdated or unavailable during release preview)

[Salesforce Help: Take Enablement Programs](#) (can be outdated or unavailable during release preview)

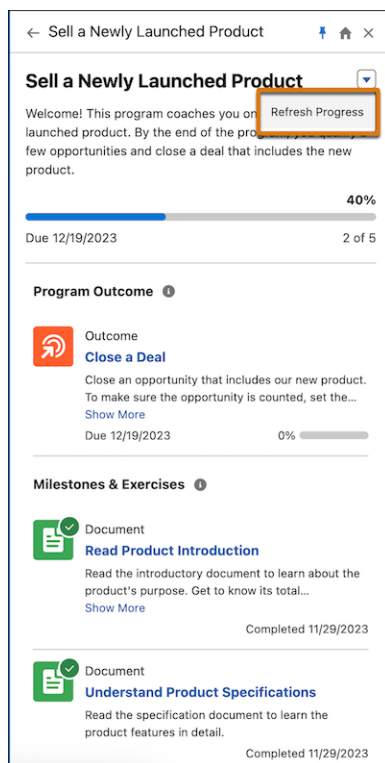
## Refresh Program Progress at Your Convenience

Enablement users can now enjoy more timely insights into their program progress. Users can manually refresh their progress to see the outcome and milestone updates while taking a program. The progress updates provide an immediate validation that users are completing program goals successfully and help them plan the next goal with more confidence. Outcomes and milestones marked as No Longer Tracking also get assessed during the manual refresh and show the updated status. Previously, outcome and milestone progress was updated only 4 times a day on a scheduled basis.

**Where:** This change applies to:

- Lightning Experience in Enterprise, Performance, and Unlimited editions with Sales Cloud, Service Cloud, or Salesforce Platform. An Enablement add-on license is required.
- Supported [Experience Cloud sites](#) accessed through Lightning Experience in Enterprise, Performance, and Unlimited editions with Sales Cloud and Service Cloud. An Enablement add-on license and PRM add-on license are required.

**How:** Sales reps open a program in the Guidance Center and click **Refresh Progress** from the action dropdown. Reps refresh the browser after a minute to see the program progress updates.



Partner users access a program in their supported Digital Experiences sites and click **Refresh Progress**. Users refresh the browser after a minute to see the program progress updates.

SEE ALSO:

[Salesforce Help: Take Enablement Programs \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Considerations for Analyzing Program Completion \(can be outdated or unavailable during release preview\)](#)

## Try Sales Programs for Free with Enablement Lite

Explore how sales programs can help you target revenue outcomes and grow seller confidence and performance. If you're not using Enablement already, your company can try it for free. With Enablement Lite, you can build programs, define milestones and outcomes, manage content, assign users, and track performance with some limits on the number of programs and users. Along the way, find inspiration to roll out the full Enablement capabilities to your sales reps.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions with Sales Cloud.

**Who:** Users with the Design and Deliver Enablement Lite Programs permission can create, assign, and track programs for free. Users with the Take Enablement Lite Programs permission can take programs for free.

**How:** From Setup, on the Enablement Settings page, turn on **Try Enablement for Free**.

### SEE ALSO:

[Salesforce Help: Enablement Lite Permissions \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Enablement Lite Considerations and Limitations \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: View Reports for Enablement Lite Programs \(can be outdated or unavailable during release preview\)](#)

## Other Changes in Enablement

Salesforce admins, Enablement teams, and content creators benefit from other enhancements throughout the Enablement workflow.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions with Sales Cloud, Service Cloud, or Salesforce Platform. An Enablement add-on license is required.

**How:** These changes are available.

- On an Enablement Program record detail page, the Enrolled Users related list includes an Assignment Status column, and the Status column is renamed Program Status. For programs that an Enablement admin assigns to users, the Assignment Status column shows whether the assignment job succeeded, failed, or remains in progress. For assignments that failed, unassign the user and then reassign them.
- Two new status values are available to track program, milestone, and exercise progress: No Longer Tracking and Overdue. The No Longer Tracking status doesn't apply to exercises.
- The Enablement workspace in the Digital Experiences app supports the Salesforce CMS capability for unpublishing content that was previously published.
- When you assign 50 or fewer users to a program, the assignment window remains open until the job completes. If you assign more than 50 users, you receive an email notification with the assignment results. Previously, this cutover occurred at 10 users.
- Enablement users can preview assigned and enrolled programs using the Preview action on the Enablement Programs page or the Enablement Program record detail page.

### SEE ALSO:

[Salesforce Help: Considerations and Limitations for Enrolling Users in Enablement Programs \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Guidelines for Digital Experiences Content in Enablement Programs \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Take Enablement Programs \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Completion Statuses in Enablement Analytics](#)

## Guidance Center and In-App Guidance

Start using the new domain for Setup pages with prompts and walkthroughs you create in Lightning Experience. Align your permissions governance strategy for Enablement programs and in-app guidance.

### [Create and Test In-App Guidance in Lightning Experience with the New Setup Domain](#)

Continue to provide trusted content for your users after Setup pages switch to the new salesforce-setup.com domain. You can still create and test prompts and walkthroughs in Lightning Experience with just a few minor behavior changes to accommodate the new domain.

### [Find a New Name for Prompt and Walkthrough Management Permissions](#)

Keep your company's in-app guidance managers aligned with other Enablement and in-app guidance permissions. The Manage Prompts permission is now named Design and Deliver In-App Guidance. This change doesn't affect any functionality.

## Create and Test In-App Guidance in Lightning Experience with the New Setup Domain

Continue to provide trusted content for your users after Setup pages switch to the new salesforce-setup.com domain. You can still create and test prompts and walkthroughs in Lightning Experience with just a few minor behavior changes to accommodate the new domain.

**Where:** These changes apply to Lightning Experience in Group, Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

**How:** When you add a walkthrough step that switches between Setup and other apps in Lightning Experience, you're now prompted to save if the step navigates to an app with a different domain. The page refreshes, and you can resume creating the walkthrough in the different domain.

Test mode now uses query parameters in the page URL to track progress information instead of cookies. Also, the banner that appears at the top of the page in test mode no longer includes options to exit testing or open In-App Guidance Builder. Instead, you exit test mode by closing the browser tab or removing the query parameters from the page URL.

Test mode isn't available for in-app guidance created in supported Experience Cloud sites.

SEE ALSO:

[Allow the New Setup Domain to Ensure Access to Salesforce Setup Pages](#)

[Salesforce Help: Preview and Test In-App Guidance \(can be outdated or unavailable during release preview\)](#)

## Find a New Name for Prompt and Walkthrough Management Permissions

Keep your company's in-app guidance managers aligned with other Enablement and in-app guidance permissions. The Manage Prompts permission is now named Design and Deliver In-App Guidance. This change doesn't affect any functionality.

**Where:** These changes apply to Lightning Experience in Group, Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

SEE ALSO:

[Salesforce Help: Permissions for Creating and Accessing In-App Guidance \(can be outdated or unavailable during release preview\)](#)

## Partner Relationship Management

Help your channel business thrive with Partner Relationship Management (PRM). Channel managers work with confidence from the Channel Management Console, a dedicated app that acts as a command center for your indirect sales. Build loyal partners with streamlined onboarding and training using Partner Enablement and In-App Guidance. Plus, partners can get deeper insight into their contacts, leads, and opportunities with access to Contact Intelligence View, Lead Intelligence View, and more Pipeline Inspection features.

### [Monitor Your Channel Business Like a Pro from the Channel Management Console](#)

Now channel managers can get a complete view of their partners' sales activity from a new dedicated app. Easily access partner sales records from the Accounts, Contacts, Leads, or Opportunities tabs. Review and approve partners' leads from the Leads to Review component. Follow partner performance closely using a centrally located dashboard that shows key metrics. At a glance, see closed revenue, conversion rates, and open opportunities. For channel managers using Partner Enablement, metrics on Enablement program progress are available. Plus, you can customize the console by adding the objects and components that best assist the channel managers at your company.

### [Enable and Guide Your Partners](#)

Equip partners with the resources and content that drives growth for your business, all from within your branded partner experience. Partner Enablement and In-App Guidance are now available in supported Experience Cloud sites. Deliver Enablement programs, prompts, and walkthroughs to partners in the flow of their daily work, and then track progress towards goals with enablement-focused analytics.

### [Sharpen Selling Decisions with a Consolidated View of Insights on Contacts or Leads](#)

Partners can view activities, complete actions, and update records, from one view of their contacts or leads. Contact Intelligence View and Lead Intelligence View are now available in supported Experience Cloud sites.

### [Prioritize Selling with More Pipeline Insights and Actions](#)

Now partners get a deeper understanding of their deal health and activity from the Enhanced List View component in supported Experience Cloud sites. Enhanced List Views now includes a side panel where partners can see AI insights and more metrics and can move deals through the pipeline, all from one location.

### [Track Partner Activity with New Analytics Resources](#)

Report on your channel management, channel marketing, and partner engagement data easily using new predesigned PRM reports, dashboards, and custom report types. Vendors who purchase Partner Enablement now get reports, a dashboard, and custom report types to gauge the progress that partners make in their enablement programs.

### [Other Changes for Partner Relationship Management](#)

Find settings more easily from Partner Relationship Management (PRM) Setup. Learn the new name for the component that lets partners access Pipeline Inspection, Contact Intelligence, and Lead Intelligence in Experience Builder.

## Monitor Your Channel Business Like a Pro from the Channel Management Console

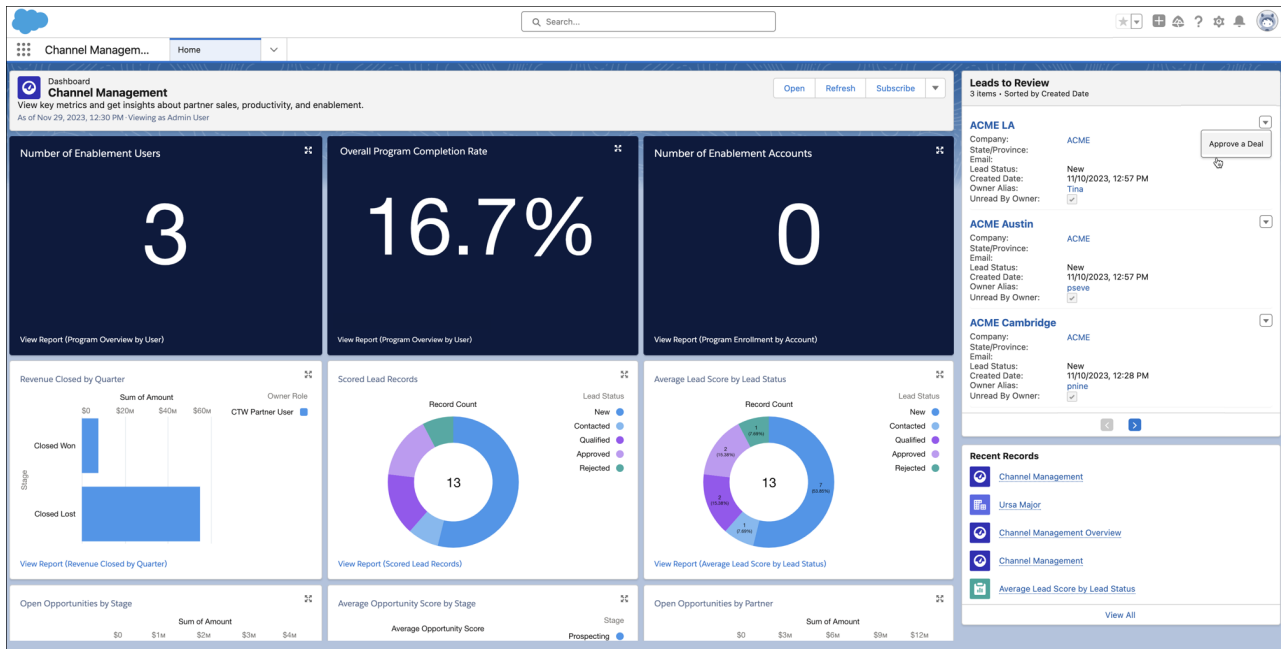
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**Where:** This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions. A PRM add-on license is required.

**How:** Set up the console app from the Channel Management page in PRM Setup.



Then channel managers access the console by searching for Channel Management from the App Launcher.



## Enable and Guide Your Partners

Equip partners with the resources and content that drives growth for your business, all from within your branded partner experience. Partner Enablement and In-App Guidance are now available in supported Experience Cloud sites. Deliver Enablement programs, prompts, and walkthroughs to partners in the flow of their daily work, and then track progress towards goals with enablement-focused analytics.

**Where:** This change applies to supported Experience Cloud sites accessed through Lightning Experience in Enterprise, Performance, and Unlimited editions with Sales Cloud or Service Cloud. An Enablement add-on license and PRM add-on license are required.

SEE ALSO:

[Build a Community of Loyal Partners with Partner Enablement Programs and In-App Guidance](#)

[Salesforce Help: User License and Experience Cloud Template Support for Partner Relationship Management \(can be outdated or unavailable during release preview\)](#)

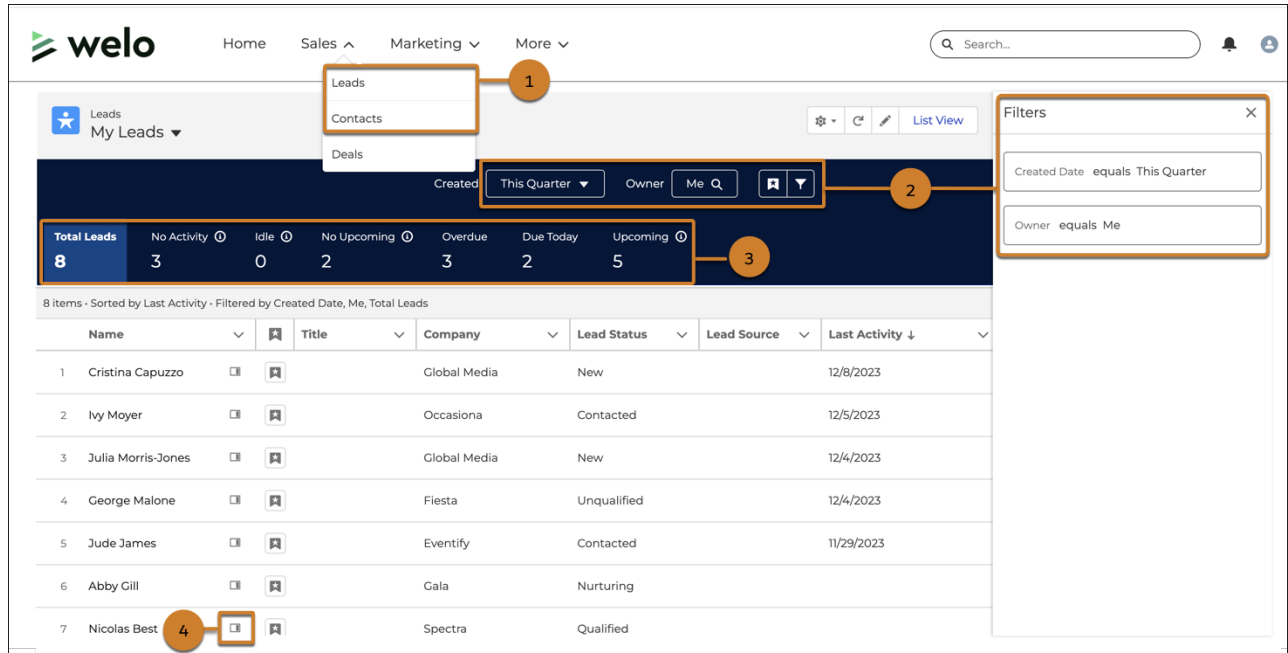
## Sharpen Selling Decisions with a Consolidated View of Insights on Contacts or Leads

Partners can view activities, complete actions, and update records, from one view of their contacts or leads. Contact Intelligence View and Lead Intelligence View are now available in supported Experience Cloud sites.

**Where:** This change applies to supported Experience Cloud sites accessed through Lightning Experience in Enterprise, Performance, and Unlimited editions. A PRM add-on license is required.

**How:** Set up Contact Intelligence View and Lead Intelligence View in your Experience Cloud sites and work with your site developer to verify that the Enhanced Lists View component is added to your Experience Cloud site.

Then, from their site, partners select whether they want an enhanced view of contacts or leads (1), filter those records (2), and see aggregate activity statistics across the filtered records (3). To see detailed insights on a record, partners click the side panel icon (4).



From the side panel, partners see more activity metrics, such as which records are overdue (5) and which have activities scheduled today (6). Partners can also send an email to the prospect or customer (7), or create a task or log a call (8). For contacts, Case Insights are also available from the Insights tab.

The screenshot displays the Welo CRM interface. At the top, there's a navigation bar with 'Home', 'Sales', 'Marketing', and 'More' menus, a search bar, and a user profile icon. Below this is a 'Leads' section with 'My Leads' and a 'List View' button. A summary bar shows 'Total Leads: 8' and filters for 'Created: This Quarter' and 'Owner: Me'. A table lists 8 leads with columns for Name, Title, Company, and Lead Status. A side panel for 'George Malone' shows 'Insights' and 'Activity' tabs. The 'Activity' tab displays 'Viewing Last 7 Days' and lists activities like 'Overdue Task', 'Recent Activities (Today)', 'Send Letter', and 'Meeting'. A 'Send Email' button is highlighted at the bottom right.

Name	Title	Company	Lead Status
1 Cristina Capuzzo		Global Media	New
2 George Malone		Global Media	Unqualified
3 Ivy Moyer		Occasiona	Contacted
4 Julia Morris-Jones		Global Media	New
5 Jude James		Eventify	Contacted
6 Abby Gill		Gala	Nurturing

## SEE ALSO:

[Salesforce Help: Set Up Contact Intelligence View and Lead Intelligence View for Partners](#) (can be outdated or unavailable during release preview)

[Salesforce Help: User License and Experience Cloud Template Support for Partner Relationship Management](#) (can be outdated or unavailable during release preview)

## Prioritize Selling with More Pipeline Insights and Actions

Now partners get a deeper understanding of their deal health and activity from the Enhanced List View component in supported Experience Cloud sites. Enhanced List Views now includes a side panel where partners can see AI insights and more metrics and can move deals through the pipeline, all from one location.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions. A PRM add-on license is required.

**How:** Work with your site developer to set up side panel Pipeline Inspection features in your Experience Cloud sites.

Then, from their sites, partners click the side panel icon next to a record (1). Partners see opportunity metrics for Days to Close, Days in Stage, and Push Count (2). For partner users who are assigned the Sales Cloud Einstein for Partners permission set, an Opportunity Score insight is also available (3).

From the Insights tab, partners see more insights on scores, activities, service cases, and the likelihood of the deal to close.

From the Activity tab (4), partners can see upcoming (5) and recent (6) activities, and edit them (7). Partners can also complete actions, such as sending emails (8); logging related calls, events, and tasks; and editing the opportunity's next step (9).

The screenshot displays the 'My Pipeline' view in Salesforce. At the top, there's a summary bar for '465,000 Widgets' with metrics for Opportunity Score (High), Days to Close (1), Days in Stage (1), and Push Count (2). Below this is a table of 7 items, sorted by Close Date. The table columns are Opportunity Name, Account Name, Amount, Close Date, and Stage. The first row is highlighted, showing '150,000 Widgets' for 'Acme' with a close date of 12/4/2023 and a stage of 'Value Proposition'. A detailed activity panel is open for this opportunity, showing 'Upcoming Activity (Tomorrow)' with a 'Send Quote' task and 'Recent Activities (Today)' including a 'Call' and a 'Meeting'. A 'Send Email' button is visible at the bottom of the activity panel.

Opportunity Name	Account Name	Amount	Close Date	Stage
1 150,000 Widgets	Acme	\$100,000.00	12/4/2023 →	Value Proposition →
2 70,000 Widgets	Global Media	\$7,000.00	12/5/2023	Needs Analysis
3 700 Widgets	Acme	\$90,000.00	12/8/2023 →	Needs Analysis →
4 465,000 Widgets	CTW	\$1,000,000...	12/8/2023 →	Needs Analysis →
5 200 Widgets	Alpha	\$100,000.00	12/8/2023	Id. Decision Makers ←
6 300,000 Widgets	Alpha	\$100,750.00	12/15/2023	Perception Analysis
7 250,000 Widgets	Global Media	\$100,000.00 ↑	12/22/20... →	Perception Analysis →

## SEE ALSO:

[Salesforce Help: Set Up Pipeline Inspection for Partners \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: User License and Experience Cloud Template Support for Partner Relationship Management \(can be outdated or unavailable during release preview\)](#)

## Track Partner Activity with New Analytics Resources

Report on your channel management, channel marketing, and partner engagement data easily using new predesigned PRM reports, dashboards, and custom report types. Vendors who purchase Partner Enablement now get reports, a dashboard, and custom report types to gauge the progress that partners make in their enablement programs.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions. A PRM add-on license is required.

**How:** To give partners access to the latest PRM analytics, make sure that you've shared the PRM Reports and PRM Dashboards folders with channel managers. You can do so from the Channel Management page in PRM Setup.

Then, from the PRM reports folder, partners can check out new prebuilt reports on partner fund claims and recent partner logins to Experience Cloud sites.

From the PRM dashboards folder, partners can check out the new Channel Marketing dashboard and the Channel Marketing Overview dashboard, which includes metrics that channel managers see on the home page of the new Channel Management Console.

Develop your own PRM reports and dashboards by using the object data from new custom report types. Develop reports on partner funds, partner marketing budgets, login history, and Salesforce and partner user details.

**SEE ALSO:**

[Salesforce Help: Partner Relationship Management Reports and Dashboards \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: View Partner Relationship Management Reports \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: View Partner Relationship Management Dashboards \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: User License and Experience Cloud Template Support for Partner Relationship Management \(can be outdated or unavailable during release preview\)](#)

## Other Changes for Partner Relationship Management

Find settings more easily from Partner Relationship Management (PRM) Setup. Learn the new name for the component that lets partners access Pipeline Inspection, Contact Intelligence, and Lead Intelligence in Experience Builder.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions. A PRM add-on license is required.

**Why:** Check out these changes for PRM.

- We reorganized and renamed the PRM Setup pages to make it easier to locate PRM features.
  - The Setup page previously called Channel Productivity is now called Partner Productivity.
  - We moved setup for these features to the Partner Productivity page.
    - Einstein Lead Scoring and Einstein Opportunity Scoring Pipeline Inspection
    - Campaign Management and Salesforce CMS
    - Case Management, Knowledge Bots, and Einstein Bots
  - We moved the steps for sharing PRM reports and dashboards folders with partners to the Channel Management page.
  - The Enable Your Partners section changed location on the Channel Management page and now includes Partner Enablement as an alternative to our AppExchange offerings for enabling your partners.
- The Enhanced Object View component, which lets sales partners access Pipeline Inspection, Contact Intelligence, and Lead Intelligence in Experience Cloud sites, is now called Enhanced List Views.
- If the release occurs before you set up a feature, sometimes you must manually create the PRM Reports and Dashboards that are normally delivered to you each release through an automated process. Get the latest reports and dashboards from the Channel Management page in PRM Setup.

**SEE ALSO:**

[Salesforce Help: Get the Latest Partner Relationship Management Reports and Dashboards \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Enhanced List Views \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: View the Partner Enablement Dashboard \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: User License and Experience Cloud Template Support for Partner Relationship Management \(can be outdated or unavailable during release preview\)](#)

## Sales Performance Management

Plan your sales with participation and accountability from stakeholders for their areas of responsibility. Optimize boundary assignments using a variety of methods, and experience an easier planning routine—all in Sales Planning.

### [Sales Planning](#)

Get the right participation from stakeholders in sales planning processes when you grant them the authority to plan for the areas that they own. Optimize boundary assignments using a method of your choice. And discover improvements in your overall planning experience.

## Sales Planning

Get the right participation from stakeholders in sales planning processes when you grant them the authority to plan for the areas that they own. Optimize boundary assignments using a method of your choice. And discover improvements in your overall planning experience.

### [Engage Stakeholders in Sales Planning Processes](#)

Get the right input from the right teammates when you give them authority to manage sales plans and work on specific parts of plan hierarchies in Sales Planning.

### [Optimize Boundary Assignments](#)

Keep your reps focused on the records that fall within the boundaries that they own. Assign boundaries such as countries, states, or postal codes to your reps in Sales Planning.

### [Other Improvements in Sales Planning](#)

Start your sales planning routine with an easier setup experience, work with the latest data and boundaries from Salesforce, and manage boundaries at any hierarchical level in Sales Planning.

## Engage Stakeholders in Sales Planning Processes

Get the right input from the right teammates when you give them authority to manage sales plans and work on specific parts of plan hierarchies in Sales Planning.

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

**How:** In Salesforce, add the Data Pipelines Base User permission set license for each teammate. Then assign them the permission set that aligns with their goal in the sales planning process.

Teammate's Goal	Required Permission Set	Authority That the Permission Set Provides
Administer Sales Planning	Sales Planning Admin	<ul style="list-style-type: none"> <li>• Enable and disable Sales Planning features</li> <li>• Create, read, update, and delete sales plans</li> <li>• Share and publish sales plans</li> <li>• Determine whether to designate others as co-administrators</li> </ul>
Process data as the OAuth user		
Manage sales plans	Sales Planning Ops Manager	<ul style="list-style-type: none"> <li>• Create, read, update, and delete sales plans</li> <li>• Add and manage assignment objects</li> <li>• Add and manage allocation metrics</li> <li>• Share and publish sales plans</li> </ul>

Teammate’s Goal	Required Permission Set	Authority That the Permission Set Provides
Edit or view specific areas in hierarchies	Sales Planning Ops Analyst	For editors: <ul style="list-style-type: none"> <li>• Create, share, and view hierarchy nodes and their descendents</li> <li>• Update assignments and allocations</li> </ul> For viewers: <ul style="list-style-type: none"> <li>• View hierarchy nodes and their descendents</li> <li>• View assignments and allocations</li> </ul>

SEE ALSO:

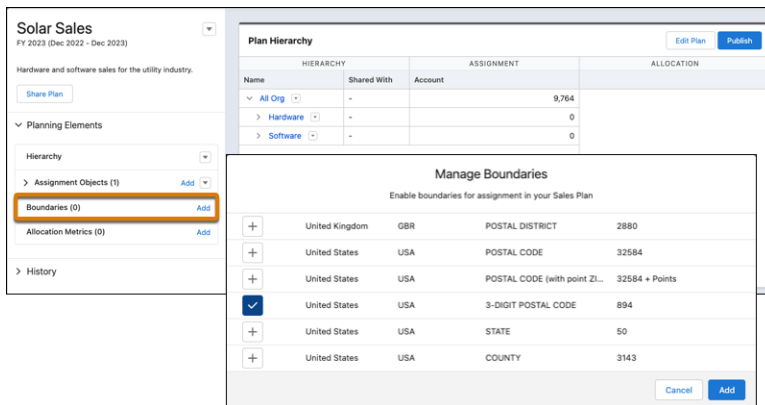
[Salesforce Help: Establishing User Permissions for Sales Planning \(can be outdated or unavailable during release preview\)](#)

### Optimize Boundary Assignments

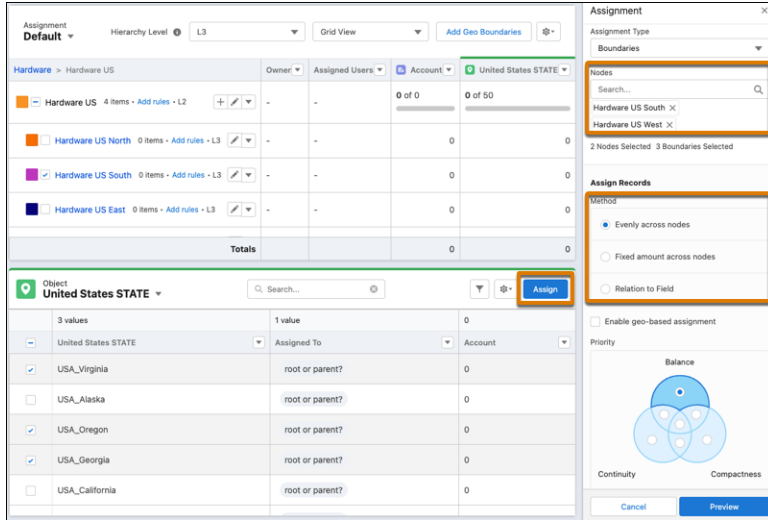
Keep your reps focused on the records that fall within the boundaries that they own. Assign boundaries such as countries, states, or postal codes to your reps in Sales Planning.

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

**How:** Sales managers or operations managers add the boundaries that best align with company goals.



They select the boundaries to assign and the hierarchy nodes that they want to apply assignments to. Then they specify an assignment method and how to prioritize the assignments.



SEE ALSO:

[Salesforce Help: Assign Boundaries to Your Reps](#) (can be outdated or unavailable during release preview)

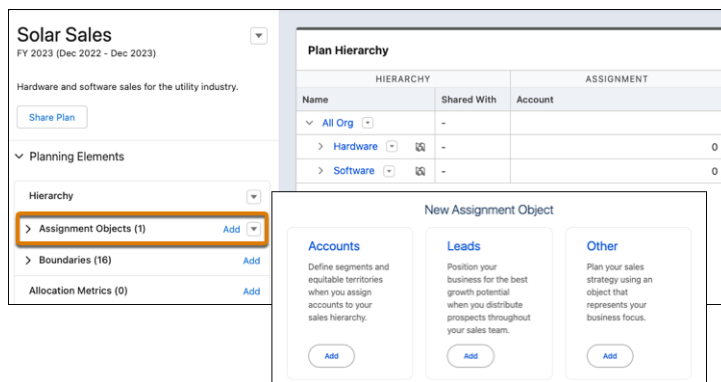
## Other Improvements in Sales Planning

Start your sales planning routine with an easier setup experience, work with the latest data and boundaries from Salesforce, and manage boundaries at any hierarchical level in Sales Planning.

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

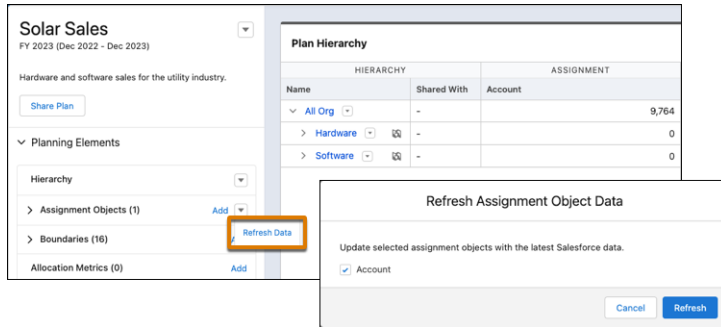
**How:** Planning your sales strategy just got easier. Here's how.

- Get a jump start on planning when you add assignment objects and select from their common fields that make your sales plans effective.

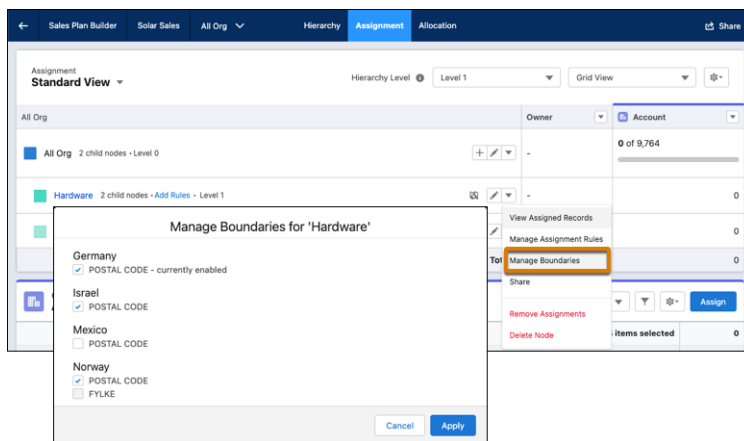


- Plan your sales strategy using the most recent data for assignment objects. You specify which assignment objects' data to refresh.





- Add and update boundaries at any level within sales plan hierarchies. Select a boundary type for each country that's within your sales plan.



SEE ALSO:

- [Salesforce Help: Specify the Kinds of Records to Assign \(can be outdated or unavailable during release preview\)](#)
- [Salesforce Help: Refresh Data Sources for Continual Sales Plan Optimization \(can be outdated or unavailable during release preview\)](#)
- [Salesforce Help: Assign Boundaries to Your Reps \(can be outdated or unavailable during release preview\)](#)

## Email, Calendar, and Integrations

See a new view of suggested time slots for meetings. Learn about upcoming product retirements.

### [Outlook and Gmail Integration](#)

Now we suggest associations for you, so all you have to do is click to log the email or event. Sales reps can also use generative AI in Salesforce.

### [Email Experience](#)

Time slots for an email meeting invite have a new look.

### [Salesforce Inbox](#)

Check out the latest improvements to Salesforce Inbox.

### [Salesforce for Outlook \(Retiring\)](#)

Full product retirement for Salesforce for Outlook is scheduled for December 2027. If you're sticking with Salesforce for Outlook for now, you can access past release notes about the current version from the Trailblazer Community.

## Outlook and Gmail Integration

Now we suggest associations for you, so all you have to do is click to log the email or event. Sales reps can also use generative AI in Salesforce.

### [Log Emails and Events More Accurately and Quickly](#)

Email and event logging for the Outlook and Gmail integration is newly streamlined for users without EAC. It's faster to accept suggestions than create your own associations. Now when a rep sends or receives an email, or logs an event, we propose which people and records to associate with. We also show attachment info for emails, and log those attachments by default.

### [Get More Options in Your Email Integration with Custom Sales Email Templates](#)

Users now have more choices when creating sales emails. Sales Email templates, made in Prompt Builder, are available to all users with an Outlook or Gmail integration.

### [Enter Generative AI Instructions to Create Sales Emails in Email Integrations](#)

Let sales reps create their own generative AI email drafts. The existing pre-made instructions for sales emails cover typical situations. But sometimes a rep needs a special email and therefore wants to provide unique instructions to Einstein. Reps can use the draft immediately or revise it until they get the output they're looking for.

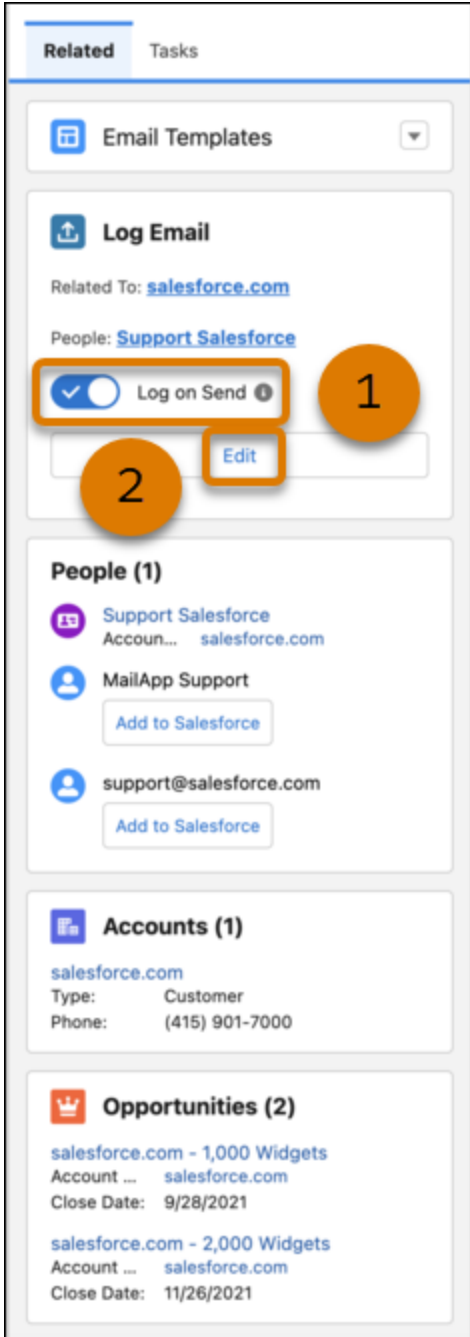
## Log Emails and Events More Accurately and Quickly

Email and event logging for the Outlook and Gmail integration is newly streamlined for users without EAC. It's faster to accept suggestions than create your own associations. Now when a rep sends or receives an email, or logs an event, we propose which people and records to associate with. We also show attachment info for emails, and log those attachments by default.

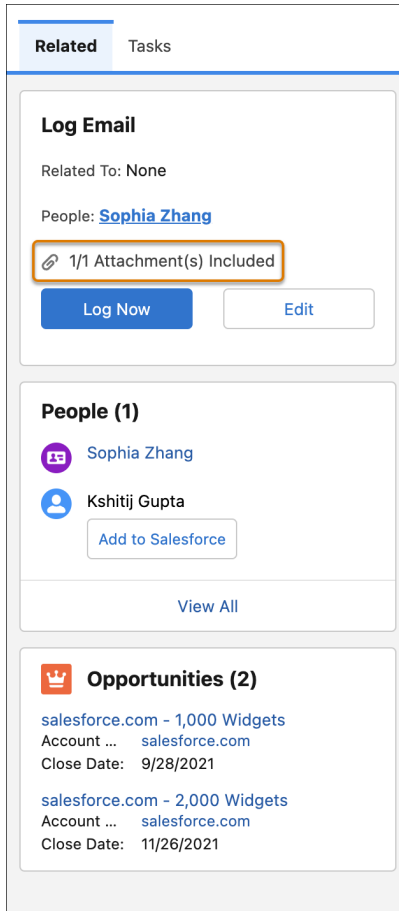
**Where:** This change applies to Lightning Experience and Salesforce Classic in Essentials, Professional, Enterprise, Unlimited, and Developer editions.

**How:** For inbound emails, the sales rep accepts the suggestions (1) or makes edits (2) before logging.

For outbound emails, reps click **Log on Send** (1) and then send the email to use the associations that were created. Or, they can make edits (2) to the associations first, and then click **Log on Send** and send the email.



Attachment info is shown and we log attachments by default.



SEE ALSO:

[Salesforce Help: View and Work with Salesforce Data in Outlook and Gmail \(can be outdated or unavailable during release preview\)](#)

## Get More Options in Your Email Integration with Custom Sales Email Templates

Users now have more choices when creating sales emails. Sales Email templates, made in Prompt Builder, are available to all users with an Outlook or Gmail integration.

**Where:** This feature is available in Lightning Experience in Performance and Unlimited editions.

Einstein generative AI is available in Lightning Experience. To purchase Einstein for Sales, contact your Salesforce account executive.

**When:** This feature became available on February 29, 2024.

**Who:** To use custom sales email templates, users need the Einstein Prompt Builder license and Einstein GPT Prompt Template User permission set. To create custom sales email templates, users need the Einstein GPT Prompt Template Manager permission set.

**How:** This feature is also available in the Lightning Experience email composer.

When creating an email, click **Draft with Einstein**. Then open the dropdown list and review the items listed under Custom.

SEE ALSO:

[Get More Options with Custom Sales Email Templates](#)

[Salesforce Help: Draft a Sales Email with Einstein Generative AI \(can be outdated or unavailable during release preview\)](#)

## Enter Generative AI Instructions to Create Sales Emails in Email Integrations

Let sales reps create their own generative AI email drafts. The existing pre-made instructions for sales emails cover typical situations. But sometimes a rep needs a special email and therefore wants to provide unique instructions to Einstein. Reps can use the draft immediately or revise it until they get the output they're looking for.

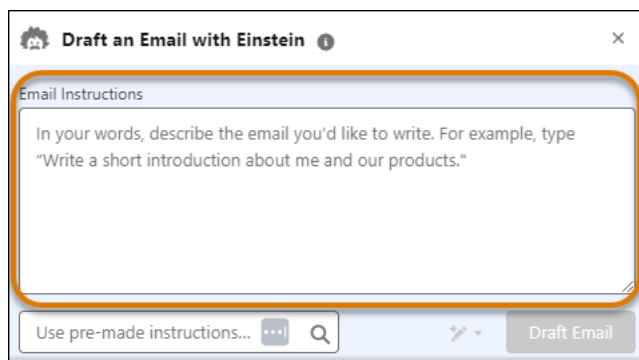
**Where:** This feature is available in Lightning Experience in Performance and Unlimited editions. Einstein generative AI is available in Lightning Experience.

To purchase Einstein for Sales, contact your Salesforce account executive.

**When:** This feature became available on April 11, 2024.

**Who:** To use Sales Emails, users need the Einstein Sales Emails permission set. To let reps access the feature in Gmail or Outlook, set up the Gmail or Outlook integration.

**How:** When creating an email, click **Draft with Einstein**. Enter instructions for Einstein and click **Draft Email**.



A proposed draft email appears for review. Revise the content or use it to send an email.

### SEE ALSO:

[Let Users Enter Generative AI Instructions to Create Sales Emails](#)

[Control Whether Users Can Enter Their Own Sales Email Prompt Instructions](#)

[Salesforce Help: Draft a Sales Email with Einstein Generative AI \(can be outdated or unavailable during release preview\)](#)

## Email Experience

Time slots for an email meeting invite have a new look.

### [Time Slots for Suggested Meeting Times Have a New Look](#)

When a sales rep's email includes suggested meeting times, the possible time slots are shown as rectangles. The person opening the email clicks a time slot to select that meeting time. The time slots have an updated look and are more efficient to generate.

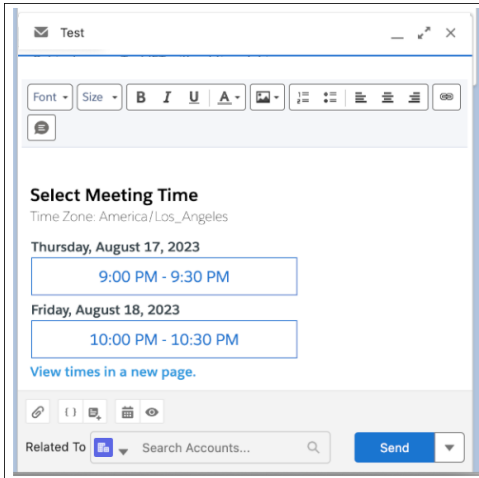
## Time Slots for Suggested Meeting Times Have a New Look

When a sales rep's email includes suggested meeting times, the possible time slots are shown as rectangles. The person opening the email clicks a time slot to select that meeting time. The time slots have an updated look and are more efficient to generate.

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

**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:** Here's the updated look email recipients see when getting an email with meeting time suggestions.



SEE ALSO:

[Salesforce Help: Considerations for Insert Availability in Lightning Experience Desktop \(can be outdated or unavailable during release preview\)](#)

## Salesforce Inbox

Check out the latest improvements to Salesforce Inbox.

[Salesforce Inbox Mobile](#)

Learn about the latest features and enhancements to Inbox mobile in Salesforce Help.

[Inbox Mobile Was Retired](#)

Inbox mobile is retired as of February 1, 2024.

## Salesforce Inbox Mobile

Learn about the latest features and enhancements to Inbox mobile in Salesforce Help.

- [Inbox Mobile for iOS](#)
- [Inbox Mobile for Android](#)

## Inbox Mobile Was Retired

Inbox mobile is retired as of February 1, 2024.

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

**When:** Full product retirement for Inbox mobile was February 1, 2024.

**Why:** Replace Inbox mobile with Outlook and Gmail integration with inbox on desktop to access most of the Salesforce Inbox features. On mobile, use the Salesforce mobile application to access Salesforce records, with more exciting functionality coming in a future release. For automatic email tracking, Einstein Activity Capture can also be used.

**How:** As of February 1, 2024, you can't access or use Inbox mobile.

SEE ALSO:

[Knowledge Article: Salesforce Inbox Mobile App Retirement](#)

## Salesforce for Outlook (Retiring)

Full product retirement for Salesforce for Outlook is scheduled for December 2027. If you're sticking with Salesforce for Outlook for now, you can access past release notes about the current version from the Trailblazer Community.

[Salesforce for Outlook Is Now Being Retired in December 2027](#)

Full product retirement for Salesforce for Outlook has been rescheduled for December 2027. Previously, retirement was 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 Now Being Retired in December 2027

Full product retirement for Salesforce for Outlook has been rescheduled for December 2027. Previously, retirement was 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 is retired, 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](#)

## Sales Cloud Everywhere

As sales reps search for prospects on the internet, the Sales Cloud Everywhere Chrome extension keeps up with their web investigations. Reps can update prospect and customer info and create records. They can use the grid-like view of their data in Workspace to manage deals. They can create their own Workspace tabs to customize the data they see. In the To Do list, sorting options, additional filters, and enhanced search functionality ensure a rep is focused on their most important tasks.

[Set Up Salesforce Everywhere More Easily](#)

Enabling Sales Cloud Everywhere is easier than ever because it now has a separate enablement section.

### [Stay Logged In to Sales Cloud Everywhere](#)

Salesforce maintains an ongoing session for all users of Sales Cloud Everywhere, increasing productivity by avoiding frequent logouts. Previously, only users logging in to Everywhere with a Gmail account could maintain a session longer than the timeout settings. Now, users of Sales Cloud Everywhere are logged out only when they close their browser or log out manually.

### [Keep Productivity at Hand with the Embedded Side Panel for Everywhere](#)

Chrome browser users access Sales Cloud Everywhere as an embedded part of their browser. The Everywhere side panel is always available, and its width can be adjusted. Previously, the extension was available as a separate window only.

### [Work Efficiently with Sales Cloud Everywhere](#)

Switch among your most frequent work tasks with a navigation menu, check alerts, prospect for new customers, and work on current deals without returning to Home first. See the activity timeline and all related lists for a record. Adding a record to a cadence takes one click. And you can now easily take action, work with your key fields, and see related records all on one record page.

### [Sell More Efficiently in Sales Cloud Everywhere](#)

With one click, users can convert leads or remove leads and contacts from a cadence. Previously, you could only add a record to a cadence.

### [Follow Up on Companies of Interest with Contextual Insights](#)

While looking for future customers, your sales reps research companies on the internet. Now your company's Salesforce database can keep up with the sales research by checking the website they're viewing and seeing if info on that company is available. When a match occurs with data in Salesforce, reps can view what's saved or see additional matches and suggestions. Or, reps can add the company as a new account to keep pursuing them as a potential customer.

### [Follow Up on People of Interest with Contextual Insights](#)

Now your company's Salesforce database can keep up with your sales reps' Internet research by checking the website they're viewing and seeing whether info is available for people mentioned on the site. When a match occurs with data in Salesforce, reps can view what's saved or see other matches and suggestions. Matches include leads, contacts, or person accounts. Or, reps can add the person as a lead to keep pursuing them as a potential customer. Previously, contextual insights found accounts only.

### [Update Data for Many Records in Workspace](#)

Save time by updating the same field in multiple records simultaneously.

### [Focus on the Right Records and Personalize Your Workspace](#)

Your sales reps don't need to wade through extra, unwanted records. Instead they can create a workspace to filter their records and focus only on the data they need. With a personalized targeted workspace with fewer records, they can get right to work.

### [Get the Power of Copilot in Sales Cloud Everywhere](#)

Bring the power of conversational AI to Sales Cloud Everywhere with Einstein Copilot. Einstein Copilot is a generative AI-powered assistant that helps your employees accomplish key business tasks just by asking, such as summarizing records and drafting emails. Available in the Salesforce Chrome extension side panel, Sales Cloud Everywhere lets you work with Salesforce without leaving the web page you're on.

### [See the Fields You Want in Sales Cloud Everywhere](#)

As your sales reps use Sales Cloud Everywhere, they can choose the fields they want to see and arrange them the way they want to work.

## Set Up Salesforce Everywhere More Easily

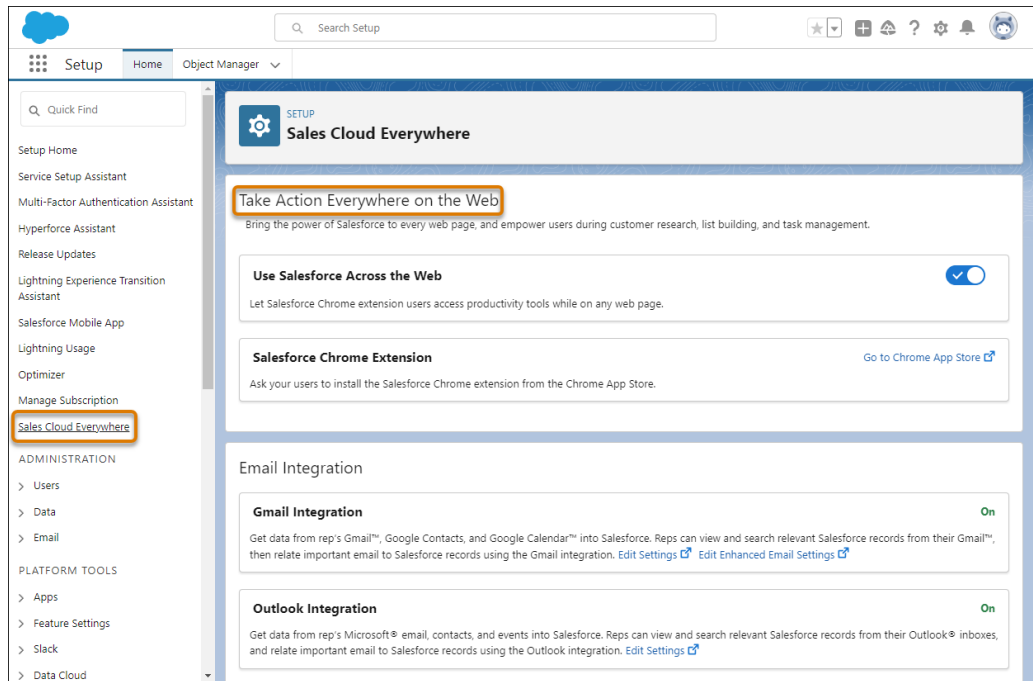
Enabling Sales Cloud Everywhere is easier than ever because it now has a separate enablement section.

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

**When:** This feature became available on February 29, 2024.



**How:** From Setup, in the Quick Find box, enter *Sales Cloud Everywhere*, and then click **Sales Cloud Everywhere**. Enable the setting Take Action Everywhere on the Web.



SEE ALSO:

[Salesforce Help: Enable and Disable the Salesforce Everywhere Chrome Extension \(can be outdated or unavailable during release preview\)](#)

## Stay Logged In to Sales Cloud Everywhere

Salesforce maintains an ongoing session for all users of Sales Cloud Everywhere, increasing productivity by avoiding frequent logouts. Previously, only users logging in to Everywhere with a Gmail account could maintain a session longer than the timeout settings. Now, users of Sales Cloud Everywhere are logged out only when they close their browser or log out manually.

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



SEE ALSO:

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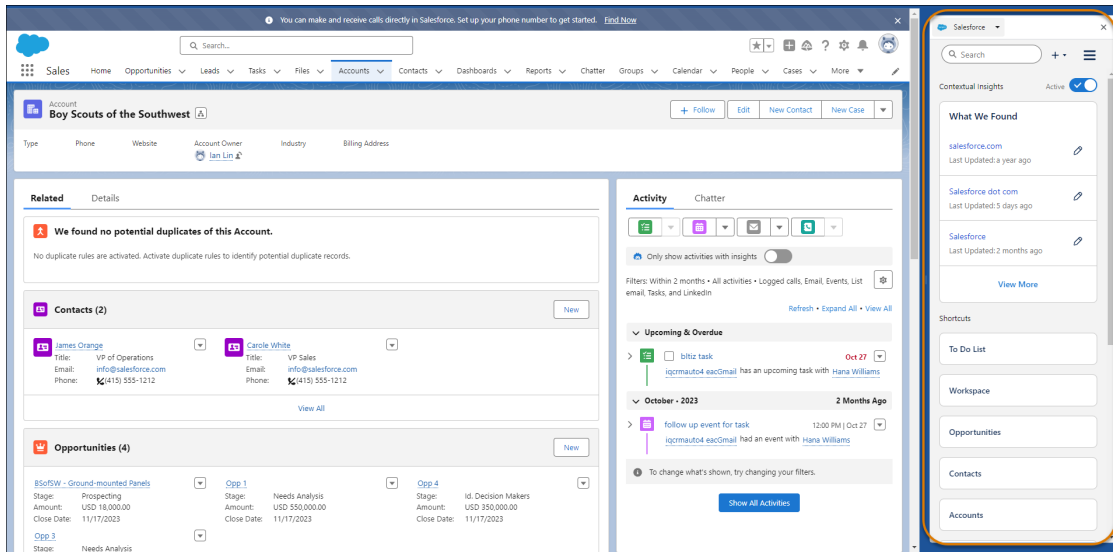
## Keep Productivity at Hand with the Embedded Side Panel for Everywhere

Chrome browser users access Sales Cloud Everywhere as an embedded part of their browser. The Everywhere side panel is always available, and its width can be adjusted. Previously, the extension was available as a separate window only.

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

**How:** Open Sales Cloud Everywhere from the side panel icon , from the pinned Salesforce icon on the browser toolbar , or by using the keyboard shortcut Ctrl+e (Windows) or Cmd+e (Mac).

Click and drag the divider to widen and narrow the Everywhere extension side panel.



## SEE ALSO:

[Salesforce Help: View and Create Records in Sales Cloud Everywhere \(can be outdated or unavailable during release preview\)](#)

## Work Efficiently with Sales Cloud Everywhere

Switch among your most frequent work tasks with a navigation menu, check alerts, prospect for new customers, and work on current deals without returning to Home first. See the activity timeline and all related lists for a record. Adding a record to a cadence takes one click. And you can now easily take action, work with your key fields, and see related records all on one record page.

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## SEE ALSO:

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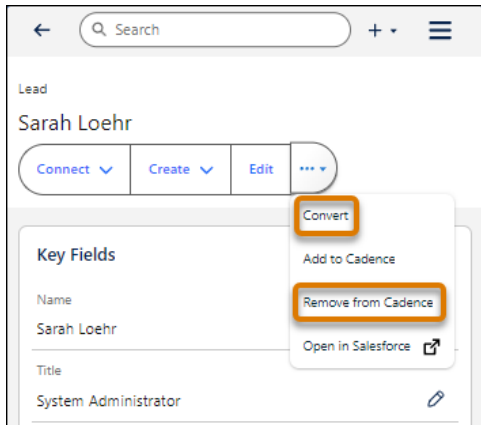
## Sell More Efficiently in Sales Cloud Everywhere

With one click, users can convert leads or remove leads and contacts from a cadence. Previously, you could only add a record to a cadence.

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

**When:** This feature became available on February 29, 2024.

**How:** Use the menu dropdown to work on current deals without leaving the record.



SEE ALSO:

[Work Efficiently with Sales Cloud Everywhere](#)

[Salesforce Help: Sales Cloud Everywhere \(can be outdated or unavailable during release preview\)](#)

## Follow Up on Companies of Interest with Contextual Insights

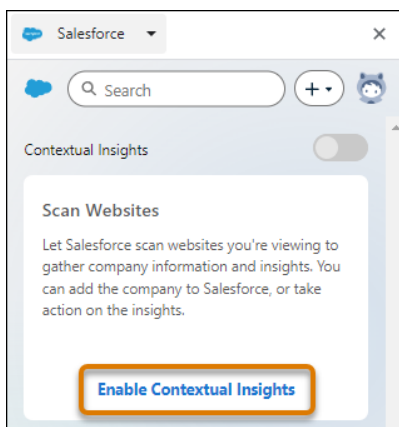
While looking for future customers, your sales reps research companies on the internet. Now your company's Salesforce database can keep up with the sales research by checking the website they're viewing and seeing if info on that company is available. When a match occurs with data in Salesforce, reps can view what's saved or see additional matches and suggestions. Or, reps can add the company as a new account to keep pursuing them as a potential customer.

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

**How:** In Lightning Experience, contextual insights are in the Sales Cloud Everywhere Chrome extension side panel. In Salesforce Outlook or Gmail integrations, users see contextual insights in the email application pane.

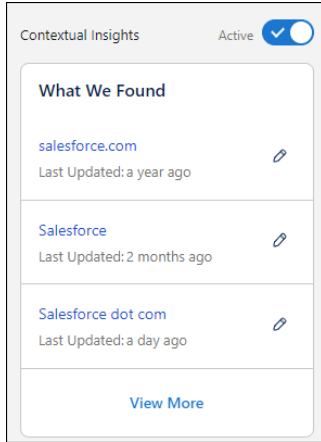
First, admins enable Gmail integration and turn on Use Salesforce Across the Web. Then admins ask the reps to install the extension.

The contextual insights feature appears automatically. To start contextual insights, reps enable it.

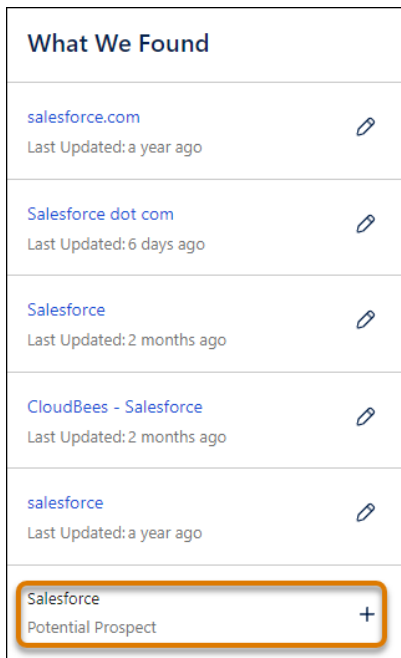


As soon as it's enabled, Salesforce examines the active website while the rep uses the internet.

If the company matches a Salesforce account, the rep views the details in the Salesforce database.

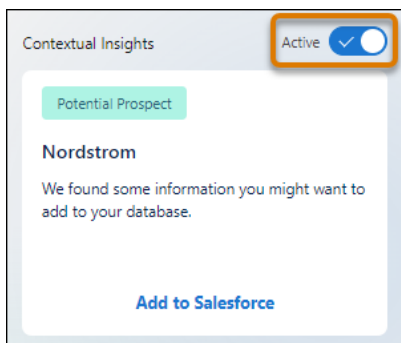



If information about a company is found, but doesn't match a Salesforce account, add it to Salesforce. Then reps can do further follow-up.



If no company information is found, the rep creates an account from scratch if they want to do further follow-up.

A rep can pause and resume contextual insights at any time.



 **Note:** The contextual insights feature is supported in English only.

SEE ALSO:

[Follow Up on People of Interest with Contextual Insights](#)

*Salesforce Help: Follow Up on Companies and People of Interest with Contextual Insights in Sales Cloud Everywhere (can be outdated or unavailable during release preview)*

## Follow Up on People of Interest with Contextual Insights

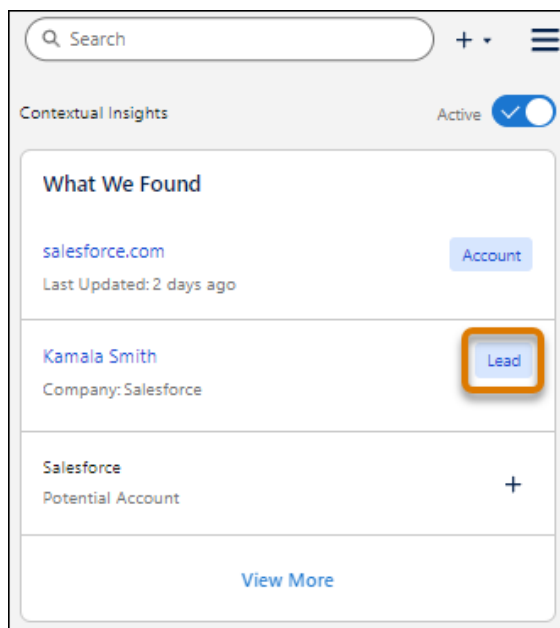
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**Where:** This change applies to Lightning Experience in Starter, Enterprise, Performance, Unlimited, and Developer editions.

**When:** This feature became available on February 29, 2024.

**How:** In Lightning Experience, contextual insights are in the Sales Cloud Everywhere Chrome extension side panel. Admins enable Everywhere and then ask the reps to install the extension. The contextual insights feature appears automatically.

To start contextual insights, reps enable it.



When it's enabled, Salesforce examines the active website while the rep uses the internet.

SEE ALSO:

[Follow Up on Companies of Interest with Contextual Insights](#)

*Salesforce Help: Follow Up on Companies and People of Interest with Contextual Insights in Sales Cloud Everywhere (can be outdated or unavailable during release preview)*

## Update Data for Many Records in Workspace

Save time by updating the same field in multiple records simultaneously.

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

**How:** In your workspace, select up to 20 rows. In this example, we chose the four rows for the Boy Scouts of the Southwest account.

Workspace

Move my deals forward Manage my accounts Work my contacts Qualify my latest leads test Lead 2 Opportunity 2 + New Workspace

Welcome, Ian. We're showing 16 record(s) sorted by Close Date in Newest to Oldest order. You're seeing records that you own.  
4 of 20 rows selected.

<input type="checkbox"/>	Account Name ID	Name	Amount	Close ...	Stage
<input checked="" type="checkbox"/>	Boy Scouts of the Southwest	Opp 4	USD 350,000.00	Nov 15, 2023	Id. Decision Makers
<input checked="" type="checkbox"/>	Boy Scouts of the Southwest	Opp 3	USD 26,500.00	Oct 3, 2023	Needs Analysis
<input checked="" type="checkbox"/>	Boy Scouts of the Southwest	Opp 1	USD 550,000.00	Nov 2, 2023	Needs Analysis
<input type="checkbox"/>	Saito Family Laundromats.	Saito - Ground-mounted Panels	JPY 4,747,500 (USD 42,013.27)	Aug 31, 2023	Prospecting
<input type="checkbox"/>	Demo	Jet Engines	USD 17,632.00	Aug 31, 2023	Prospecting
<input type="checkbox"/>	Demo	Cars	USD 4,360,000.00	Aug 31, 2023	Prospecting
<input checked="" type="checkbox"/>	Boy Scouts of the Southwest	BSofSW - Ground-mounted Panels	USD 18,000.00	Nov 7, 2023	Prospecting

You want to make the close date the same for all the opportunities. Change the field value in one row and press Enter. The field in every selected row changes to that new value.

Workspace

Move my deals forward Manage my accounts Work my contacts Qualify my latest leads test Lead 2 Opportunity 2 + New Workspace

Welcome, Ian. We're showing 16 record(s) sorted by Close Date in Newest to Oldest order. You're seeing records that you own.  
4 of 20 rows selected.

<input type="checkbox"/>	Account Name ID	Name	Amount	Close ...	Stage
<input checked="" type="checkbox"/>	Boy Scouts of the Southwest	Opp 4	USD 350,000.00	Nov 17, 2023	Id. Decision Makers
<input checked="" type="checkbox"/>	Boy Scouts of the Southwest	Opp 3	USD 26,500.00	Nov 17, 2023	Needs Analysis
<input checked="" type="checkbox"/>	Boy Scouts of the Southwest	Opp 1	USD 550,000.00	Nov 17, 2023	Needs Analysis
<input type="checkbox"/>	Saito Family Laundromats.	Saito - Ground-mounted Panels	JPY 4,747,500 (USD 42,013.27)	Aug 31, 2023	Prospecting
<input type="checkbox"/>	Demo	Jet Engines	USD 17,632.00	Aug 31, 2023	Prospecting
<input type="checkbox"/>	Demo	Cars	USD 4,360,000.00	Aug 31, 2023	Prospecting
<input checked="" type="checkbox"/>	Boy Scouts of the Southwest	BSofSW - Ground-mounted Panels	USD 18,000.00	Nov 17, 2023	Prospecting

After you're done changing the value, click the unselect icon above the row selection boxes. Unselecting the rows prevents accidental data changes.

SEE ALSO:

[Salesforce Help: Quickly Update Multiple Records in Sales Cloud Everywhere with Workspace \(can be outdated or unavailable during release preview\)](#)

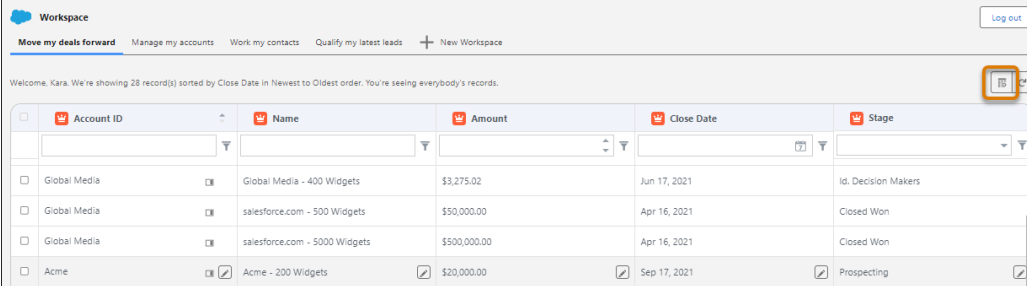
## Focus on the Right Records and Personalize Your Workspace

Your sales reps don't need to wade through extra, unwanted records. Instead they can create a workspace to filter their records and focus only on the data they need. With a personalized targeted workspace with fewer records, they can get right to work.

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

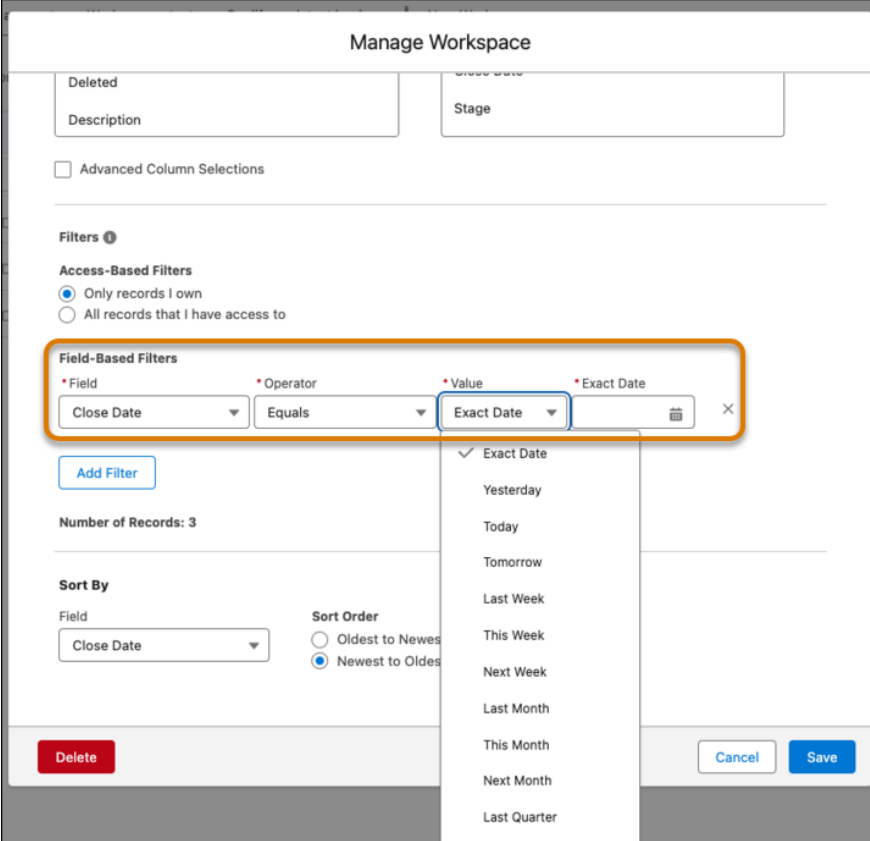
**When:** This feature is available beginning April 18, 2024.

**How:** Open workspace from Sales Cloud Everywhere.



Account ID	Name	Amount	Close Date	Stage
Global Media	Global Media - 400 Widgets	\$3,275.02	Jun 17, 2021	Id. Decision Makers
Global Media	salesforce.com - 500 Widgets	\$50,000.00	Apr 16, 2021	Closed Won
Global Media	salesforce.com - 5000 Widgets	\$500,000.00	Apr 16, 2021	Closed Won
Acme	Acme - 200 Widgets	\$20,000.00	Sep 17, 2021	Prospecting

Click **Manage Workspace**.



**Manage Workspace**

Deleted: Description, Stage

Advanced Column Selections

**Filters**

**Access-Based Filters**

Only records I own  
 All records that I have access to

**Field-Based Filters**

Field: Close Date, Operator: Equals, Value: Exact Date, Exact Date

Number of Records: 3

**Sort By**

Field: Close Date, Sort Order:  Oldest to Newest,  Newest to Oldest

Exact Date  
 Yesterday  
 Today  
 Tomorrow  
 Last Week  
 This Week  
 Next Week  
 Last Month  
 This Month  
 Next Month  
 Last Quarter

Delete, Cancel, Save

Add filters based on field values. For example, maybe you want to see all the opportunities that close on a certain date, or next week.

All the filters work together to narrow which records are shown.

SEE ALSO:

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

## Get the Power of Copilot in Sales Cloud Everywhere

Bring the power of conversational AI to Sales Cloud Everywhere with Einstein Copilot. Einstein Copilot is a generative AI-powered assistant that helps your employees accomplish key business tasks just by asking, such as summarizing records and drafting emails. Available in the Salesforce Chrome extension side panel, Sales Cloud Everywhere lets you work with Salesforce without leaving the web page you're on.

**Where:** This change applies to Lightning Experience in Starter, Enterprise, Performance, Unlimited, and Developer editions with the Einstein for Sales, Einstein for Service, or Einstein Platform add-on. Einstein generative AI is available in Lightning Experience.

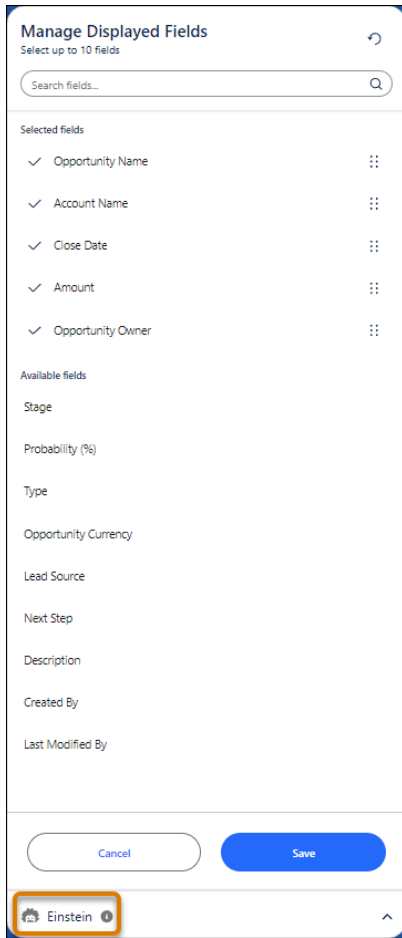
To purchase the Einstein for Sales, Einstein for Service, or Einstein Platform add-on, contact your Salesforce account executive.

**When:** Einstein Copilot was available for Sales Cloud Everywhere starting February 29, 2024. This feature became generally available on April 11, 2024.

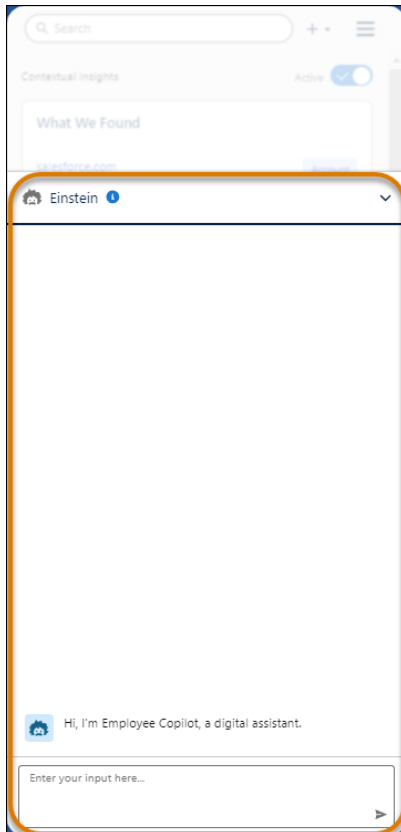
**How:** Before you get started with Einstein Copilot, enable Einstein generative AI. Then turn on Einstein Copilot for Salesforce from the Einstein Copilots page in Setup. After you enable Einstein Copilot, your new copilot is available on the Einstein Copilots page.

To launch your copilot to your users, from the Copilot Builder, activate your copilot. When you activate your copilot, the Einstein panel is docked in the Einstein footer in Sales Cloud Everywhere.





To expand the footer, click **Einstein**.

**SEE ALSO:**

[Einstein Copilot](#)

[Einstein Features](#)

[Salesforce Help: Set Up Einstein Copilot](#)

[Salesforce Help: Enable and Disable the Salesforce Everywhere Chrome Extension \(can be outdated or unavailable during release preview\)](#)

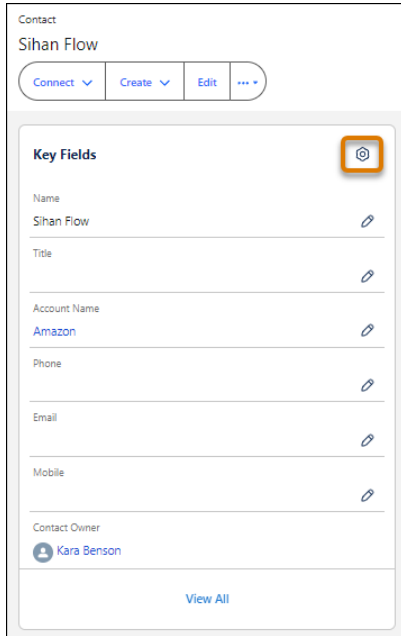
## See the Fields You Want in Sales Cloud Everywhere

As your sales reps use Sales Cloud Everywhere, they can choose the fields they want to see and arrange them the way they want to work.

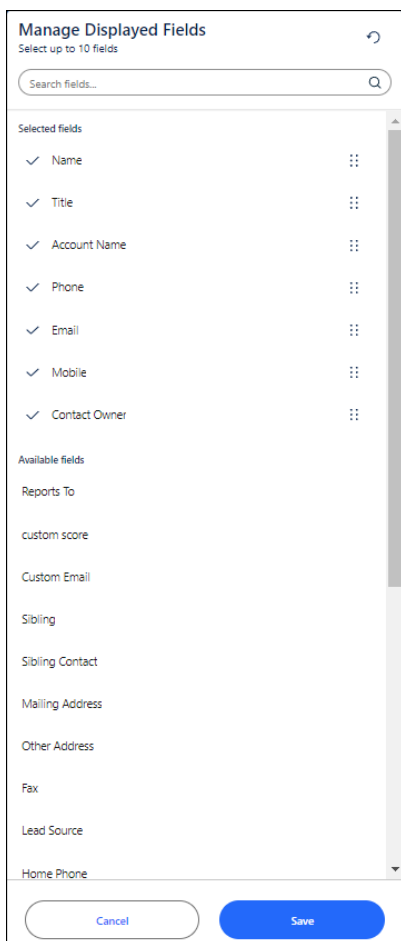
**Where:** This change applies to Lightning Experience in Starter, Enterprise, Performance, Unlimited, and Developer editions.

**When:** This feature is available beginning April 18, 2024.

**How:** In Sales Cloud Everywhere, go to an opportunity, contact, account, or lead page. Select a record to go to the detail page.



In the Key Fields section, click the edit gear.



Add any available fields to the key fields section and remove the fields that aren't important to you. Update the order of the fields, if needed, and save your choices.

SEE ALSO:

[Salesforce Help: Enable and Disable the Salesforce Everywhere Chrome Extension \(can be outdated or unavailable during release preview\)](#)

## Salesforce Meetings

Use Salesforce Meetings to enhance your interactions with prospects and customers. Ensure everyone is aligned before a meeting starts by seeing valuable meeting information with the Meeting Digest.

[Set Up Meeting Options More Easily in Sales Engagement Setup](#)

New options in Sales Engagement Setup help you make the most of your meetings.

[Meeting Studio Is Being Retired](#)

Meeting Studio is being retired with Spring '24.

## Set Up Meeting Options More Easily in Sales Engagement Setup

New options in Sales Engagement Setup help you make the most of your meetings.

**Why:** Sales Engagement features work with related functionality in Salesforce, such as inserting suggested meeting times in an email and using Salesforce Meetings.

Get Started with Sales Engagement

Accelerate your sales teams with a system of action and engagement, right where your reps work. You will sell faster by unlocking capabilities that enable your teams to connect with customers at scale. Meet customers wherever they are, across Salesforce or other channels. Use the power of automation to guide and speed up every touchpoint. Confidently make the next move with insights and tasks served up at the right time in order to make every moment count.

To set up Sales Engagement, review and complete settings for each business capability below.

Engage
Automate
Email
Call
Meet
Guide

**Meet**

Help your teams get the most out of their meetings with Meeting Digest and Microsoft Teams.

**Meeting Digest**

Help your users deliver the most productive meetings with Meeting Digest. Includes an enhanced event layout. [Review Activity sync requirements and available features with each solution.](#) [Set Up](#)

**Microsoft Teams**

Let sales reps access Salesforce Meetings directly from Microsoft Teams. [Set Up](#)


**1 Meeting Availability**

To let Salesforce suggest meeting times, tell your users to set their availability in Meetings Settings in their personal settings. [Learn More](#)

**2 Add Meeting Digest to the Event Page Layout**

Edit your customized event page layouts to include the Meeting Digest component. [Go to Lightning Record Page](#)

When Salesforce suggests meeting times to include in an email, meeting availability (1) determines what times are suggested. Make sure your users set their availability.

 **Note:** Using this feature requires Inbox.

With Salesforce Meetings, you see the Meeting Digest tab on the event detail record. Use the features in the Meeting Digest component (2) to prepare yourself and your teammates before a meeting or event. The component is added automatically if the event detail record page isn't customized.

## Meeting Studio Is Being Retired

Meeting Studio is being retired with Spring '24.

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

**When:** Full product retirement for Meeting Studio is scheduled for Spring '24.

**How:** With Spring '24, you can't access or use Meeting Studio. Replace Meeting Studio with other video conferencing tools, such as Google Meet, Microsoft Teams, Zoom, and WebEx.

Your Salesforce data isn't impacted because it's not stored or captured in Meeting Studio. 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](#)

## Other Changes in the Sales Cloud

Learn about other changes we've made for Spring '24.

### [Marketing App Was Renamed](#)

To support new Marketing features in Salesforce, the classic app called Marketing was renamed to Marketing CRM Classic. The app still provides access to CRM objects such as leads and campaigns and is accessible through the App Launcher.

### [Social Accounts, Contacts, and Leads Was Retired](#)

Social Accounts, Contacts, and Leads was retired. To continue showing social profiles in Salesforce, find apps on AppExchange.

### [Enable New Order Save Behavior \(Release Update\)](#)

After the New Order Save Behavior is enabled, whenever an order product update causes a change to the parent order, Salesforce runs custom application logic. Previously, in this scenario, Salesforce didn't correctly evaluate custom application logic on the parent record.

## Marketing App Was Renamed

To support new Marketing features in Salesforce, the classic app called Marketing was renamed to Marketing CRM Classic. The app still provides access to CRM objects such as leads and campaigns and is accessible through the App Launcher.

**Where:** This change applies to all editions except Starter. It's available in Salesforce Classic and Lightning Experience.

## Social Accounts, Contacts, and Leads Was Retired

Social Accounts, Contacts, and Leads was retired. To continue showing social profiles in Salesforce, find apps on AppExchange.

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

SEE ALSO:

[AppExchange](#)

## Enable New Order Save Behavior (Release Update)

After the New Order Save Behavior is enabled, whenever an order product update causes a change to the parent order, Salesforce runs custom application logic. Previously, in this scenario, Salesforce didn't correctly evaluate custom application logic on the parent record.

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

**When:** This update was first available in Winter '20 and is enforced in Winter '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 review this update, from Setup, in the Quick Find box, enter *Release Updates*, and then select **Release Updates**.

After the New Order Save Behavior is enabled, whenever an order product update causes a change to the parent order, Salesforce runs custom application logic. Custom application logic consists of validation rules, Apex triggers and classes, workflow rules, and flows. Previously, in this scenario, Salesforce didn't correctly evaluate custom application logic on the parent record.

Packages with orders created before Winter '21 don't support the New Order Save Behavior release update by default. If you use a package involving orders, wait for confirmation from your package provider before enabling the release update.

## Salesforce CMS

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Create content publication schedules and preview content in Salesforce CMS.

### [Schedule Content to Publish and Unpublish in Enhanced CMS Workspaces](#)

Create schedules for your Salesforce CMS content to publish and unpublish on designated dates and at specific times. With content publication schedules, you can manage the content lifecycle more conveniently, without manually publishing and unpublishing each piece of content immediately. The workflow to publish or unpublish immediately or schedule content is now streamlined into one process.

### [Preview Content in Enhanced CMS Workspaces](#)

Preview only news, image, and document content types on your enhanced LWR site, before or after you publish. Use the view mode to change from desktop to mobile devices to see how content appears for site visitors.

### [Work Smarter with Upgrades to CMS Workflows](#)

To make your processes more flexible, you can now cancel a running workflow in your enhanced CMS workspaces. From the settings dropdown on the Workflows component, select Cancel. After you cancel the current workflow, you can start a new one.

## Schedule Content to Publish and Unpublish in Enhanced CMS Workspaces

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

**How:** From the content detail page, click **Publish** or **Unpublish**. Then choose to publish or unpublish now, or create a publication schedule. View and manage content publication schedules from the enhanced CMS workspace Publication Calendar tab or the Publication Activity tab on the content detail page.

## Preview Content in Enhanced CMS Workspaces

Preview only news, image, and document content types on your enhanced LWR site, before or after you publish. Use the view mode to change from desktop to mobile devices to see how content appears for site visitors.

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

**How:** Add your enhanced LWR site as a channel to your enhanced CMS workspace. Then, in Experience Builder, configure a CMS content detail page on the site. To give workspace contributors access to preview, add them as site contributors. To preview content in an enhanced CMS workspace, open the content detail page, and click **Preview**.

SEE ALSO:

[Salesforce Help: Preview Salesforce CMS Content on Your Site \(can be outdated or unavailable during release preview\)](#)

## Work Smarter with Upgrades to CMS Workflows

To make your processes more flexible, you can now cancel a running workflow in your enhanced CMS workspaces. From the settings dropdown on the Workflows component, select Cancel. After you cancel the current workflow, you can start a new one.

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

## Salesforce Flow

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Compose intelligent workflows with Flow Builder and Flow Orchestration. Integrate across any system with Flow Integration.

### [Flow Integration](#)

MuleSoft Composer for Salesforce 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](#)

Use a template-triggered prompt flow to integrate flows with Prompt Builder. Send data to Data Cloud with flows. Create multiple instances of fields with the new Repeater screen component. Transform data in new ways with data aggregation. Debug Data Cloud-triggered flows. Manage your MuleSoft Anypoint Platform Connection (beta).

### [Flow Orchestration](#)

Control who to run a background or MuleSoft step as. Use Flow Orchestration custom reports. Disable default email notifications to people who have been assigned work items and send custom notifications.

## Flow Integration

MuleSoft Composer for Salesforce 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:** MuleSoft Composer 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

Use a template-triggered prompt flow to integrate flows with Prompt Builder. Send data to Data Cloud with flows. Create multiple instances of fields with the new Repeater screen component. Transform data in new ways with data aggregation. Debug Data Cloud-triggered flows. Manage your MuleSoft Anypoint Platform Connection (beta).

### [Flow Builder Updates](#)

Use template-triggered prompt flows to generate output data for use in Prompt Builder. Send data to Data Cloud with flows. Verify API connections with HTTP Callout. Create multiple instances of fields with the new Repeater screen component. Transform data in new ways with data aggregation. In screen flows, use Display Text and Long Text area components to react to changes on the same screen at run time. And use text templates to react to changes on the same screen at run time. Validate the values that a user enters, and provide error messages for more screen flow components.

### [Flow Testing and Debugging](#)

Debug Data Cloud-Triggered flows in Flow Builder.

### [Flow Runtime](#)

Search a data table multiple times without worrying about losing your previous selections.

### [Flow and Process Management](#)

Get an overview of flow version and flow occurrence performance for segment-triggered flows. Migrate more processes to flows. Delete workflow rules from managed packages. Identify which flows contain email alerts.

### [Flow Extensions](#)

Manage your MuleSoft Anypoint Platform Connection (beta). Enter custom user input validations for screen extension components. Map unsupported media types to supported media types in MuleSoft Services.

### [Flow and Process Release Updates](#)

Salesforce Flow has several release updates that are scheduled to be enforced in future releases.

## Flow Builder Updates

Use template-triggered prompt flows to generate output data for use in Prompt Builder. Send data to Data Cloud with flows. Verify API connections with HTTP Callout. Create multiple instances of fields with the new Repeater screen component. Transform data in new ways with data aggregation. In screen flows, use Display Text and Long Text area components to react to changes on the same screen at run time. And use text templates to react to changes on the same screen at run time. Validate the values that a user enters, and provide error messages for more screen flow components.

### [Provide Data to Einstein with Template-Triggered Prompt Flows](#)

Now you can build a template-triggered prompt flow in Flow Builder that integrates with a prompt template in Prompt Builder. The flow performs dynamic logic and actions to generate output text that's merged into the associated prompt template's resolution.

### [Send Data to Data Cloud using Flows](#)

Use actions to send data from a flow to Data Cloud through Ingestion API without writing any code. For example, use the Send Data to Data Cloud action in a flow to create an automation that automatically sends archival data to Data Cloud, or use it in a screen flow that sends engagement data directly to Data Cloud.



### [Verify Your API Connection via HTTP Callout](#)

When configuring the API response for a new HTTP Callout, you now have the option to choose Connect for Schema. Selecting Connect for Schema establishes a connection to the API endpoint and retrieves an accurate, real-time sample response body. The response from the selected system is then used to automatically configure the HTTP Callout.

### [Create Multiple Instances of a Set of Fields with the New Repeater Component \(Beta\)](#)

Add a set of components to a screen, and enable your users to duplicate the set of components at run time with the new Repeater component. For example, use a Repeater component to collect information about beneficiaries on an insurance policy. When a user runs the flow and reaches the screen, the user can add as many beneficiaries as needed. You can then loop through and save the list of beneficiaries to use later in the flow.

### [Sum or Count Items in Collections More Easily with the Transform Element \(Beta\)](#)

Transform collections of data between flow resources with the Transform element in Flow Builder. The Transform element includes some changes since the last release. Now you can aggregate data from a source collection to calculate the sum or count of items in that collection and assign the result to a target data field. You can also enter a fixed value for a target data field.

### [Use More Components to React to Changes on the Same Screen \(Generally Available\)](#)

Configure a Display Text component or a Long Text component to react to changes in other components on the same screen. For example, you can have a Currency component, where a user enters the wholesale cost of an item, and a Display Text component that calculates the retail price of the item from the wholesale price. Each time the user updates the wholesale cost, the flow updates the displayed retail cost. This feature, now generally available, includes visual enhancements added since the previous release. For example, decimal places, commas, currency symbols, and date formats are displayed correctly at run time.

### [Use Text Templates to React to Changes on the Same Screen](#)

Text Template resources that reference the output of a component on the same screen can now respond in real time to changes in the output. For example, consider a Text Template resource that references the output of a Name component on the same screen. If you include the Text Template in a Display Text component, the flow updates the displayed text each time the user changes the Name component at run time.

### [Validate User Input for More Screen Components](#)

You can now validate the values that a user enters for more screen flow components, including Name, Address, and Data Table. You can also provide error messages to guide the user when a validation error occurs. Components that render choice resources, such as the Radio Buttons component, don't support input validation.

### [Wait for Engagement Events in Segment-Triggered Flows with the Wait Until Event Element](#)

With the new Wait Until Event element, you can resume flows based on email and SMS engagements. For example, you can resume a flow when a user opens an email or SMS, or clicks a specific link.

### [Run Event-Triggered Flows as Workflow User](#)

Select whether to run event-triggered flows as the user that triggered the flow or as your org's specified default workflow user. If you select the default workflow user, any changes triggered by the flow are attributed to the default workflow user, regardless of who triggered the flow.

### [Save the Progress of Your Flow as You Build Expanded to More Elements](#)

With this update, you can save your flow at any point in the building process without finishing the configuration for all elements except for Screens and Action. Required values don't need to be completed. Errors that previously prevented you from saving your flow are now warnings.

### [Find and Select Flow Resources More Easily in More Elements](#)

With this update, Flow Builder extends the enhanced resource selection experience beyond Create Records to the Delete Records, Get Records, and Update Records elements. The improved grouping makes it easier for you to scroll through and find the resources that you need. User-friendly labeling for resources enables faster troubleshooting.

### [Use Predictions from Your AI Models in Flows](#)

Use Flow Builder actions to consume predictions from your AI models. When the model is activated, the scoring of records and the outputs provide actionable insights that you can use for decision-making.

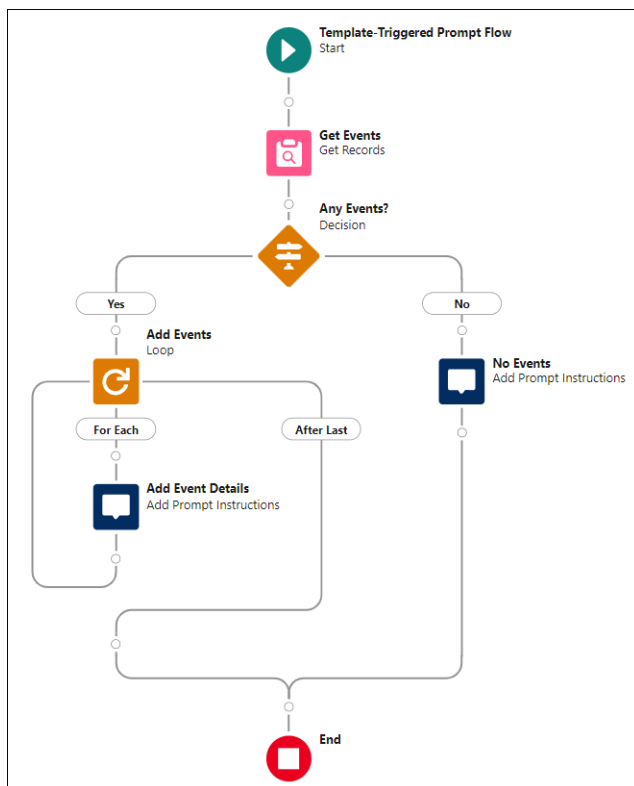
## Provide Data to Einstein with Template-Triggered Prompt Flows

Now you can build a template-triggered prompt flow in Flow Builder that integrates with a prompt template in Prompt Builder. The flow performs dynamic logic and actions to generate output text that's merged into the associated prompt template's resolution.

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

**Who:** To use the template-triggered prompt flow in Enterprise and Unlimited editions, you must purchase the Einstein for Sales, Einstein for Platform, or Einstein for Service add-on. Reach out to your account executive for more information. Template-triggered prompt flows aren't compatible with prompt templates created in Winter '24.

**Why:** For example, you can create a prompt template that explains how to write an invitation email for company events nearby a contact's location. The prompt template can trigger a flow that generates a list of company events near the contact. Depending on your Salesforce data, the prompt template adds either no events or the list of company events in the prompt template's resolution.



**How:** You can integrate template-triggered prompt flows with prompt templates beginning with the Spring '24 release of Prompt Builder. From Flow Builder, create a template-triggered prompt flow. Select a prompt template type, which is associated with a prompt template type in Prompt Builder. Configure the flow with the new Add Prompt Instructions element, and save the flow. When you preview the prompt template in Prompt Builder, it triggers the flow.

SEE ALSO:

[Simplify Daily Tasks with Prompt Builder \(Generally Available\)](#)

[Salesforce Help: Example of Sales Email Template-Triggered Prompt Flow](#)

## Send Data to Data Cloud using Flows

Use actions to send data from a flow to Data Cloud through Ingestion API without writing any code. For example, use the Send Data to Data Cloud action in a flow to create an automation that automatically sends archival data to Data Cloud, or use it in a screen flow that sends engagement data directly to Data Cloud.

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

**How:** First, create and configure Ingestion API connectors in Data Cloud. Next, add a Send to Data Cloud action to your flow. A unique invocable action is provided for each Ingestion API connector schema.

The screenshot shows the 'New Action' configuration interface. On the left, a 'Filter By' dropdown is set to 'Category', and a list of categories is shown, with 'Send to Data Cloud' highlighted. Below the list is a '+ Create HTTP Callout' button. The main area displays the configuration for the 'Flow Runs.FlowElementRun' action. It includes a search bar, a description field, and a section titled 'Set Input Values for the Selected Action' with several toggle switches, all of which are currently turned off. The toggles are: CompletedDateTime, ErrorDescription, ErrorReason, FlowElementId, FlowElementRunStatus, FlowRunId, Id, and ScheduledDateTime. At the bottom right, there are 'Cancel' and 'Done' buttons.

## Verify Your API Connection via HTTP Callout

When configuring the API response for a new HTTP Callout, you now have the option to choose Connect for Schema. Selecting Connect for Schema establishes a connection to the API endpoint and retrieves an accurate, real-time sample response body. The response from the selected system is then used to automatically configure the HTTP Callout.

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

**How:** In Flow Builder, add the Action element, then click **Create HTTP Callout**. Name and select the named credential that authorizes the connection between Salesforce and the API. Configure the HTTP callout method and details for the invocable action. Then select **Connect for Schema** and click **Next**. To create a real-time call to the system selected, click **Connect**.

**New HTTP Callout**

**Select Sample Response Method**

**Connect for Schema**

Establishes a connection to the API endpoint and retrieves a response, generating an accurate, real-time sample response.

**Use Example Response**

Configure the sample response by pasting an example API response without establishing a real-time connection to the API endpoint.

Previous
Next

**New HTTP Callout**

**Connect with Sample Response**

When you click Connect, you create a real-time call to the system you selected. The response from the selected system is used to configure the HTTP Callout.

Description

URL Path  ⓘ      HTTP Callout Method


https://api.restful-api.dev/objects/{id}      GET

**Data Structure**

Set URL Path Values

Set the key values that complete the URL path to access the external data.

Key	Value
id	# integer
* Value	<input style="width: 90%;" type="text"/>


  
**No sample JSON**  
 To view sample data, click Connect.

Connect

Previous
Save

SEE ALSO:

[Salesforce Help: Configure an HTTP Callout Action](#)

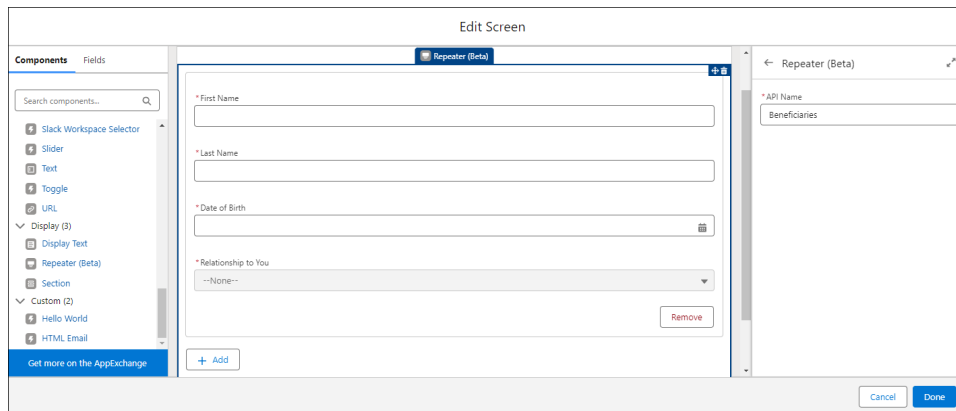
## Create Multiple Instances of a Set of Fields with the New Repeater Component (Beta)

Add a set of components to a screen, and enable your users to duplicate the set of components at run time with the new Repeater component. For example, use a Repeater component to collect information about beneficiaries on an insurance policy. When a user runs the flow and reaches the screen, the user can add as many beneficiaries as needed. You can then loop through and save the list of beneficiaries to use later in the flow.

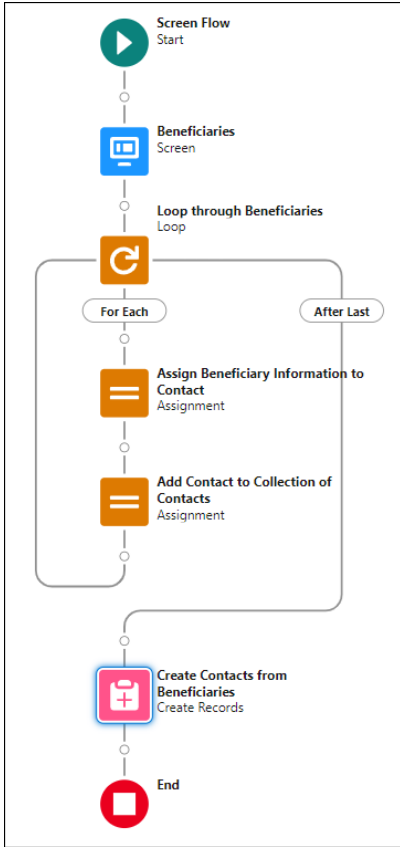
 **Note:** This feature is a Beta Service. Customer may opt to try such Beta Service in its sole discretion. Any use of the Beta Service is subject to the applicable Beta Services Terms provided at [Agreements and Terms](#).

**Where:** This change applies to Lightning Experience and Salesforce Classic in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions. It's supported only in Lightning runtime for flows.

**How:** In Flow Builder, create a screen flow. Then, add a Screen element to the flow that includes a Repeater component. Add child components to the Repeater component. For example, to collect the first name, last name, date of birth, and relationship for a beneficiary on an insurance policy, add Text, Date, and Picklist components to a Repeater component.



After the Screen element, add a Loop element to loop through and save the list of beneficiaries in a variable that you can use elsewhere in the flow. For example, you can use the variable to create a Contact record for each beneficiary.



Save and run the flow.

\* First Name  
John

\* Last Name  
Shah

\* Date of Birth  
Dec 13, 2023

\* Relationship to You  
Spouse  
Remove

\* First Name  
Jane

\* Last Name  
Shah

\* Date of Birth  
Aug 17, 2010

\* Relationship to You  
Child  
Remove

+ Add

Pause Next

The Repeater component supports these child components: Checkbox, Checkbox Group, Currency, Date, Date & Time, Long Text Area, Multi-Select Picklist, Number, Password, Picklist, Radio Buttons, Text, and Display Text

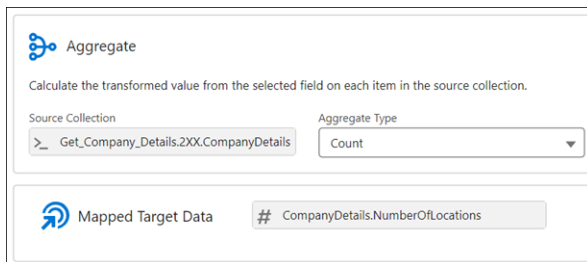
## Sum or Count Items in Collections More Easily with the Transform Element (Beta)

Transform collections of data between flow resources with the Transform element in Flow Builder. The Transform element includes some changes since the last release. Now you can aggregate data from a source collection to calculate the sum or count of items in that collection and assign the result to a target data field. You can also enter a fixed value for a target data field.

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

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

**Why:** The Transform element can count the number of items in a source collection. For example, let's say you create a flow that retrieves data about company locations from an external system. The external data includes company locations and the number of employees per location. In the flow, you add and configure the Transform element to count the number of company locations.

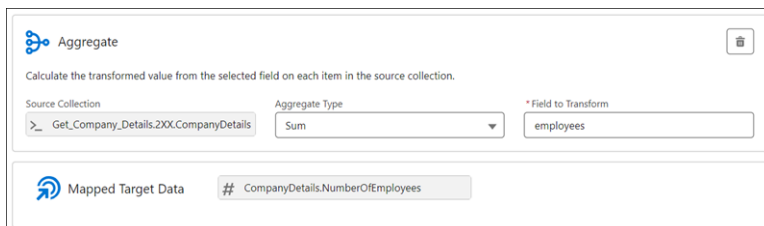


**Aggregate**  
Calculate the transformed value from the selected field on each item in the source collection.

Source Collection: >\_ Get\_Company\_Details.2XX.CompanyDetails  
Aggregate Type: Count

Mapped Target Data: # CompanyDetails.NumberOfLocations

And you configure the Transform element to calculate the sum of employees for all company locations.



**Aggregate**  
Calculate the transformed value from the selected field on each item in the source collection.

Source Collection: >\_ Get\_Company\_Details.2XX.CompanyDetails  
Aggregate Type: Sum  
\* Field to Transform: employees

Mapped Target Data: # CompanyDetails.NumberOfEmployees

Previously, you used the Assignment element to calculate the number of locations. You used the Loop and Assignment elements to calculate the sum of employees per company location.

**How:** To start calculating the sum or count of items in a collection in Flow Builder, add the Transform element to the flow canvas.

SEE ALSO:

[Salesforce Help: Sum or Count Items in Collections with the Transform Element \(Beta\) \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Flow Element: Transform \(Beta\) \(can be outdated or unavailable during release preview\)](#)

## Use More Components to React to Changes on the Same Screen (Generally Available)

Configure a Display Text component or a Long Text component to react to changes in other components on the same screen. For example, you can have a Currency component, where a user enters the wholesale cost of an item, and a Display Text component that calculates the retail price of the item from the wholesale price. Each time the user updates the wholesale cost, the flow updates the displayed retail cost. This feature, now generally available, includes visual enhancements added since the previous release. For example, decimal places, commas, currency symbols, and date formats are displayed correctly at run time.

**Where:** This change applies to Lightning Experience and Salesforce Classic in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions. It's supported only in Lightning runtime for flows.

**How:** In Flow Builder, create a screen flow and add the Display Text or Long Text component to a screen. In the configuration pane, reference the output of another component on the same screen. Save and run the flow.

SEE ALSO:

[Salesforce Help: Reactive Screen Flow Components \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Make Your Screen Flows Reactive \(can be outdated or unavailable during release preview\)](#)

## Use Text Templates to React to Changes on the Same Screen

Text Template resources that reference the output of a component on the same screen can now respond in real time to changes in the output. For example, consider a Text Template resource that references the output of a Name component on the same screen. If you include the Text Template in a Display Text component, the flow updates the displayed text each time the user changes the Name component at run time.

**Where:** This change applies to Lightning Experience and Salesforce Classic in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions. It's supported only in Lightning runtime for flows.

**How:** In Flow Builder, create a screen flow and use a Text Template resource on a screen that references the output of a component on the same screen. Save and run the flow.

SEE ALSO:

[Salesforce Help: Reactive Screen Flow Components \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Make Your Screen Flows Reactive \(can be outdated or unavailable during release preview\)](#)

## Validate User Input for More Screen Components

You can now validate the values that a user enters for more screen flow components, including Name, Address, and Data Table. You can also provide error messages to guide the user when a validation error occurs. Components that render choice resources, such as the Radio Buttons component, don't support input validation.

**Where:** This change applies to Lightning Experience and Salesforce Classic in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions. It's supported only in Lightning runtime for flows.

**How:** In Flow Builder, create a screen flow and add a component to a screen. In the configuration pane, expand the Validate Input section and fill in the fields.

SEE ALSO:

[Salesforce Help: Validate User Input on Flow Screens \(can be outdated or unavailable during release preview\)](#)



## Wait for Engagement Events in Segment-Triggered Flows with the Wait Until Event Element

With the new Wait Until Event element, you can resume flows based on email and SMS engagements. For example, you can resume a flow when a user opens an email or SMS, or clicks a specific link.

**Where:** This feature is available in Lightning Experience for Salesforce Enterprise and Unlimited editions with Marketing Cloud Growth edition.

**How:** Open a segment-triggered flow in Flow Builder, then add a Wait Until Event element to the canvas. In the element's properties panel, select the event you want to monitor, which action and engagement resumes the flow, and configure the wait element's timeout path.

The screenshot shows the 'New Wait Until Event' configuration window. It includes the following fields and options:

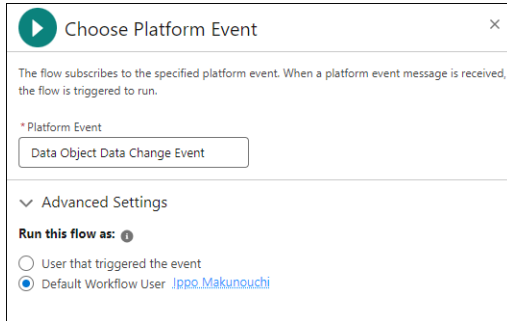
- Label:** Clicked Email Link
- API Name:** Clicked\_email\_Link
- Description:** (Empty text area)
- Select What to Monitor:**
  - Object:** Email (selected), SMS
- When to Resume the Flow:**
  - Flow Action to Monitor:** Send Welcome Email
  - Content Interaction:** Clicked Link
- Configure Timeout Path:**
  - Set Timeout Length:** Specify the maximum amount of time to pause the flow while it waits for a data change event.
  - Amount of Time:** 1 Weeks

## Run Event-Triggered Flows as Workflow User

Select whether to run event-triggered flows as the user that triggered the flow or as your org's specified default workflow user. If you select the default workflow user, any changes triggered by the flow are attributed to the default workflow user, regardless of who triggered the flow.

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

**How:** In the Start element of an event-triggered flow, expand the Advanced Settings section and select who to run the flow as. Running as the default workflow user can help if your flows fail due to mixing callouts and DML operations.

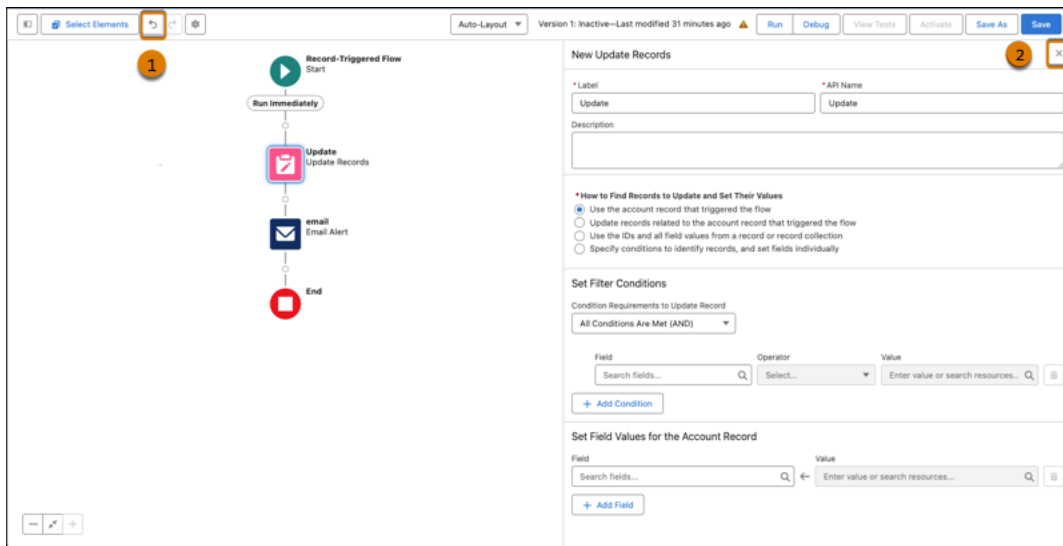


## Save the Progress of Your Flow as You Build Expanded to More Elements

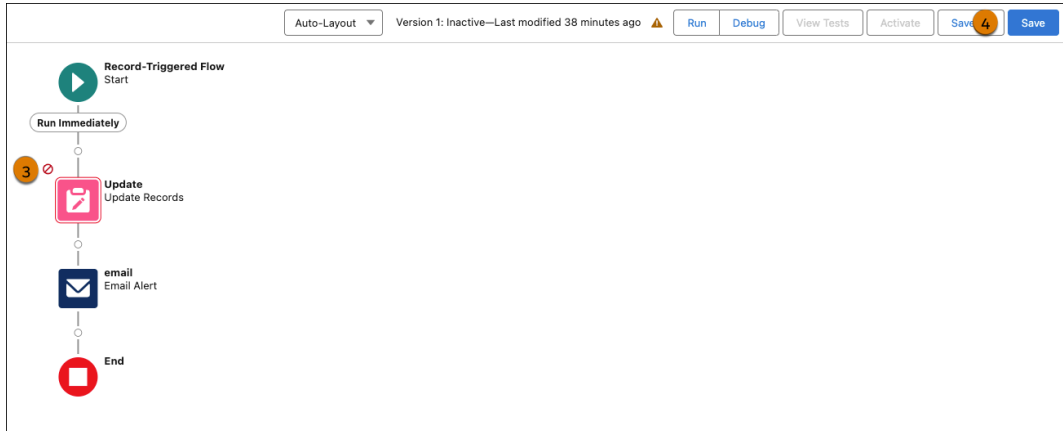
With this update, you can save your flow at any point in the building process without finishing the configuration for all elements except for Screens and Action. Required values don't need to be completed. Errors that previously prevented you from saving your flow are now warnings.


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

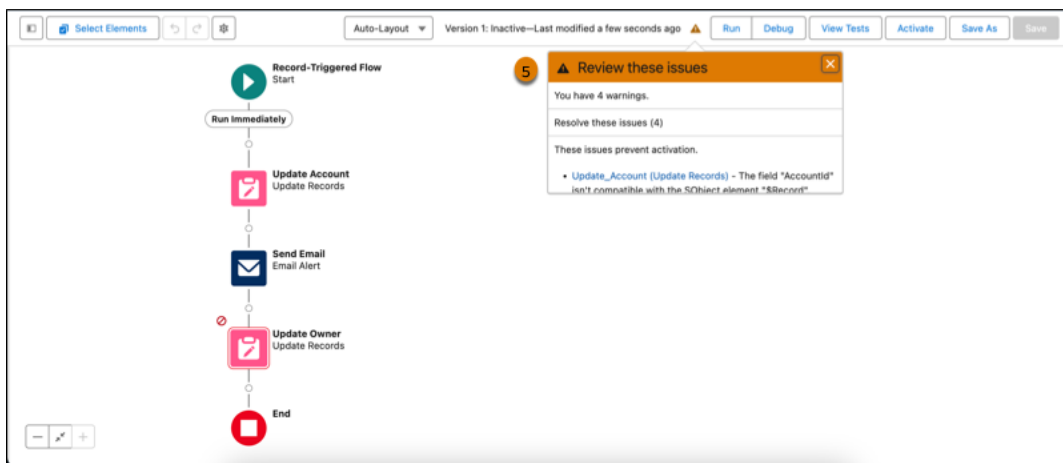
**How:** In Flow Builder, open an existing flow. Add any element except a Screen or Action. Start configuring the element. Field changes can be performed individually rather than in bulk for continuous editing. To undo your changes one at a time, click ↶ (1). Don't finish configuring your new element. To keep your changes and return to the canvas, click ✕ (2).



When you return to the canvas, your element that isn't fully configured is identified with the new error icon (3). Save your work (4).



Your flow is saved, despite errors that would have previously prevented saving. Now you receive warnings instead. Click  (5) to view the warnings.

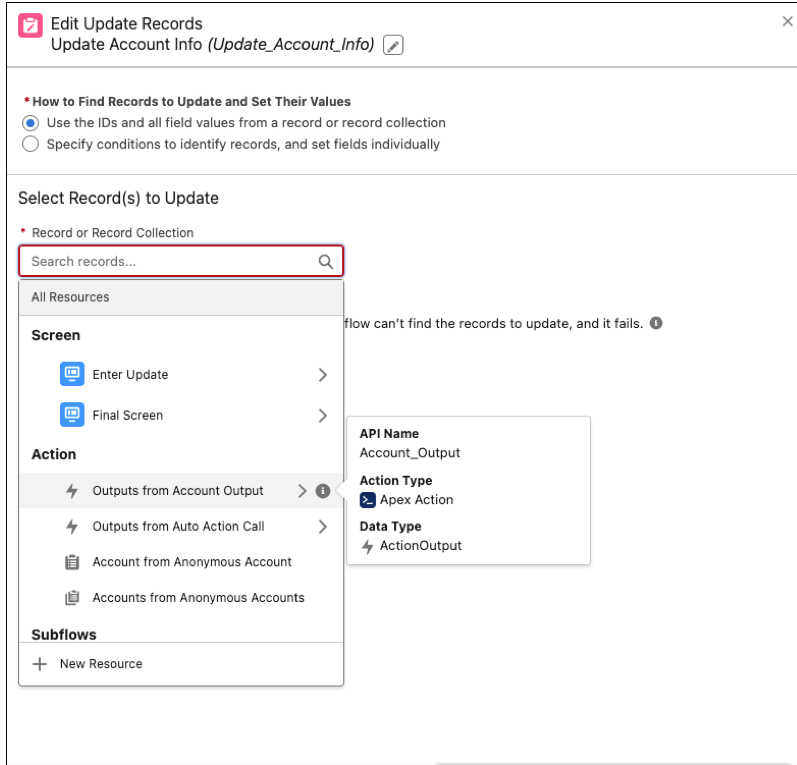


## Find and Select Flow Resources More Easily in More Elements

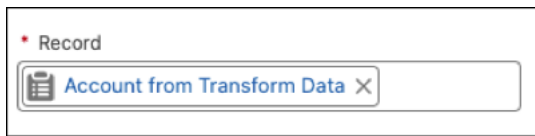
With this update, Flow Builder extends the enhanced resource selection experience beyond Create Records to the Delete Records, Get Records, and Update Records elements. The improved grouping makes it easier for you to scroll through and find the resources that you need. User-friendly labeling for resources enables faster troubleshooting.

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

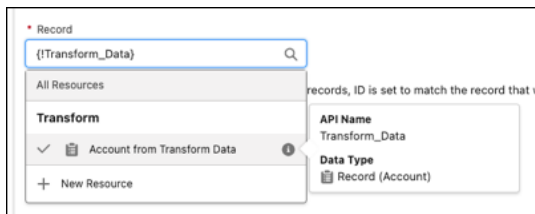
**How:** Open an existing flow, and then open or create an Update Records element. Click in the Record or Record Collection field.



Resource grouping now displays automatic outputs and variables with user-friendly labels under the elements in which they're created. To open a pill, click in a populated record, record collection, or resource field.



Your resource opens in context with a checkmark next to the selected item.

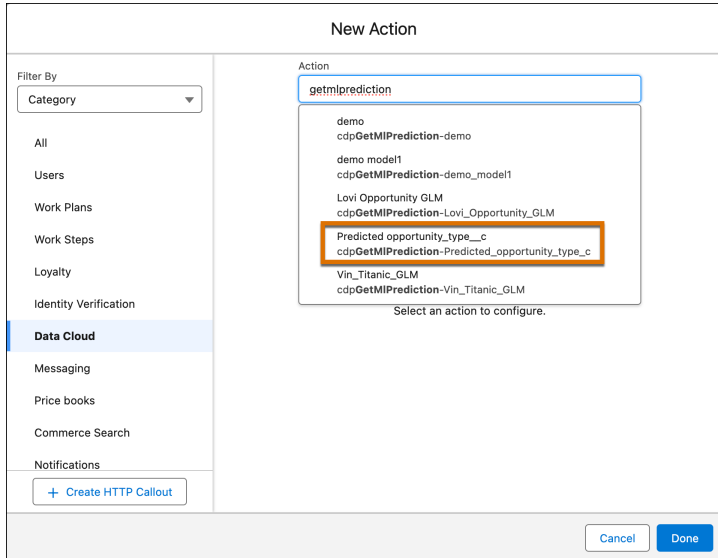


## Use Predictions from Your AI Models in Flows

Use Flow Builder actions to consume predictions from your AI models. When the model is activated, the scoring of records and the outputs provide actionable insights that you can use for decision-making.

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

**How:** Open an autolaunched flow in Flow Builder, then add an action that invokes the model endpoint.



SEE ALSO:

[Get Predictions from Your AI Models](#)

## Flow Testing and Debugging

Debug Data Cloud-Triggered flows in Flow Builder.

[Debug Data Cloud-Triggered Flows](#)

Test your flow's behavior and troubleshoot issues with the new Data Cloud-Triggered flow debug tool in Flow Builder. The debug tool lets you select an existing Data Cloud record to test for specific conditions without affecting your actual records.

### Debug Data Cloud-Triggered Flows

Test your flow's behavior and troubleshoot issues with the new Data Cloud-Triggered flow debug tool in Flow Builder. The debug tool lets you select an existing Data Cloud record to test for specific conditions without affecting your actual records.

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

**How:** Open a Data Cloud-Triggered flow in Flow Builder and click **Debug**. From there, select a triggering Data Cloud record, and then run the debugger.

## Flow Runtime

Search a data table multiple times without worrying about losing your previous selections.

### [Maintain Your Previous Selections When You Search a Data Table](#)

When a user searches in the Data Table component and selects a record, the Data Table component preserves the selection even if the user searches again. The user must deselect the value to remove it from the list of selected values. If you pass the selected value to another component, the other component retains the value unless the user deselects it in the Data Table component. Previously, the Data Table component cleared the user's selection after each search.

### Maintain Your Previous Selections When You Search a Data Table

When a user searches in the Data Table component and selects a record, the Data Table component preserves the selection even if the user searches again. The user must deselect the value to remove it from the list of selected values. If you pass the selected value to another component, the other component retains the value unless the user deselects it in the Data Table component. Previously, the Data Table component cleared the user's selection after each search.

**Where:** This change applies to Lightning Experience and Salesforce Classic in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions. It's supported only in Lightning runtime for flows.

## Flow and Process Management

Get an overview of flow version and flow occurrence performance for segment-triggered flows. Migrate more processes to flows. Delete workflow rules from managed packages. Identify which flows contain email alerts.

### [View Performance Details for Segment-Triggered Flows](#)

View error statistics and information in a segment-triggered flow's flow version and flow occurrence page. From there, you can scan through errors and identify problem areas.

### Migrate Even More Processes with the Updated Migrate to Flow Tool

The Migrate to Flow tool now supports partial migration for most actions. At a minimum, you can partially migrate all actions except for invocable actions. The migration results identify which actions need further configuration in Flow Builder for your migration to be complete.

### Delete Workflow Rules from Managed Packages

With this new capability, migrating to flow is even easier for independent software vendor (ISV) partners. After migrating to flow, ISVs can delete workflow rules from first-generation (1GP) and second-generation (2GP) managed packages.

### Identify Flows Containing Email Alerts

With this update, you can see which flows use an email alert. A new category in Email Alerts Setup displays this information.

### Have Unlimited Paused and Waiting Flows

We removed the per-org usage-based limit for paused and waiting flow interviews. The amount of Salesforce storage available to your org can still limit the number of paused and waiting flow interviews stored. If you need more data storage, contact Salesforce.

## View Performance Details for Segment-Triggered Flows

View error statistics and information in a segment-triggered flow's flow version and flow occurrence page. From there, you can scan through errors and identify problem areas.

**Where:** This feature is available in Lightning Experience for Salesforce Enterprise and Unlimited editions with Marketing Cloud Growth edition.

**How:** On the Flows list view, select a flow. Next, select a specific flow version or flow occurrence. From the flow version or flow occurrence page, select the Performance tab. The Performance tab shows any errors the flow version or occurrence encountered, the last time each error happened, and how many times each error occurred.

## Migrate Even More Processes with the Updated Migrate to Flow Tool

The Migrate to Flow tool now supports partial migration for most actions. At a minimum, you can partially migrate all actions except for invocable actions. The migration results identify which actions need further configuration in Flow Builder for your migration to be complete.

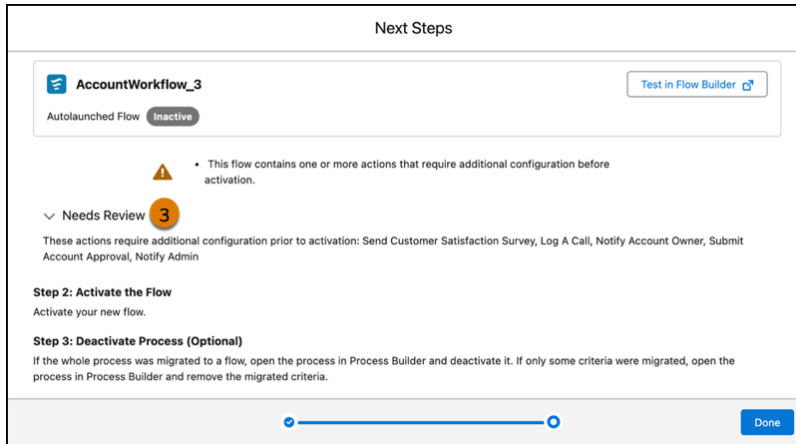
**Where:** This change applies to Lightning Experience and Salesforce Classic in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

**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, and click **Migrate to Flow**. Select the criteria that you want to migrate (1). The Migrateable column indicates if the process is partially migrateable (2). Then click **Migrate to Flow**. When the migration is complete, click **Needs Review** to see the list of actions that require additional configuration (3).

Name	Migratable	Scheduled Action	Evaluate Next	Resulting Flow	Recommendations
<input checked="" type="checkbox"/> IsWebAccount 1	Partially 2		No		
<input type="checkbox"/> Always Execute	Yes	✓	No		

⚠ The selected criteria contain actions that require additional configuration after migration.

○



## Delete Workflow Rules from Managed Packages

With this new capability, migrating to flow is even easier for independent software vendor (ISV) partners. After migrating to flow, ISVs can delete workflow rules from first-generation (1GP) and second-generation (2GP) managed packages.

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

SEE ALSO:

[Developer Documentation: Second-Generation Managed Packages \(can be outdated or unavailable during release preview\)](#)

## Identify Flows Containing Email Alerts

With this update, you can see which flows use an email alert. A new category in Email Alerts Setup displays this information.

**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 *Email Alerts*, and then select **Email Alerts**. Click the link for a specific email alert. If used in a flow, the Flows Using This Email Alert section is populated, including version, description, and object. You can also see if the flow is active.



**SETUP**  
**Email Alerts**

Email Alert  
**Inquiry (Managed)** Help for this Page

This Email Alert is managed, meaning that you may only edit certain attributes. [Display More Information](#)

[Rules Using This Email Alert](#) | [Approval Processes Using This Email Alert](#) | [Entitlement Processes Using This Email Alert](#)

**Email Alert Detail** Edit Clone

Description	Inquiry	Protected Component	<input type="checkbox"/>
Unique Name	Inquiry	Email Template	<a href="#">Marketing Product Inquiry Response</a>
Namespace Prefix	wfr_ns	Object	Case
Installed Package	<a href="#">WFRulesPackage</a>		
From Email Address	Current User's email address		
Recipients	<a href="#">User Admin User</a>		
Additional Emails			
Created By	<a href="#">Admin User</a> , 11/1/2023, 10:00 AM	Modified By	<a href="#">Admin User</a> , 11/1/2023, 10:00 AM

Edit Clone

**Rules Using This Email Alert** Rules Using This Email Alert Help

This alert is currently not used by any rules

**Approval Processes Using This Email Alert** Approval Processes Using This Email Alert Help

This alert is currently not used by any approval processes

**Entitlement Processes Using This Email Alert**

This alert is currently not used by any entitlement processes

**Flows Using This Email Alert**

Flow Name	Version	Description	Object	Active
<a href="#">Email New Account</a>	1		Account	<input type="checkbox"/>

[Back To Top](#) Always show me [more records per related list](#)

## Have Unlimited Paused and Waiting Flows

We removed the per-org usage-based limit for paused and waiting flow interviews. The amount of Salesforce storage available to your org can still limit the number of paused and waiting flow interviews stored. If you need more data storage, contact Salesforce.

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

SEE ALSO:

[Salesforce Help: Data and File Storage Allocations \(can be outdated or unavailable during release preview\)](#)

## Flow Extensions

Manage your MuleSoft Anypoint Platform Connection (beta). Enter custom user input validations for screen extension components. Map unsupported media types to supported media types in MuleSoft Services.

[Salesforce Relaunches Four Previously Enforced Release Updates](#)

Salesforce enforced four release updates in previous releases. In some orgs, the associated preferences were unintentionally reverted, requiring Salesforce to re-launch the updates again for the affected users. Impacted users receive a [Product and Services Notification](#) and can view the release updates in **Setup | Release Updates**.

[Manage Your MuleSoft Anypoint Platform Connection \(Beta\) in MuleSoft Services](#)

Configure a secure connection with MuleSoft directly from the MuleSoft Services Setup page. Establishing this connection enables MuleSoft to publish MuleSoft assets to Salesforce, creating the entities necessary to invoke those assets.

### [Use Custom Input Validations with Screen Extension Components](#)

Enter custom user input validations for your screen extension components in a Flow Screen. Previously, only some screen components in Screen Element supported custom input validations. Now, all do. Customize the error message that appears if the user enters an invalid value and define the values allowed for the components using a formula.

### [Use Media Type Mapping Options for Importing APIs with MuleSoft Services](#)

You can now map unsupported media types to supported media types when importing a MuleSoft Service.

## Salesforce Relaunches Four Previously Enforced Release Updates

Salesforce enforced four release updates in previous releases. In some orgs, the associated preferences were unintentionally reverted, requiring Salesforce to re-launch the updates again for the affected users. Impacted users receive a [Product and Services Notification](#) and can view the release updates in **Setup | Release Updates**.

The following release updates are scheduled to be enforced in the Winter '25 release:


- [Run Flows in user Context via REST API \(Release Update\)](#) on page 664
- [Make Flows Respect Access Modifiers for Legacy Apex Actions \(Release Update\)](#) on page 665
- [Disable Access to Sessions IDs in Flows \(Release Update\)](#) on page 665
- [Enable Parital Save for Invocable Actions \(Release Update\)](#) on page 666

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

## Manage Your MuleSoft Anypoint Platform Connection (Beta) in MuleSoft Services

Configure a secure connection with MuleSoft directly from the MuleSoft Services Setup page. Establishing this connection enables MuleSoft to publish MuleSoft assets to Salesforce, creating the entities necessary to invoke those assets.

**Where:** This feature is only available to customers of the Automation Starter and Automation Advanced SKUs. 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:** From Setup, in the Quick Find box, enter *MuleSoft*, and then select **MuleSoft > Services**. Click **Manage** to open a new dialog. Click **Connect** in the dialog to establish the connection.

## Use Custom Input Validations with Screen Extension Components

Enter custom user input validations for your screen extension components in a Flow Screen. Previously, only some screen components in Screen Element supported custom input validations. Now, all do. Customize the error message that appears if the user enters an invalid value and define the values allowed for the components using a formula.

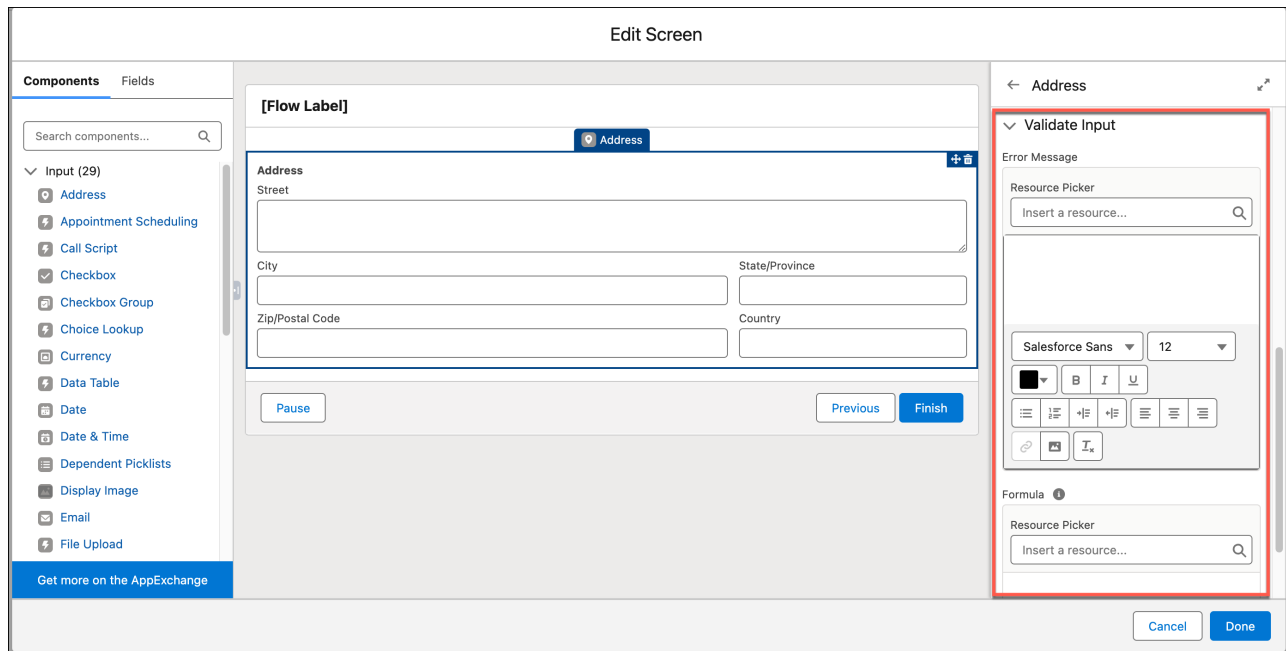
**Where:** This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions.

**How:** In Flow Builder, on a screen, add a screen input component, and then expand the **Validate Input** section. Enter your text for the customized error message, and then enter a formula.

Screen extension components that now support custom input validations include:

- Appointment Scheduling
- Address
- Data Table
- Dependent Picklists
- Email

- Display Image
- Lookup
- Name
- Phone
- Slider
- Toggle
- URL
- Slack Channel Selector
- Slack Workspace Selector
- File Upload
- Call Script
- Enhanced Message



SEE ALSO:

[Salesforce Help: Validate User Input on Flow Screens](#)

## Use Media Type Mapping Options for Importing APIs with MuleSoft Services

You can now map unsupported media types to supported media types when importing a MuleSoft Service.

**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**. Select a MuleSoft service, set service details, and click **Save & Next**. If you're selecting a MuleSoft service that produces or consumes media types that aren't supported, proceed to Map Unsupported Media Types to Supported Media Types.

SEE ALSO:

[Salesforce Help: Media Type Mapping in External Service Registrations](#)

## Flow and Process Release Updates

Salesforce Flow has several release updates that are scheduled to be enforced in future releases.

### [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. This update was first made available in Summer '23 and was scheduled to be enforced in Spring '24, but we postponed the enforcement date to Summer '24.

### [Enforce Sharing Rules when Apex Launches a Flow \(Release Update\)](#)

When this update is enabled, an autolaunched flow that runs in the default context enforces sharing rules when an Apex class launches the flow. To enforce sharing, the Apex class must be declared using the `with sharing` keyword.

### [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 available in Winter '23 and enforcement was scheduled for Summer '23. We then postponed the enforcement date to Spring '24 and postponed again to Winter '25.

### [Restrict User Access to Run Flows \(Release Update\)](#)

With this update enabled, Salesforce restricts a user's ability to run a flow. A user must be granted the correct profile or permission set to run the flow. When enabled, this release update deprecates the FlowSites org permission. With this update, flows run more securely because only users who are granted correct profiles or permission sets can run flows.

### [Enable Secure Redirection for Flows \(Release Update\)](#)

To protect your users and network, apply stricter validation to the flow URL parameter that determines where you redirect users after they complete a screen flow. With stricter validation, Salesforce blocks requests to redirect users to URLs that don't meet the additional validation requirements unless they're on your list of trusted URLs in Setup. When Salesforce blocks a request, users see an invalid-page redirection error. This update is available starting in Spring '25.

### [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 '25.

### [Run Flows in User Context via REST API \(Release Update\)](#)

Salesforce previously enforced this release update in Spring '22. In some cases, the associated preferences were inadvertently reverted by user actions, requiring Salesforce to re-launch the update for a subset of users. For impacted users, this update is available in your org and is scheduled to re-enforce it in Winter '25. With this update, a flow that runs via REST API uses the running user's profile and permission sets to determine the object permissions and field-level access of the flow.

#### [Evaluate Criteria Based on Original Record Values in Process Builder \(Release Update\)](#)

This update fixes a bug with the evaluation criteria in processes that have multiple criteria and a record update. This release update ensures that a process with multiple criteria and a record update evaluates the original value of the field that began the process with a value of null. This update was first made available in Summer '19.

#### [Make Flows Respect Access Modifiers for Legacy Apex Actions \(Release Update\)](#)

Salesforce previously enforced this release update in Spring '21. In some cases, the associated preferences were inadvertently reverted by user actions, requiring Salesforce to re-launch the update for a subset of users. For impacted users, this update is available in your org and is scheduled to re-enforce it in Winter '25. With this release update enabled, developers can trust that their legacy Apex actions are properly protected and available only to other components in their managed packages. This update makes a flow fail if it contains a public legacy Apex action.

#### [Disable Access to Session IDs in Flows \(Release Update\)](#)

Salesforce previously enforced this release update in Winter '24. In some cases, the associated preferences were inadvertently reverted by user actions, requiring Salesforce to re-launch the update for a subset of users. For impacted users, this update is available in your org and is scheduled to re-enforce it in Winter '25. 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..

#### [Enable Partial Save for Invocable Actions \(Release Update\)](#)

Salesforce previously enforced this release update in Spring '20. In some cases, the associated preferences were inadvertently reverted by user actions, requiring Salesforce to re-launch the update for a subset of users. For impacted users, this update is available in your org and is scheduled to re-enforce it in Winter '25. This critical update improves the behaviors and effects of failed invocable actions. It only affects external REST API calls to invocable actions done in bulk. With this update, when invoking a set of actions in a single request, a single failed invocable action no longer causes the entire transaction to fail. Without this update, if a single invocable action fails, other invocable actions within the transaction are rolled back and the entire transaction fails.

### **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. This update was first made available in Summer '23 and was scheduled to be enforced in Spring '24, but we postponed the enforcement date to Summer '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 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:** When this update is enforced, any call to the EmailSimple invocable action adheres to organization-wide email address profile settings. Using the EmailSimple action in Flow, Apex, or REST API without the correct email address profile setting results in an error.

**How:** If you have granted users access to invoke EmailSimple through internal features or via the REST API, review their implementation and the profile settings applied to their organization-wide email addresses. 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 assessment steps.

SEE ALSO:

[Release Updates](#)

## Enforce Sharing Rules when Apex Launches a Flow (Release Update)

When this update is enabled, an autolaunched flow that runs in the default context enforces sharing rules when an Apex class launches the flow. To enforce sharing, the Apex class must be declared using the `with sharing` keyword.

**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 '25. 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 Apex class that's declared using the `with sharing` keyword launches an autolaunched flow that runs in the default context, the flow runs in system context with sharing rules. Previously, the flow ran in system context without sharing when an Apex class launched the flow.

After this release update is enabled, the flow runs more securely in the default context when an Apex class that's declared using the `with sharing` keyword launches an autolaunched flow. The flow enforces the sharing rules of the user that executes the Apex class. Previously, when sharing rules weren't enforced, the flow was able to access all data.

**How:** When this update is enforced, data access is restricted for autolaunched flows that are run in the default context and launched by an Apex class. The Apex class must be declared using the `with sharing` keyword. Data access is restricted to the sharing rules of the user that executed the Apex class.

For example, a query can return fewer rows than it did in system context without sharing. An operation can fail because the user doesn't have the correct permissions.

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 available in Winter '23 and enforcement was scheduled for Summer '23. We then postponed the enforcement date to Spring '24 and postponed again to Winter '25.

**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 '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 Prevent Guest User from Editing or Deleting Approval Requests, follow the testing and activation steps.

SEE ALSO:

[Release Updates](#)

## Restrict User Access to Run Flows (Release Update)

With this update enabled, Salesforce restricts a user's ability to run a flow. A user must be granted the correct profile or permission set to run the flow. When enabled, this release update deprecates the FlowSites org permission. With this update, flows run more securely because only users who are granted correct profiles or permission sets can run flows.

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

**When:** Salesforce enforces this update in Winter '25. 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, in some cases, all users could run all flows without profiles or permission sets. Enabling this update restricts user access to users who are granted the profile or permission set to run the flow.

**How:** To apply this update, from Setup, in the Quick Find box, enter *Release Updates*, and then select **Release Updates**. For Restrict User Access to Run Flows, follow the testing and activation steps.

After you enable Restrict User Access to Run Flows, all users must be granted access to run a flow. Add the Run Flows permission to a permission set. For more granular access control, restrict specific flow access to an available profile. To create, update, and delete a flow, add the Manage Flow permission.

SEE ALSO:

[Release Updates](#)

[Salesforce Help: User Permissions](#)

[Salesforce Help: Limit User Access to Execute Flows](#)

## Enable Secure Redirection for Flows (Release Update)

To protect your users and network, apply stricter validation to the flow URL parameter that determines where you redirect users after they complete a screen flow. With stricter validation, Salesforce blocks requests to redirect users to URLs that don't meet the additional validation requirements unless they're on your list of trusted URLs in Setup. When Salesforce blocks a request, users see an invalid-page redirection error. This update is available starting in Spring '25.

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

**When:** Salesforce enforces this update starting in Spring '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 review this update, from Setup, in the Quick Find box, enter *Release Updates*, and then select **Release Updates**. For the Enable Secure Redirection for Flows release update, review the documentation links that describe valid redirection URLs, and then follow the testing and activation steps.

SEE ALSO:

[Salesforce Help: Customize a Flow URL to Control Finish Behavior](#)

[Salesforce Help: Manage Redirections to External URLs](#)

[Release Updates](#)

## 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 '25.

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

**When:** Salesforce enforces this update in Spring '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:** 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](#)

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

Salesforce previously enforced this release update in Spring '22. In some cases, the associated preferences were inadvertently reverted by user actions, requiring Salesforce to re-launch the update for a subset of users. For impacted users, this update is available in your org and is scheduled to re-enforce it in Winter '25. With this update, a flow that runs via REST API uses the running user's profile and permission sets to determine the object permissions and field-level access of the flow.

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

**When:** Salesforce is scheduled to re-enforce this update in Winter '25. To get the major release upgrade date for your instance, go to [Trust Status](#), search for your instance, and click the maintenance tab.

**Why:** Previously, a flow ran in system context when the flow was executed via REST API. A flow that runs in system context has permission to access and modify all data.

With this update, the flow runs in the context of the user who is authenticated via REST API. When the flow runs via REST API, the running user's profile and permission sets determine the object permissions and field-level access of the flow.

For example, the Update Account Type flow is run via REST API.

```
POST /v54.0/actions/custom/flow/Update_Account_Type
```

This update improves security in Salesforce by preventing you from unintentionally allowing users to create or edit records they don't have access to.

**How:** Enabling this update prevents flows that run via REST API from editing records that the running user doesn't have permission to edit.

To review this update, from Setup, in the Quick Find box, enter *Release Updates*, and then select **Release Updates**. For Run Flows in User Context via REST API, follow the testing and activation steps.

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

This update fixes a bug with the evaluation criteria in processes that have multiple criteria and a record update. This release update ensures that a process with multiple criteria and a record update evaluates the original value of the field that began the process with a value of null. This update was first made available in Summer '19.

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

**When:** Salesforce enforces this update in Summer '25. To get the major release upgrade date for your instance, go to [Trust Status](#), search for your instance, and click the maintenance tab.

**How:** To apply this update, from Setup, in the Quick Find box, enter *Release Updates*, and then select **Release Updates**. For Evaluate Criteria Based on Original Record Values in Process Builder, follow the testing and activation steps.



If you have a process with the *Do you want to execute the actions only when specified changes are made to the record?* option selected, or it uses the `ISCHANGED()` function in your criteria, this update can cause the process to behave differently.

SEE ALSO:

[Release Updates](#)

## Make Flows Respect Access Modifiers for Legacy Apex Actions (Release Update)


Salesforce previously enforced this release update in Spring '21. In some cases, the associated preferences were inadvertently reverted by user actions, requiring Salesforce to re-launch the update for a subset of users. For impacted users, this update is available in your org and is scheduled to re-enforce it in Winter '25. With this release update enabled, developers can trust that their legacy Apex actions are properly protected and available only to other components in their managed packages. This update makes a flow fail if it contains a public legacy Apex action.

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

**When:** Salesforce is scheduled to re-enforce this update in Winter '25. 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 resolves an issue where flows don't respect the public access modifiers for legacy Apex actions. The issue affects only legacy Apex actions that reference Apex classes installed from managed packages.

Legacy Apex actions were formerly known as Apex plug-ins. When you define an Apex class that implements the `Process.Plugin` interface in your org, it's available in Flow Builder as a legacy Apex action.

 **Note:** For new Apex integrations, we recommend using the `InvocableMethod` annotation instead of the `Process.Plugin` interface. This update doesn't affect invocable Apex methods.

With this update enabled:

- Flows fail when they execute public legacy Apex actions.
- Public legacy Apex actions aren't available in Flow Builder.
- Global legacy Apex actions with public `describe` or `invokeMethods` are available to flows in a different namespace.

**How:** We recommend that you test this update in a sandbox or developer org before activating the update in production. If you must work in your production org, do so during off-peak hours. Test all paths that contain legacy Apex action elements and make sure your flows work correctly. If a legacy Apex action is important for a business process but isn't supported with this update, contact the package developer. The developer can consider making a legacy Apex action global, or rebuilding the functionality in a new Apex class.

To apply this update, from Setup, in the Quick Find box, enter *Release Updates*, and select **Release Updates**. For Make Flows Respect Access Modifiers for Legacy Apex Actions, follow the testing and activation steps.

## Disable Access to Session IDs in Flows (Release Update)

Salesforce previously enforced this release update in Winter '24. In some cases, the associated preferences were inadvertently reverted by user actions, requiring Salesforce to re-launch the update for a subset of users. For impacted users, this update is available in your org and is scheduled to re-enforce it in Winter '25. 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..

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

**When:** Salesforce is scheduled to re-enforce this update in Winter '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:** 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.

## Enable Partial Save for Invocable Actions (Release Update)

Salesforce previously enforced this release update in Spring '20. In some cases, the associated preferences were inadvertently reverted by user actions, requiring Salesforce to re-launch the update for a subset of users. For impacted users, this update is available in your org and is scheduled to re-enforce it in Winter '25. This critical update improves the behaviors and effects of failed invocable actions. It only affects external REST API calls to invocable actions done in bulk. With this update, when invoking a set of actions in a single request, a single failed invocable action no longer causes the entire transaction to fail. Without this update, if a single invocable action fails, other invocable actions within the transaction are rolled back and the entire transaction fails.

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

**When:** Salesforce is scheduled to re-enforce this update in Winter '25. To get the major release upgrade date for your instance, go to [Trust Status](#), search for your instance, and click the maintenance tab.

**Why:** Without this critical update, if one invocable action fails, other invocable actions in the same transaction are rolled back. With this critical update, Salesforce tries three times to execute the invocable actions that run successfully and rolls back only the invocable actions that fail to execute. This functionality is called "partial save."

Most invocable action types that are invoked via REST API are enabled with the partial save functionality. However, even with this critical update, the following action types don't support partial save functionality:

- Cancel Fulfillment Order
- Cancellation Orders
- Capture Funds
- Content Workspaces
- Create Fulfillment Order
- Create Invoice from Fulfillment Order
- Create Service Report
- External Services
- Generate Work Orders
- Invocable Apex
- Skills-based Routing
- Submit Digital Form Response

Partial save can cause an external callout to occur multiple times, and external callouts can't be rolled back. Repeated external callouts can occur only when a flow is launched from a process or invoked from REST API, and that flow makes multiple attempts to execute the action that's making the external callouts.

Because partial save can make multiple attempts to execute an action, the transaction can take longer than expected. This can cause your org to reach some limits sooner than expected.

### How:

From Setup, enter *Critical Updates* in the Quick Find box, and select **Critical Updates**. For Enable Partial Save for Invocable Actions, click **Activate**.

Review any API integrations that use invocable actions to ensure they properly accommodate partial-save behavior.

## Flow Orchestration

Control who to run a background or MuleSoft step as. Use Flow Orchestration custom reports. Disable default email notifications to people who have been assigned work items and send custom notifications.

### [Control the User Context of a Background or MuleSoft Step](#)

Starting in API version 60.0, the default running user for background steps and MuleSoft steps is the Automated Process User. When the Automated Process User doesn't have required access to features, records, or external credentials, specify who you want to run the step as. Run the step as a selected user or opt to run the step as a user specified by a resource at run time. When an orchestration is activated, every step that's configured to run as a selected user generates an entry in the audit trail.

### [Use Reports for Flow Orchestration Objects to Track Orchestration Usage](#)

New custom report types include Orchestration Runs Spring '24, Orchestration Stage Runs Spring '24, Orchestration Step Runs Spring '24, Orchestration Work Items Spring '24, and Orchestration Run Logs Spring '24. Each custom report type also has an associated sample report. For example, use Sample Report: Orchestration Runs to determine what orchestration runs have been created and the status of each run. These reports aren't added to your org when it already contains the maximum number of defined custom report types.

### [Disable Default Email Notifications for Orchestration Work Items](#)

Too many orchestration work item notifications getting emailed to users, groups, and queues? Use the new Stop Sending Orchestration Work Item Default Email Notifications process automation setting to stop sending default email notifications when work items are assigned or reassigned.

### [Fine-Tune Access to Flow Orchestration Functions](#)

Use new permissions instead of Manage Orchestration Runs and Work Items to better control user access to Flow Orchestration functions. With the Reassign Orchestration Work Items user permission, users can reassign orchestration work items. With the Manage Orchestration Runs user permission, users can cancel or debug orchestrations.

### [Other Changes to Flow Orchestration](#)

Learn about improvements to Flow Orchestration.

## Control the User Context of a Background or MuleSoft Step

Starting in API version 60.0, the default running user for background steps and MuleSoft steps is the Automated Process User. When the Automated Process User doesn't have required access to features, records, or external credentials, specify who you want to run the step as. Run the step as a selected user or opt to run the step as a user specified by a resource at run time. When an orchestration is activated, every step that's configured to run as a selected user generates an entry in the audit trail.

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

**Why:** Actions called by MuleSoft steps are associated with external credentials. If the Automated Process User doesn't have access to the underlying action's external credentials, the step fails. Similarly, if the Automated Process User doesn't have access to a feature or record that's a part of a background step, the background step fails.

**How:** When you configure your background or MuleSoft step, use the new Select Who to Run the Action As Section to select a specified user or a user specified by a resource at run time.

The screenshot shows the 'New Background Step' configuration interface. It includes the following sections:

- Label and API Name:** Both fields are set to 'Verify Identity'.
- Description:** 'Verifies the identity of the applicant.'
- Select When to Start the Step:** Condition is 'When the stage starts, the step starts'.
- Select an Action to Run:** Action is 'Verify Customer Identity'. There is a button 'Open Flow in Flow Builder' and a checkbox 'Contains external callouts or wait elements'.
- Set Input Values for the Selected Action:** A toggle for 'customerName' is currently turned off.
- Select Who to Run the Action As:** This section is highlighted with a yellow border. It shows 'User Type' as 'A User Specified by a Resource at Run Time' and 'User Resource' as 'contextUsername'.

## Use Reports for Flow Orchestration Objects to Track Orchestration Usage

New custom report types include Orchestration Runs Spring '24, Orchestration Stage Runs Spring '24, Orchestration Step Runs Spring '24, Orchestration Work Items Spring '24, and Orchestration Run Logs Spring '24. Each custom report type also has an associated sample report. For example, use Sample Report: Orchestration Runs to determine what orchestration runs have been created and the status of each run. These reports aren't added to your org when it already contains the maximum number of defined custom report types.

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

SEE ALSO:

[Salesforce Help: What are some common report limits? \(can be outdated or unavailable during release preview\)](#)

## Disable Default Email Notifications for Orchestration Work Items

Too many orchestration work item notifications getting emailed to users, groups, and queues? Use the new Stop Sending Orchestration Work Item Default Email Notifications process automation setting to stop sending default email notifications when work items are assigned or reassigned.

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

## Fine-Tune Access to Flow Orchestration Functions

Use new permissions instead of Manage Orchestration Runs and Work Items to better control user access to Flow Orchestration functions. With the Reassign Orchestration Work Items user permission, users can reassign orchestration work items. With the Manage Orchestration Runs user permission, users can cancel or debug orchestrations.

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

## Other Changes to Flow Orchestration

Learn about improvements to Flow Orchestration.

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

## Variable Values Visible in Debugger Details

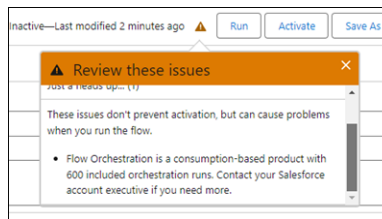
You can see variable values in the debugger details for orchestrations.

## Paused Flow Interview Limit Removed

We removed the per-org usage-based limit for paused and waiting flow interviews. With this change you have more parallel in-progress and paused orchestration runs.

## New Save-Time Warning Message

When you save an orchestration, a reminder that Flow Orchestration is a consumption-based product is displayed. The new message doesn't affect your ability to save and activate orchestrations.



SEE ALSO:

[Have Unlimited Paused and Waiting Flows](#)

## Salesforce for Slack Integrations

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

See the release notes for the latest updates: [Salesforce for Slack Integrations Release Notes](#).

## Security, Identity, and Privacy

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View anomalous guest user activity right from the Threat Detection app in Security Center. Update your trusted URLs for an upcoming change. Reduce your reliance on redirections for your legacy Salesforce domains. Access External Key Management in all commercial zones. Use the OAuth 2.0 token exchange flow, enable the OAuth 2.0 refresh token rotation, or set up any of a handful of external client app OAuth 2.0 flows.

### Domains

Reduce your reliance on redirections for your legacy Salesforce domains. Partitioned domains are available in demo orgs and in Developer Edition orgs on Salesforce Edge Network.

### [Identity and Access Management](#)

Identity is improving with expanded support for OAuth 2.0 and much more. Use the OAuth 2.0 token exchange flow to swap tokens from a third-party identity provider for Salesforce tokens. Use multiple, branded email templates for the Headless Registration Flow, Headless Passwordless Login Flow, and Headless Forgot Password Flow with an allowlist for one-time password email templates. Track changes to the login options displayed to end users on your My Domain and Experience Cloud login pages. To prevent security threats during the OAuth 2.0 refresh token flow, enable refresh token rotation. Use external client apps with JWT bearer flow, OAuth 2.0 client credentials flow, or OAuth 2.0 device flow.

### [Named Credentials](#)

Configure external credentials using the Basic authentication protocol. Manage and share named credential configurations between development, test, and production environments with managed 2GP and unlocked packages. Explore expanded support for formula functions in custom headers and improvements to sandbox cloning and org migrations for named credentials.

### [Privacy Center](#)

Save time and copy your Privacy Center policy configurations to and from your sandbox and production orgs. Automatically run any Right to Be Forgotten policies in your queue every 24 hours. Get more information on why a job failed with the new Related tab on policy jobs. Read and write consent information between your preference forms and Data Cloud in Preference Manager (beta). Add a universal unsubscribe option to your preference forms.

### [Salesforce Backup](#)

Back up data as you go with delta backups. And expand your backup policies to capture file and attachment data. You can export file and attachment backups for review and import them as needed.

### [Salesforce Shield](#)

Detect malicious guest user activity with the Guest User Anomaly Event. Shield Platform Encryption Setup pages have improved labeling and design for easier navigation. Access External Key Management in all commercial zones.

### [Security Center](#)

View anomalous guest user activity right from the Threat Detection app in Security Center. Enjoy an enhanced user experience curated to your needs. Ensure comprehensive insight into all your rollout activities with additional system permissions.

### [Other Security Changes](#)

Update your trusted URLs for an upcoming change to the system-defined content security policy (CSP), and block untrusted cross-org redirections. Update your connected apps with newly required information for Google Firebase projects.

## Domains

Reduce your reliance on redirections for your legacy Salesforce domains. Partitioned domains are available in demo orgs and in Developer Edition orgs on Salesforce Edge Network.

### [Update References to Your Previous Salesforce Domains](#)

Prevent disruption for your customers and end users when the temporary redirection of legacy Salesforce domains ends in 2024. To help your users update outdated links and bookmarks, display a brief message during the redirections that provides the updated URL. Then update references to your previous Salesforce URLs, including site URLs and URLs that contain your Salesforce instance but not your My Domain name.

### [Use Partitioned Domains in More Orgs](#)

To maximize the availability of your orgs, My Domain uses partitioned domains for new Developer Edition orgs, patch orgs, scratch orgs, demo orgs, and Trailhead Playgrounds. Partitioned domains include a word related to the org type, which allows Salesforce to gradually roll out service delivery changes. To ensure continued access to all your orgs, update your allowlists for the new domains. To include your existing org in the Salesforce deployment schedule for that org type, enable and deploy partitioned domains.

## Update References to Your Previous Salesforce Domains

Prevent disruption for your customers and end users when the temporary redirection of legacy Salesforce domains ends in 2024. To help your users update outdated links and bookmarks, display a brief message during the redirections that provides the updated URL. Then update references to your previous Salesforce URLs, including site URLs and URLs that contain your Salesforce instance but not your My Domain name.

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

**When:** Salesforce stops the redirections for these hostnames in Winter '25. The deployment of that release is scheduled to start in August 2024 for sandboxes and in September 2024 for production.

SEE ALSO:

[Salesforce Help: Prepare for the End of Redirections for Non-Enhanced Domains \(can be outdated or unavailable during release preview\)](#)

## Use Partitioned Domains in More Orgs

To maximize the availability of your orgs, My Domain uses partitioned domains for new Developer Edition orgs, patch orgs, scratch orgs, demo orgs, and Trailhead Playgrounds. Partitioned domains include a word related to the org type, which allows Salesforce to gradually roll out service delivery changes. To ensure continued access to all your orgs, update your allowlists for the new domains. To include your existing org in the Salesforce deployment schedule for that org type, enable and deploy partitioned domains.

**Where:** This change applies to non-production orgs with enhanced domains in Lightning Experience, Salesforce Classic, and all versions of the Salesforce mobile app in Group, Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions. The demo partition is newly available, and the develop and scratch partitions are newly available if you use Salesforce Edge Network. Only the sandbox partition is available in Government Cloud—Defense orgs, and partitioned domains aren't available in Trailhead Playgrounds on Salesforce Edge Network.

**When:** Partitioned domains are enabled by default in new qualifying orgs. Sandboxes with enhanced domains are always partitioned.

**How:** To ensure that your users can connect to partitioned domains, update your allowlists.

In existing demo orgs, Developer Edition orgs, patch orgs, scratch orgs, and Trailhead Playgrounds with enhanced domains, you can enable or disable this feature from the My Domain Setup page. When you enable the Use partitioned domains option in the My Domain Details section, you can preview your new My Domain login URL at the bottom of the screen. To use partitioned domains, save the change and deploy your new My Domain.

**My Domain Details** Save Cancel

Current My Domain URL: **demo-mycompany.my.salesforce.com** with enhanced domains

Before changing your My Domain details, review My Domain Considerations in Salesforce Help.

If you change your My Domain name or suffix, you must deploy your new My Domain.

My Domain Name:  Check Availability Available

Domain Suffix:

**Domain Partitioning**  Use partitioned domains

Your chosen new My Domain URL: **mycompany.demo.my.salesforce.com** with partitioned enhanced domains

Save Cancel

SEE ALSO:

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

## Identity and Access Management

Identity is improving with expanded support for OAuth 2.0 and much more. Use the OAuth 2.0 token exchange flow to swap tokens from a third-party identity provider for Salesforce tokens. Use multiple, branded email templates for the Headless Registration Flow, Headless Passwordless Login Flow, and Headless Forgot Password Flow with an allowlist for one-time password email templates. Track changes to the login options displayed to end users on your My Domain and Experience Cloud login pages. To prevent security threats during the OAuth 2.0 refresh token flow, enable refresh token rotation. Use external client apps with JWT bearer flow, OAuth 2.0 client credentials flow, or OAuth 2.0 device flow.

### [Migrate to a Multiple-Configuration SAML Framework \(Release Update\)](#)

If you see this release update, your Salesforce instance is using our original single-configuration SAML framework, which supports single sign-on (SSO) with only one external identity provider. With this release update, we're removing support for the single-configuration SAML framework and supporting only the multiple-configuration SAML framework. To preserve your existing configuration, follow the steps to apply this update. If you don't, your SSO configuration stops working when this update is enforced. This update is available starting in Spring '24.

### [Improve Compatibility with Third-Party Services with the Token Exchange Flow](#)

To simplify your integration patterns, use the OAuth 2.0 token exchange flow to swap tokens from a third-party identity provider for Salesforce tokens. With this flow, it's easier to give users access to protected Salesforce resources in an enterprise system that includes an identity provider, multiple service providers, and microservices.

### [Expand Branding Options and Improve Security for Headless Identity Flows](#)

To use multiple, branded email templates for the headless registration, passwordless login, and forgot password flows, create an allowlist for one-time password (OTP) email templates that are used to verify a user's identity. When your app sends its initial request to the headless API for the flow you're using, Salesforce accepts only allowlisted email templates in the `emailtemplate` parameter. This change also improves the security of your flow because templates that aren't allowlisted are blocked. Even if you're only using one email template, we recommend configuring an allowlist.

### [Monitor Changes to Login Pages in the Setup Audit Trail](#)

It's now easier to track changes to the login options displayed to end users on your My Domain and Experience Cloud login pages. For both My Domain and Experience Cloud login pages, monitor when an admin displays or hides the options to log in via the standard username-password login form, an authentication provider, and an external SAML identity provider. For My Domain login pages only, monitor when an admin displays or hides the options to log in using certificate-based authentication.



### [Find Experience Cloud SAML Endpoints More Easily](#)

To improve usability, when you configure single sign-on (SSO) with an external identity provider, your SAML endpoints for Experience Cloud sites are now displayed on the SSO setting detail page with the heading For Experience Cloud. Previously, Experience Cloud SAML endpoints were collapsed by default, making them harder to find. They were also grouped under the heading For Communities, an outdated name for Experience Cloud sites.

### [Salesforce-Managed App for the Twitter Authentication Provider is Being Retired](#)

The Salesforce-managed app for the Twitter authentication provider is being retired in Spring '24. To keep using this authentication provider for single sign-on (SSO), create your own app on the X (formerly known as Twitter) developer platform and update your authentication provider with the values from your app. Otherwise, your authentication provider stops working.

### [Generate Parameters for the Proof Key for Code Exchange \(PKCE\) Extension](#)

To more easily implement the OAuth 2.0 Proof Key for Code Exchange (PKCE) security extension, generate `code_challenge` and `code_verifier` parameters with a simple request to the new PKCE Generator endpoint. Include these parameters in your authorization flows to prevent authorization code injection attacks. We strongly recommend that you implement PKCE in all variations of the authorization code flow, including the web server flow, the hybrid web server flow, and all variations of the headless Authorization Code and Credentials Flow. It's especially important to implement PKCE for public clients that don't have a secure client backend, such as single-page apps and mobile apps.

### [Rotate Refresh Tokens](#)

To prevent security threats during the OAuth 2.0 refresh token flow, enable refresh token rotation on your connected app. Each time an app invokes the flow, get a new refresh token. To ensure that each token is used only one time, the old token is automatically invalidated. If someone tries to use a previous refresh token that's been rotated out, Salesforce invalidates the current refresh token, along with any associated access tokens. In that case, the client must complete a new flow to get another refresh token. This feature is supported for connected apps and external client apps.

### [Responses from the SCIM Users Endpoints Use 24-Hour Format for Created and Last Modified Dates](#)

To make the Salesforce System for Cross Domain Identity Management (SCIM) implementation consistent with REST API, we changed the format of the `created` and `lastModified` fields in responses from the `/services/scim/v2/Users` and `/services/scim/v2/Users/<user_Id>` endpoints. Previously, these fields were returned in Coordinated Universal Time (UTC) 12-hour format. Now, they're returned in UTC 24-hour format to match the format of the corresponding fields returned in REST API calls to the User object. To make sure your SCIM integrations don't break, update them to use the new format.

### [Get OAuth 2.0 Credentials for Consumers Associated with an External Client App](#)

Use the new Connect API endpoints to get credentials for OAuth consumers of an external client app. The Consumer Credentials by App endpoint returns credentials for all consumers associated with an external client app. The Credentials by Consumer endpoint returns the OAuth consumer key, consumer secret, or both for a specific consumer.

### [Configure an OAuth 2.0 Client Credentials Flow for an External Client App](#)

Exchange your external client app's OAuth 2.0 consumer key and secret for an access token with the client credentials flow. Use the new metadata fields to set up an OAuth 2.0 client credentials flow for your external client app.

### [Configure an OAuth 2.0 Device Flow for External Client Apps](#)

Use the new `isDeviceFlowEnabled` field to control enable OAuth 2.0 device flow for an external client app.

### [Configure an OAuth 2.0 JWT Bearer Flow for External Client Apps](#)

Use external client apps as part of your continuous integration system. Add a digital certificate to the new certificate field in the external client apps global OAuth settings file. With this certificate, you can create a JWT flow for an external client app.

### [Disable or Enable an External Client App Plugin](#)

Use the new `ExtlCIntAppConfigurablePolicies` metadata type to control the plugins for an external client app. You can disable the entire external client app and all of its plugins at once or disable just the OAuth plugin.

### [MFA Auto-Enablement Concludes for All Remaining Orgs \(Release Update\)](#)

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 has been automatically enabling MFA for production orgs via the MFA Auto-Enablement Release Update. The first phase of this process started in Spring '23. The fourth and final phase goes into effect when Spring '24 rolls out. The final phase includes all orgs that weren't previously auto-enabled.

### [UI Text Improvements for the MFA Registration Experience](#)

To improve the user experience when registering verification methods for multi-factor authentication (MFA), some text in the user interface has been updated.

### [Salesforce Authenticator Is Disabled for External Users in Newly Created Orgs](#)

For orgs created in Spring '24 or later, the Salesforce Authenticator mobile app is no longer available by default for external users. To enable it, contact Salesforce Customer Support. Because external users can only access your Experience Cloud sites, their accounts pose a lower security risk in the event that they're compromised. This change helps improve Salesforce Authenticator's service availability for internal users, who access the Salesforce UI directly. Orgs created before Spring '24 aren't affected by this change.

### [Revert Seamlessly to One-Time Passcodes for Identity Verification in Salesforce Authenticator](#)

If your users can't receive push notifications in the Salesforce Authenticator mobile app, they can verify their identity using the app's time-based one-time password (TOTP) feature. To minimize delays for users who log in with multi-factor authentication (MFA), we streamlined the user experience for TOTP verification even more. When Salesforce detects that push notifications are unavailable because of a service issue, users are automatically redirected to the TOTP verification screen. And when users click the Having Trouble? link, they're taken directly to the TOTP verification screen without additional steps.

### [Update the Salesforce Authenticator App to Version 4.1 in Summer '24](#)

Salesforce is increasing the minimum supported app version for Salesforce Authenticator in Summer '24. With this update, your users can receive push notifications for identity verification only in version 4.1 or higher. Users running an app version below 4.1 can continue verifying their identity with the app's time-based one-time password (TOTP) feature. The release of Salesforce Authenticator version 4.1 is targeted for March 2024. Direct your users to the Apple App Store (iOS) or Google Play (Android) to update their Salesforce Authenticator app.

### [Use Email Verifications to Back Up and Restore Connected Accounts in Salesforce Authenticator](#)

With Salesforce Authenticator version 4.0, the backup and restore feature has a new setup process. When users back up and restore their connected accounts, the app verifies their email address instead of their mobile number. To complete the verification, users enter a 6-digit code received in an email. This method is more secure than SMS-based verification. Users can still restore preexisting backups with their mobile number if they haven't yet verified their email address.

### [Stay on Top of Push Notifications for Salesforce Authenticator](#)

Having trouble getting push notifications from Salesforce Authenticator? Check whether notifications are enabled right from the Salesforce Authenticator app and turn them on with a one-tap link to your device settings. To ensure that you get notifications when you're in Focus mode, push notifications are now time-sensitive.

### [Terminate a User's UI Sessions Automatically When Resetting Their Password](#)

You can configure your org to automatically terminate all of a user's UI sessions when you reset that user's password. This setting helps to quickly mitigate security incidents such as stolen passwords or credential stuffing attacks. In case an attacker manages to access a user's account, the attacker's session ends as soon as you reset the password for the account. This setting also applies when you reset passwords for multiple users at once.

### [Login History Entries Are Reduced When Login Rate Limiting Is Active](#)

When a user exceeds 3,600 login requests per hour and triggers login rate limiting, Salesforce reduces the number of new Login History entries for that user. When the user's login request rate falls back below 3,600 per hour and rate limiting ends, Salesforce resumes the standard behavior of recording an entry for each individual login request. Login rate limiting is typically triggered only by API integration users.

### [Set Up Registration and Login for Pay Now](#)

To simplify Pay Now purchases, set up registration and login with one-click checkout.

### [Upgrade to Identity Connect 7.1.6](#)

To get the latest security enhancements, upgrade from your current version of Identity Connect to Identity Connect 7.1.6. Identity Connect 7.1.6 adds to the extensive security improvements introduced in Identity Connect 7.1.1. If you're using Identity Connect 2.1 or Identity Connect 3.0.X.X, we recommend that you upgrade to Identity Connect 7.1.6 as soon as possible. As of the Winter '22 release, you can no longer download Identity Connect 2.1 and Identity Connect 3.0.X.X.

### [Receive Additional Status Information During Headless Forgot Password Flow](#)

Salesforce now sends the client a `status` parameter in addition to the `status_code` parameter during the Headless Forgot Password flow success message.

### [See Password Resets in the Login History](#)

To make it easier to track users' password changes, the Login Subtype column in the Login History now displays `Change Password` when a user resets their password. Previously, the Login History logged password resets as GET requests, but there was no way to differentiate between password resets and other types of GET requests.

## Migrate to a Multiple-Configuration SAML Framework (Release Update)

If you see this release update, your Salesforce instance is using our original single-configuration SAML framework, which supports single sign-on (SSO) with only one external identity provider. With this release update, we're removing support for the single-configuration SAML framework and supporting only the multiple-configuration SAML framework. To preserve your existing configuration, follow the steps to apply this update. If you don't, your SSO configuration stops working when this update is enforced. This update is available starting in Spring '24.

**Where:** This change applies to Lightning Experience and Salesforce Classic in Enterprise, 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:** We're no longer supporting the single-configuration SAML SSO framework that you're currently using. When this update is enforced, you're required to use a multiple-configuration SAML framework. To keep using your existing SAML SSO configuration, migrate to the multiple-configuration framework. Otherwise, your SAML SSO stops working for you when this update is enforced.

With the multiple-configuration SAML framework, you can integrate your Salesforce org or Experience Cloud site with multiple external identity providers.

**How:** These changes apply to your existing SAML SSO configuration.

- SAML responses from your identity provider must include the `audience` attribute.
- Your Salesforce Login URL changes.
- If Salesforce can't parse a SAML response, it isn't recorded in the login history.

Make sure you understand these changes, update your configuration accordingly, and test all changes in a sandbox before enabling this update. If you don't, your configuration stops working when this update is enforced.

To review this update, from Setup, in the Quick Find box, enter *Release Updates*, and then select **Release Updates**. For Migrate to a Multiple-Configuration SAML Framework, follow the testing and activation steps.

SEE ALSO:

[Release Updates](#)

## Improve Compatibility with Third-Party Services with the Token Exchange Flow

To simplify your integration patterns, use the OAuth 2.0 token exchange flow to swap tokens from a third-party identity provider for Salesforce tokens. With this flow, it's easier to give users access to protected Salesforce resources in an enterprise system that includes an identity provider, multiple service providers, and microservices.

**Where:** This change applies to Enterprise, Performance, Unlimited, and Developer editions.

**How:** During the flow, your app posts a request to the Salesforce token endpoint. To validate the token from the identity provider and map its subject to a Salesforce user, use a token exchange handler, which you define via Metadata API and develop with Apex. At the end of the flow, your app receives a Salesforce access token along with any other requested tokens. Your app uses the tokens to grant access to protected Salesforce data.

SEE ALSO:

[Salesforce Help: OAuth 2.0 Token Exchange Flow \(can be outdated or unavailable during release preview\)](#)

[Auth Namespace](#)

[Metadata API](#)

## Expand Branding Options and Improve Security for Headless Identity Flows

To use multiple, branded email templates for the headless registration, passwordless login, and forgot password flows, create an allowlist for one-time password (OTP) email templates that are used to verify a user's identity. When your app sends its initial request to the headless API for the flow you're using, Salesforce accepts only allowlisted email templates in the `emailtemplate` parameter. This change also improves the security of your flow because templates that aren't allowlisted are blocked. Even if you're only using one email template, we recommend configuring an allowlist.

**Where:** This change is available in LWR, Aura, and Visualforce sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Unlimited, and Developer editions.

**How:** To create the allowlist for your Experience Cloud site, use Metadata API to create a `NetworkEmailTmplAllowlist` metadata type for each allowlisted template.

For headless registration and headless passwordless login, include an `emailtemplate` parameter containing a template from the allowlist in your initial request to Headless Registration API or Headless Passwordless Login API.

For the Headless Forgot Password Flow, there's an extra step. On the Login & Registration page in your Administration workspace, under Headless Forgot Password, select **Use only allowlisted email templates**. Then include the `emailtemplate` parameter with an allowlisted template in your initial request to Headless Forgot Password API.

SEE ALSO:

[Salesforce Help: Headless Identity APIs for Customers and Partners \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Use Multiple Email Templates for Headless Flows \(can be outdated or unavailable during release preview\)](#)

[Metadata API](#)

## Monitor Changes to Login Pages in the Setup Audit Trail

It's now easier to track changes to the login options displayed to end users on your My Domain and Experience Cloud login pages. For both My Domain and Experience Cloud login pages, monitor when an admin displays or hides the options to log in via the standard username-password login form, an authentication provider, and an external SAML identity provider. For My Domain login pages only, monitor when an admin displays or hides the options to log in using certificate-based authentication.

**Where:** Where these changes apply depends on where each login option is available.

- For My Domain, here's where each login option is available.
  - The username-password login form, certificate-based authentication, and SAML identity provider options are available in Lightning Experience and Salesforce Classic in Group, Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.
  - Authentication providers are available in Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.
- For Experience Cloud sites, the username-password login form, authentication providers, and SAML identity providers are available in LWR, Aura, and Visualforce sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

**How:** For the options to log in with a certificate, an authentication provider, or an external SAML identity provider, you must configure each login method before it appears as a login option.

For My Domain, control which login options are displayed from the My Domain page in Setup. For Experience Cloud sites, control the login page display from the Login & Registration page in the Administration workspace.

SEE ALSO:

[Salesforce Help: Add Identity Providers to the My Domain Login Page \(can be outdated or unavailable during release preview\)](#)

## Find Experience Cloud SAML Endpoints More Easily

To improve usability, when you configure single sign-on (SSO) with an external identity provider, your SAML endpoints for Experience Cloud sites are now displayed on the SSO setting detail page with the heading For Experience Cloud. Previously, Experience Cloud SAML endpoints were collapsed by default, making them harder to find. They were also grouped under the heading For Communities, an outdated name for Experience Cloud 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.

**How:** To view your Experience Cloud SAML endpoints after you create an SSO setting, from Setup in the Quick Find box, enter *Single Sign-On Settings*, and then select **Single Sign-On Settings**. Your Experience Cloud SAML endpoints are listed. Share these endpoints with your identity provider.

SEE ALSO:

[Salesforce Help: Configure SSO with Salesforce as a SAML Service Provider \(can be outdated or unavailable during release preview\)](#)

## Salesforce-Managed App for the Twitter Authentication Provider is Being Retired

The Salesforce-managed app for the Twitter authentication provider is being retired in Spring '24. To keep using this authentication provider for single sign-on (SSO), create your own app on the X (formerly known as Twitter) developer platform and update your authentication provider with the values from your app. Otherwise, your authentication provider stops working.

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

**How:** Previously, if you left the consumer key and consumer secret values blank when configuring your authentication provider, Salesforce supplied values using the Salesforce-managed app. With this change, you can no longer save a new or existing authentication provider without including a consumer key and consumer secret.

SEE ALSO:

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

[Metadata API](#)

## Generate Parameters for the Proof Key for Code Exchange (PKCE) Extension

To more easily implement the OAuth 2.0 Proof Key for Code Exchange (PKCE) security extension, generate `code_challenge` and `code_verifier` parameters with a simple request to the new PKCE Generator endpoint. Include these parameters in your authorization flows to prevent authorization code injection attacks. We strongly recommend that you implement PKCE in all variations of the authorization code flow, including the web server flow, the hybrid web server flow, and all variations of the headless Authorization Code and Credentials Flow. It's especially important to implement PKCE for public clients that don't have a secure client backend, such as single-page apps and mobile apps.

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

**How:** Send a GET request to the `services/oauth2/pkce/generator` endpoint on your My Domain or Experience Cloud site URL.

SEE ALSO:

[Salesforce Help: Proof Key for Code Exchange \(PKCE\) Extension \(can be outdated or unavailable during release preview\)](#)

## Rotate Refresh Tokens

To prevent security threats during the OAuth 2.0 refresh token flow, enable refresh token rotation on your connected app. Each time an app invokes the flow, get a new refresh token. To ensure that each token is used only one time, the old token is automatically invalidated. If someone tries to use a previous refresh token that's been rotated out, Salesforce invalidates the current refresh token, along with any associated access tokens. In that case, the client must complete a new flow to get another refresh token. This feature is supported for connected apps and external client apps.

**Where:** This change is available in Salesforce Classic and Lightning Experience in all editions.

SEE ALSO:

[Salesforce Help: OAuth 2.0 Refresh Token Flow for Renewed Sessions \(can be outdated or unavailable during release preview\)](#)

## Responses from the SCIM Users Endpoints Use 24-Hour Format for Created and Last Modified Dates

To make the Salesforce System for Cross Domain Identity Management (SCIM) implementation consistent with REST API, we changed the format of the `created` and `lastModified` fields in responses from the `/services/scim/v2/Users` and `/services/scim/v2/Users/<user_Id>` endpoints. Previously, these fields were returned in Coordinated Universal Time (UTC) 12-hour format. Now, they're returned in UTC 24-hour format to match the format of the corresponding fields returned in REST API calls to the User object. To make sure your SCIM integrations don't break, update them to use the new format.

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

**How:** For example, send a GET request to the `/services/scim/v2/Users` endpoint on your My Domain URL. Here's an example SCIM call that queries a specific user.

```
GET https://mycompany.my.salesforce.com/services/scim/v2/Users/<userId>
```

The call returns a full JSON response with information about the user. Here's an excerpt from the response's `meta { }` object. Before this change, these same times displayed in the `created` field as `2023-10-30T02:30:15Z` and in the `lastModified` field as `2023-10-30T03:20:10Z`.

```
"meta": {  
  "created": "2023-10-30T14:30:15Z",
```

```
"lastModified": "2023-11-01T15:20:10Z",  
"location": "https://mycompany.my.salesforce.com/services/scim/v2Users/<userId>",  
"resourceType": "User",  
"version": "d959e2db34c46435d2c1321126dc54ef25f2ca39"  
}
```

A similar GET request to

`https://mycompany.my.salesforce.com/services/data/v60.0/subjects/User/<userId>` returns a User object with the `CreatedDate` and `LastModifiedDate` fields in UTC 24-hour format.

SEE ALSO:

[Salesforce Help: Manage Salesforce User Identities with SCIM \(can be outdated or unavailable during release preview\)](#)

## Get OAuth 2.0 Credentials for Consumers Associated with an External Client App

Use the new Connect API endpoints to get credentials for OAuth consumers of an external client app. The Consumer Credentials by App endpoint returns credentials for all consumers associated with an external client app. The Credentials by Consumer endpoint returns the OAuth consumer key, consumer secret, or both for a specific consumer.

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

**Who:** This feature is available to developers who have the View External Client App Consumer Secrets in Metadata permission in orgs where external client apps are enabled.

**How:** Enable External Client Apps by enabling Opt In to External Client Apps in Setup.

Enabling the external client apps OAuth plugin involves allowing access to OAuth consumer information. This information is sensitive and confidential. Never commit OAuth consumer data to source control. Retrieve the client ID and secret using this Connect REST API instead of a metadata pull. This separation makes it easier to avoid committing your private credentials to source control.

After the permissions are assigned, configure a Salesforce DX project to develop external client apps. If you plan to create packageable external client apps, all developments must take place in a developer hub org.

## Configure an OAuth 2.0 Client Credentials Flow for an External Client App

Exchange your external client app's OAuth 2.0 consumer key and secret for an access token with the client credentials flow. Use the new metadata fields to set up an OAuth 2.0 client credentials flow for your external client app.

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

**Who:** This feature is available to developers who have the View External Client App Consumer Secrets in Metadata permission in orgs where external client apps are enabled.

**How:** Enable External Client Apps by enabling Opt In to External Client Apps in Setup.

Enabling the external client apps OAuth plugin involves allowing access to OAuth consumer information. This information is sensitive and confidential. Never commit OAuth consumer data to source control. Assign the View External Client App Consumer Secrets in Metadata user permission to a permission set.

After the permissions are assigned, configure a Salesforce DX project to develop external client apps. If you plan to create packageable external client apps, all developments must take place in a developer hub org.

SEE ALSO:

[Salesforce Help: Configure an External Client App for OAuth 2.0 Client Credentials Flow \(can be outdated or unavailable during release preview\)](#)

## Configure an OAuth 2.0 Device Flow for External Client Apps

Use the new `isDeviceFlowEnabled` field to control enable OAuth 2.0 device flow for an external client app.

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

**Who:** This feature is available to developers in orgs where external client apps are enabled who have the View External Client App Consumer Secrets in Metadata permission.

**How:** Enable External Client Apps by enabling Opt In to External Client Apps in Setup.

Enabling the external client apps OAuth plugin involves allowing access to OAuth consumer information. This information is sensitive and confidential. Never commit OAuth consumer data to source control. Assign the View External Client App Consumer Secrets in Metadata user permission to a permission set.

After the permissions are assigned, configure a Salesforce DX project to develop external client apps. If you plan to create packageable external client apps, all developments must take place in a developer hub org.

SEE ALSO:

[Salesforce Help: Configure OAuth 2.0 Device Flow for External Client Apps \(can be outdated or unavailable during release preview\)](#)

## Configure an OAuth 2.0 JWT Bearer Flow for External Client Apps

Use external client apps as part of your continuous integration system. Add a digital certificate to the new certificate field in the external client apps global OAuth settings file. With this certificate, you can create a JWT flow for an external client app.

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

**Who:** This feature is available to developers in orgs where external client apps are enabled who have the View External Client App Consumer Secrets in Metadata permission.

**How:** Enable External Client Apps by enabling Opt In to External Client Apps in Setup.

Enabling the external client apps OAuth plugin involves allowing access to OAuth consumer information. This information is sensitive and confidential. Never commit OAuth consumer data to source control. Assign the View External Client App Consumer Secrets in Metadata user permission to a permission set.

After the permissions are assigned, configure a Salesforce DX project to develop external client apps. If you plan to create packageable external client apps, all developments must take place in a developer hub org.

SEE ALSO:

[Salesforce Help: Configure OAuth 2.0 JWT Bearer Flow for External Client Apps \(can be outdated or unavailable during release preview\)](#)



## Disable or Enable an External Client App Plugin

Use the new ExtlClntAppConfigurablePolicies metadata type to control the plugins for an external client app. You can disable the entire external client app and all of its plugins at once or disable just the OAuth plugin.

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

**Who:** This feature is available to developers in orgs where external client apps are enabled who have the View External Client App Consumer Secrets in Metadata permission

**How:** Enable External Client Apps by enabling Opt In to External Client Apps in Setup.

Enabling the external client apps OAuth plugin involves allowing access to OAuth consumer information. This information is sensitive and confidential. Never commit OAuth consumer data to source control. Assign the View External Client App Consumer Secrets in Metadata user permission to a permission set.

After the permissions are assigned, configure a Salesforce DX project to develop external client apps. If you plan to create packageable external client apps, all developments must take place in a developer hub org.

SEE ALSO:

[Salesforce Help: Enable or Disable External Client App Plugins \(can be outdated or unavailable during release preview\)](#)

## MFA Auto-Enablement Concludes for All Remaining Orgs (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 has been automatically enabling MFA for production orgs via the MFA Auto-Enablement Release Update. The first phase of this process started in Spring '23. The fourth and final phase goes into effect when Spring '24 rolls out. The final phase includes all orgs that weren't previously auto-enabled.

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

**When:** If the MFA Auto-Enablement Release Update is visible in the Release Update node in Setup after Winter '24 finished rolling out, your org is scheduled for auto-enablement 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:** The release update automatically turns on this setting: Require multi-factor authentication (MFA) for all direct UI logins to your Salesforce org. The release update usually takes effect when your org is updated to Spring '24, but in some cases a delay of several hours to a few days is possible before MFA is auto-enabled for your users.

Users who have the Multi-Factor Authentication for User Interface Logins user permission experience no changes when MFA is auto-enabled for an org.

When MFA is turned on, the process for logging in to the UI changes. After a user enters their username and password, they must verify their identity with an MFA verification method such as an authenticator app, security key, or built-in authenticator. If users haven't done so already, they're prompted to register a verification method the next time they log in after this release update goes into effect.

To prepare for this update, we recommend taking these steps.

- Verify whether your org has exempt user types that must be manually excluded from MFA before MFA auto-enablement occurs. See [Exclude Exempt Users from MFA](#) in Salesforce Help.
- Train your users on how to acquire, register, and log in with MFA verification methods. See [Change Management for a Successful MFA Rollout](#) for guidance and customizable templates.

If your users aren't prepared to start using MFA when Salesforce auto-enables it, you have two options.

- Your users can skip MFA registration for 30 days and 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 MFA is contractually required, so re-enable it as soon as possible.

To disable MFA, deselect **Require multi-factor authentication (MFA) for all direct UI logins to your Salesforce org** on the Identity Verification page in Setup.

#### SEE ALSO:

[MFA Enforcement for Salesforce Orgs Is Shifting to In-App Notifications Starting in Summer '24](#)

[MFA Is Turned On by Default Starting April 2024](#)

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

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

## UI Text Improvements for the MFA Registration Experience

To improve the user experience when registering verification methods for multi-factor authentication (MFA), some text in the user interface has been updated.

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

#### How:

- On the Choose a Verification Method screen, the authenticator app option provides better context by listing some common third-party apps.
- The Connect Salesforce Authenticator screen is simplified. For more detailed guidance, users can now view a tutorial video from the screen.
- The Connect an Authenticator App screen is simplified.

## Salesforce Authenticator Is Disabled for External Users in Newly Created Orgs

For orgs created in Spring '24 or later, the Salesforce Authenticator mobile app is no longer available by default for external users. To enable it, contact Salesforce Customer Support. Because external users can only access your Experience Cloud sites, their accounts pose a lower security risk in the event that they're compromised. This change helps improve Salesforce Authenticator's service availability for internal users, who access the Salesforce UI directly. Orgs created before Spring '24 aren't affected by this change.

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

## Revert Seamlessly to One-Time Passcodes for Identity Verification in Salesforce Authenticator

If your users can't receive push notifications in the Salesforce Authenticator mobile app, they can verify their identity using the app's time-based one-time password (TOTP) feature. To minimize delays for users who log in with multi-factor authentication (MFA), we streamlined the user experience for TOTP verification even more. When Salesforce detects that push notifications are unavailable because of a service issue, users are automatically redirected to the TOTP verification screen. And when users click the Having Trouble? link, they're taken directly to the TOTP verification screen without additional steps.

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

SEE ALSO:


[Salesforce Help: Use TOTP Codes When Push Notifications Are Unavailable in Salesforce Authenticator \(can be outdated or unavailable during release preview\)](#)

## Update the Salesforce Authenticator App to Version 4.1 in Summer '24

Salesforce is increasing the minimum supported app version for Salesforce Authenticator in Summer '24. With this update, your users can receive push notifications for identity verification only in version 4.1 or higher. Users running an app version below 4.1 can continue verifying their identity with the app's time-based one-time password (TOTP) feature. The release of Salesforce Authenticator version 4.1 is targeted for March 2024. Direct your users to the Apple App Store (iOS) or Google Play (Android) to update their Salesforce Authenticator app.

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

**When:** This change goes into effect with Summer '24.

 **Note:** Salesforce Authenticator version 4.1 doesn't become available until March 2024. The timeline for future app releases can be subject to change.

**How:** Beginning in Summer '24, when users log in with an outdated version of Salesforce Authenticator, Salesforce notifies them that their app needs an update. To finish logging in, users are required to enter a 6-digit TOTP code from the app instead of approving a push notification.

Users who access your org via [Lightning Login](#) are also affected by this update. When push notifications are unavailable in Salesforce Authenticator, Lightning Logins revert to the standard username-password login flow.

After users update to Salesforce Authenticator version 4.1 or higher, the app's full functionality is restored.

SEE ALSO:

[Salesforce Help: Use TOTP Codes When Push Notifications Are Unavailable in Salesforce Authenticator \(can be outdated or unavailable during release preview\)](#)

## Use Email Verifications to Back Up and Restore Connected Accounts in Salesforce Authenticator

With Salesforce Authenticator version 4.0, the backup and restore feature has a new setup process. When users back up and restore their connected accounts, the app verifies their email address instead of their mobile number. To complete the verification, users enter a 6-digit code received in an email. This method is more secure than SMS-based verification. Users can still restore preexisting backups with their mobile number if they haven't yet verified their email address.

SEE ALSO:

[Salesforce Help: Back Up Your Connected Accounts in the Salesforce Authenticator Mobile App \(can be outdated or unavailable during release preview\)](#)


[Salesforce Help: Restore Connected Accounts in the Salesforce Authenticator Mobile App \(can be outdated or unavailable during release preview\)](#)

## Stay on Top of Push Notifications for Salesforce Authenticator

Having trouble getting push notifications from Salesforce Authenticator? Check whether notifications are enabled right from the Salesforce Authenticator app and turn them on with a one-tap link to your device settings. To ensure that you get notifications when you're in Focus mode, push notifications are now time-sensitive.

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

**When:** This change is available in Salesforce Authenticator version 4.1.0 and later.

**How:** To check whether you have push notifications enabled, in the Salesforce Authenticator app, tap . Your notification status is displayed under Push Notifications. To manage notifications, tap **Change in Settings**. Salesforce Authenticator redirects you to your device settings, where you can turn on push notifications. For iOS, make sure that time-sensitive notifications are turned on.

SEE ALSO:

[Salesforce Help: Manage Push Notifications for Salesforce Authenticator](#)

[Salesforce Help: Salesforce Authenticator Troubleshooting](#)

## Terminate a User's UI Sessions Automatically When Resetting Their Password

You can configure your org to automatically terminate all of a user's UI sessions when you reset that user's password. This setting helps to quickly mitigate security incidents such as stolen passwords or credential stuffing attacks. In case an attacker manages to access a user's account, the attacker's session ends as soon as you reset the password for the account. This setting also applies when you reset passwords for multiple users at once.

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

**How:** From the Session Settings Setup page, in the Session Settings section, enable **Terminate all of a user's sessions when an admin resets that user's password**.

SEE ALSO:

[Salesforce Help: Modify Session Security Settings \(can be outdated or unavailable during release preview\)](#)

## Login History Entries Are Reduced When Login Rate Limiting Is Active

When a user exceeds 3,600 login requests per hour and triggers login rate limiting, Salesforce reduces the number of new Login History entries for that user. When the user's login request rate falls back below 3,600 per hour and rate limiting ends, Salesforce resumes the standard behavior of recording an entry for each individual login request. Login rate limiting is typically triggered only by API integration users.

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

**Why:** Occasionally, due to malfunctioning or malicious scripts, API integration users make repeated failed attempts to log in to an org, exceeding the login rate limit. Prior to this update, the Login History page continued recording entries for each individual login request after rate limiting began for the user, causing excessive data demand and performance issues for some customers.

SEE ALSO:

[Knowledge Article: Sign In Error 'Login Rate Exceeded'](#)

[Salesforce Help: Monitor Login History \(can be outdated or unavailable during release preview\)](#)

## Set Up Registration and Login for Pay Now

To simplify Pay Now purchases, set up registration and login with one-click checkout.

**Where:** This change applies to Pay Now in Enterprise and Unlimited editions.

SEE ALSO:

[Register and Log In Customers with One-Click Checkout](#)

## Upgrade to Identity Connect 7.1.6

To get the latest security enhancements, upgrade from your current version of Identity Connect to Identity Connect 7.1.6. Identity Connect 7.1.6 adds to the extensive security improvements introduced in Identity Connect 7.1.1. If you're using Identity Connect 2.1 or Identity Connect 3.0.X.X, we recommend that you upgrade to Identity Connect 7.1.6 as soon as possible. As of the Winter '22 release, you can no longer download Identity Connect 2.1 and Identity Connect 3.0.X.X.

**Where:** This change applies to Lightning Experience and Salesforce Classic and is available for an additional cost in Enterprise, Performance, and Unlimited editions. Developer edition includes 10 Identity Connect permission set licenses.

**How:** To install Identity Connect 7.1.6, 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.

## Receive Additional Status Information During Headless Forgot Password Flow

Salesforce now sends the client a `status` parameter in addition to the `status_code` parameter during the Headless Forgot Password flow success message.

**Where:** This change is available in LWR, Aura, and Visualforce sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Unlimited, and Developer editions.

SEE ALSO:

[Salesforce Help: Headless Forgot Password Flow for Customers and Partners](#)

## See Password Resets in the Login History

To make it easier to track users' password changes, the Login Subtype column in the Login History now displays `Change Password` when a user resets their password. Previously, the Login History logged password resets as GET requests, but there was no way to differentiate between password resets and other types of GET requests.

**Where:** This change applies to Lightning Experience and Salesforce Classic (not available in all orgs) in all editions.

**How:** From Setup, in the Quick Find box, enter `Login History`, and then select **Login History**. Create a view that includes the Login Subtype.

## Named Credentials

Configure external credentials using the Basic authentication protocol. Manage and share named credential configurations between development, test, and production environments with managed 2GP and unlocked packages. Explore expanded support for formula functions in custom headers and improvements to sandbox cloning and org migrations for named credentials.

### [Use the Basic Authentication Protocol with Named Credentials](#)

Configure external credentials to use the Basic authentication protocol, and authenticate directly into the external system with a username and password. The new Basic authentication protocol combines the security of the enhanced named credential schema with the functionality of the legacy named credential Password authentication protocol.

### [Distribute Named Credentials with Second-Generation Managed and Unlocked Packages](#)

Add named credential and external credential components to second-generation managed packages (managed 2GP) and unlocked packages for distribution across development, test, and production environments. Manage more of your named credential configurations in your preferred source control repository, and then share named credentials across all of your orgs or distribute them via AppExchange. Previously, the named credential component was supported in managed 2GP and unlocked packages but not the external credential component.

### [Do More with Named Credential Formula Functions](#)

To help you work with unique or proprietary authentication methods, the `SIGN` and `SIGN_WITH_CERTIFICATE` formula functions are now supported values for named credential and external credential custom headers. And the `$(Credential.Endpoint.URL)` variable is now supported when you use formulas to construct the HTTP headers and request bodies of callouts to endpoints that are specified as named credentials.

### [Experience Improvements to Sandbox Cloning and Org Migrations for Named Credentials](#)

Now you can more easily manage named credential configurations across sandbox and production environments. When you clone a sandbox, named credential and external credential parameters are included so that the new sandbox connects to the same external systems. And the user external credentials that store encrypted access tokens are included in org migrations so that users can still use named credentials to make authenticated callouts.

## Use the Basic Authentication Protocol with Named Credentials

Configure external credentials to use the Basic authentication protocol, and authenticate directly into the external system with a username and password. The new Basic authentication protocol combines the security of the enhanced named credential schema with the functionality of the legacy named credential Password authentication protocol.

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

**How:** When you create an external credential from the Salesforce UI, select **Basic Authentication** as the authentication protocol. Then, create the external credential's principal and specify the identity type to use.

- To authenticate to the external system on behalf of your users, choose the **Named Principal** identity type.
- To allow each user accessing the external system to manage their own username and password, choose the **Per User** identity type.

You can also use the Metadata, Tooling, and Apex ConnectApi APIs to create and edit external credentials.

SEE ALSO:

[Salesforce Help: Create and Edit a Basic Authentication External Credential \(can be outdated or unavailable during release preview\)](#)

## Distribute Named Credentials with Second-Generation Managed and Unlocked Packages

Add named credential and external credential components to second-generation managed packages (managed 2GP) and unlocked packages for distribution across development, test, and production environments. Manage more of your named credential configurations in your preferred source control repository, and then share named credentials across all of your orgs or distribute them via AppExchange. Previously, the named credential component was supported in managed 2GP and unlocked packages but not the external credential component.

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

SEE ALSO:

[Named Credentials Developer Guide: Named Credentials Packaging Guide \(can be outdated or unavailable during release preview\)](#)

## Do More with Named Credential Formula Functions

To help you work with unique or proprietary authentication methods, the `SIGN` and `SIGN_WITH_CERTIFICATE` formula functions are now supported values for named credential and external credential custom headers. And the `$(Credential.Endpoint.URL)` variable is now supported when you use formulas to construct the HTTP headers and request bodies of callouts to endpoints that are specified as named credentials.

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

SEE ALSO:

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

## Experience Improvements to Sandbox Cloning and Org Migrations for Named Credentials

Now you can more easily manage named credential configurations across sandbox and production environments. When you clone a sandbox, named credential and external credential parameters are included so that the new sandbox connects to the same external systems. And the user external credentials that store encrypted access tokens are included in org migrations so that users can still use named credentials to make authenticated callouts.

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

SEE ALSO:

[Salesforce Help: Considerations for Named Credentials \(can be outdated or unavailable during release preview\)](#)

## Privacy Center

Save time and copy your Privacy Center policy configurations to and from your sandbox and production orgs. Automatically run any Right to Be Forgotten policies in your queue every 24 hours. Get more information on why a job failed with the new Related tab on policy jobs. Read and write consent information between your preference forms and Data Cloud in Preference Manager (beta). Add a universal unsubscribe option to your preference forms.

### [Automatically Run Right to Be Forgotten Jobs](#)

Save time when you enable the Right to Be Forgotten Daily Job and let policy jobs run every 24 hours. Instead of manually running each job, your policies are automatically put in a queue that runs every day.

### [View Error Details for Failed Policy Jobs](#)

Get more information on why a policy job failed in Privacy Center with detailed error messages.

### [Copy Privacy Center Policies Between Sandbox and Production Orgs](#)

Import and export your policy configurations between sandbox and production orgs. Copy policies instead of manually recreating policies that you configured and tested in another environment.

### [Share Data Between Preference Manager and Data Cloud \(Beta\)](#)

Create a subscription consent template for Data Cloud (beta) so you can load consent data from Data Cloud into the preference forms your users see. When your users submit their preferences, the updated consent data is synced to Data Cloud.

### [Add an Unsubscribe All Button to Preference Forms](#)

Give users an efficient way to unsubscribe from all communications by making one selection on a preference form.

### [UI Text and Functionality Improvements in Privacy Center](#)

To improve the user experience in Privacy Center, we updated the user interface text in several places. We also changed the behavior of two privacy policy filter operators.

### [Permission Requirements for the Consent Event Stream Are Enforced](#)

To receive notifications via the Consent Event Stream, users need either the ReadAllData or the PrivacyDataAccess permission assigned to them. Previously, this requirement was documented but not enforced. To resolve any disruptions that your users experience as a result of this change, assign one of the applicable permissions to them.

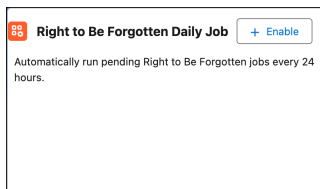
## Automatically Run Right to Be Forgotten Jobs

Save time when you enable the Right to Be Forgotten Daily Job and let policy jobs run every 24 hours. Instead of manually running each job, your policies are automatically put in a queue that runs every day.

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

**Who:** This change is available to users with the Privacy Center add-on subscription.

**How:** From the Privacy Center app home page, in the Right to Be Forgotten Daily Job tile, click **Enable**.



SEE ALSO:

[Salesforce Help: Create and Run a Right to Be Forgotten Request \(can be outdated or unavailable during release preview\)](#)

## View Error Details for Failed Policy Jobs

Get more information on why a policy job failed in Privacy Center with detailed error messages.

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

**Who:** This change is available to users with the Privacy Center add-on subscription.

**How:** From the Privacy Center app home page, go to the Privacy Job Session tab. Select the name of the failed policy job that you want more information about. Click the **Related** tab. Under Failures, use the Error Message column to see details on why the job failed.

SEE ALSO:

[Salesforce Help: View Policy Job Sessions \(can be outdated or unavailable during release preview\)](#)



## Copy Privacy Center Policies Between Sandbox and Production Orgs

Import and export your policy configurations between sandbox and production orgs. Copy policies instead of manually recreating policies that you configured and tested in another environment.

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

**Who:** This change is available to users with the Privacy Center add-on subscription.

**How:** From the Privacy Center app home page, click the **Privacy Policies** tab, and then click **Import or Export**. Salesforce shows you an Apex page. Follow the instructions to export your policy configuration from your source org, and import the configuration into your target org.

SEE ALSO:

[Salesforce Help: Import and Export Privacy Policies Between Orgs \(can be outdated or unavailable during release preview\)](#)

## Share Data Between Preference Manager and Data Cloud (Beta)

Create a subscription consent template for Data Cloud (beta) so you can load consent data from Data Cloud into the preference forms your users see. When your users submit their preferences, the updated consent data is synced to Data Cloud.

**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 Data Cloud license and Privacy Center add-on subscription.

**How:** In Preference Manager, click **Consent Templates**, then click **New Consent Template**. Select the **Data Cloud (Beta)** tab, then click **Subscription** to create a subscription consent template. Create a preference form using your published Data Cloud (beta) subscription template.

**New Consent Template**

Create a template for the type of consent you want to store. Consent templates capture preferences drawn from your brands, data use purposes, and consent channels.

Core **Data Cloud (Beta)**

**Subscription**

Capture preferences for communication subscriptions. Consent preferences for this template are stored in the Communication Subscription Consent object.

Cancel Next

SEE ALSO:

[Salesforce Help: Use Data Cloud with Preference Manager \(Beta\) \(can be outdated or unavailable during release preview\)](#)

## Add an Unsubscribe All Button to Preference Forms

Give users an efficient way to unsubscribe from all communications by making one selection on a preference form.

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

**Who:** This change is available to users with the Privacy Center add-on subscription.

**How:** Create or edit a form in Preference Builder. In the Properties panel, go to the Unsubscribe All section to customize how users can unsubscribe from all communication options with one selection.

SEE ALSO:

[Salesforce Help: Customize Template-Based Forms in Preference Builder \(can be outdated or unavailable during release preview\)](#)

## UI Text and Functionality Improvements in Privacy Center

To improve the user experience in Privacy Center, we updated the user interface text in several places. We also changed the behavior of two privacy policy filter operators.

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

**How:**

- Review these changes in filter conditions for privacy policies.
  - The is before operator was renamed to: is within the last. This operator captures records whose date field is within a specified number of days before the policy execution date. For example, if the specified number of days is 45, then matching records need a date field that's within 45 days before the policy execution date. The new functionality better serves customer use cases.
  - The is after operator was renamed to: is beyond the last. This operator captures records whose date field is beyond a specified number of days before the policy execution date. For example, if the specified number of days is 45, then matching records need a date field that's more than 45 days before the policy execution date. The new functionality better serves customer use cases.
  - The Number of Days field was renamed to: Number of Days Relative to Policy Execution Date. This change clarifies the field's meaning.
  - The Preview field was renamed to: Summary. Additionally, we inserted a disclaimer that this field's content is for informational purposes and isn't valid Salesforce Object Query Language (SOQL).
- When a user applies the Permanently delete records setting to a privacy policy, a warning banner alerts the user about the setting's risks. This change helps customers avoid accidental data loss.

SEE ALSO:

[Salesforce Help: Add Filters and Conditions to Data Management Policies \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Manage Data Management Policies \(can be outdated or unavailable during release preview\)](#)

## Permission Requirements for the Consent Event Stream Are Enforced

To receive notifications via the Consent Event Stream, users need either the ReadAllData or the PrivacyDataAccess permission assigned to them. Previously, this requirement was documented but not enforced. To resolve any disruptions that your users experience as a result of this change, assign one of the applicable permissions to them.

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

**Who:** This change impacts users who received notifications via the Consent Event Stream without having the documented permissions assigned to them. Notifications are interrupted for those users.

**How:** To re-enable Consent Event Stream notifications, assign users the ReadAllData or PrivacyDataAccess permission with [permission sets](#) or [profiles](#).

SEE ALSO:

[Salesforce Help: Use the Consent Event Stream \(can be outdated or unavailable during release preview\)](#)

## Salesforce Backup

Back up data as you go with delta backups. And expand your backup policies to capture file and attachment data. You can export file and attachment backups for review and import them as needed.

### [Find Records More Efficiently When Restoring Backups](#)

You can now filter records by the date they were backed up or modified. You can also find records that a specific user modified, or go straight to one or more records by entering their unique 15-character or 18-character IDs. This change is available in version 2.15 of the Salesforce Backup managed package.

### [Back Up New Data On Demand](#)

Automated backups are convenient, but sometimes you want to back up before and after a major deployment. Maybe you're starting a large data entry project or finished importing data from a legacy system of record. With version 2.13 of the Salesforce Backup app, you can initiate backups and capture just the new data for peace of mind as you work.

### [Back Up Files and Attachments](#)

Files and attachments hold a trove of valuable data. Now, you can include files and attachments in backups with version 2.13 of the Salesforce Backup app. Choose a start date that suits your needs. File and attachment backups are available for export, which you can then import as needed.

### [Control Formula Field Data Backups at the Object Level](#)

Exercise more control over which objects you back up formula field data for by backing it up on an object-by-object basis. Previously, a global setting controlled formula field data for all objects enabled in a policy.

## Find Records More Efficiently When Restoring Backups

You can now filter records by the date they were backed up or modified. You can also find records that a specific user modified, or go straight to one or more records by entering their unique 15-character or 18-character IDs. This change is available in version 2.15 of the Salesforce Backup managed package.

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

**Who:** This change applies to editions that have the Backup and Restore add-on subscription.

**How:** In the Salesforce Backup app, on the Restore tab, choose an option under the Record Activity Date section. Or search for backups by a user's name or a record's ID.

**Set Restore Filters**

Start the restore process by finding backups that meet specific filter criteria.

[Show Backups](#)

**\*Data Categories**

Restore records and export files and attachments  
 Export files and attachments

**\*Select Object**

**\*Record change type**

Updated  
 Deleted  
 Both

**\*Record Activity Date**

System Modstamp  
 Backup Date

**\*Date Range**

Last 24 Hours  
 Last 7 Days  
 Last 30 Days  
 Custom

Last Modified By


Record IDs

## Back Up New Data On Demand

Automated backups are convenient, but sometimes you want to back up before and after a major deployment. Maybe you're starting a large data entry project or finished importing data from a legacy system of record. With version 2.13 of the Salesforce Backup app, you can initiate backups and capture just the new data for peace of mind as you work.

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

**Who:** This change applies to editions that have the Backup and Restore add-on subscription.

**How:** In the Salesforce Backup app, from the policy menu , select **Run Delta Backup**. A backup starts that captures only the new data and changed data since your last backup. The regularly scheduled daily backup still happens at 5 PM Central Time (GMT - 05:00).

## Back Up Files and Attachments

Files and attachments hold a trove of valuable data. Now, you can include files and attachments in backups with version 2.13 of the Salesforce Backup app. Choose a start date that suits your needs. File and attachment backups are available for export, which you can then import as needed.

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

**Who:** This change applies to editions that have the Backup and Restore add-on subscription.

**How:** In the Salesforce Backup app, on the Backup tab, click **Configure Policy Defaults**. Turn on the files and attachments default setting (1), and review how much file storage your files and attachments use (2). Keep this number in mind as you plan your backup strategy. Exporting files and attachments add to your total file usage. With your file storage strategy in mind, set your backup start date (3), and save your work.

To export file and attachment backups, go to the Restore tab. You can restore object data with the option to export files and attachments related to those objects while you're at it.

To export just files and attachments, select **Export files and attachments** and confirm your choice.

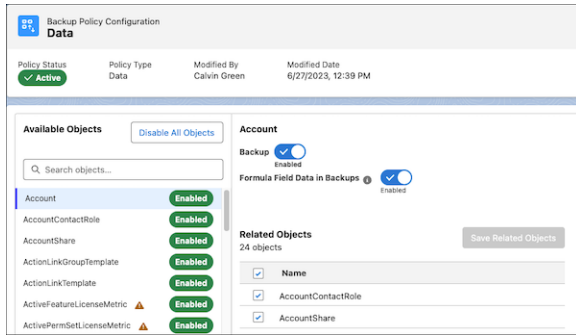
## Control Formula Field Data Backups at the Object Level

Exercise more control over which objects you back up formula field data for by backing it up on an object-by-object basis. Previously, a global setting controlled formula field data for all objects enabled in a policy.

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

**Who:** This change applies to editions that have the Backup and Restore add-on subscription.

**How:** In the Salesforce Backup app, on the Backup tab, select an object. Then enable or disable formula field data in backups.



SEE ALSO:

[Salesforce Help: Restore Data from a Backup](#)

## Salesforce Shield

Detect malicious guest user activity with the Guest User Anomaly Event. Shield Platform Encryption Setup pages have improved labeling and design for easier navigation. Access External Key Management in all commercial zones.

### [Event Monitoring](#)

Explore and download all of your Event Log File data using the Event Log File Browser (beta) in Setup. Know when a guest user in Experience Cloud attempts to maliciously extract data with a new Threat Detection event. Access 1 year's worth of event log file data with the Query Background Event Log Files permission. Government Cloud customers can query 1 year's worth of event log file data by default.

### [Shield Platform Encryption](#)

Spring '24 is all about making key management easier. All encryption policy controls and settings are now on a single page in Setup. Probabilistic and deterministic key types have clearer names. Encrypt personally identifiable information in Grantmaking records. External Key Management is available in all commercial zones.

## Event Monitoring

Explore and download all of your Event Log File data using the Event Log File Browser (beta) in Setup. Know when a guest user in Experience Cloud attempts to maliciously extract data with a new Threat Detection event. Access 1 year's worth of event log file data with the Query Background Event Log Files permission. Government Cloud customers can query 1 year's worth of event log file data by default.

### [See Detailed Information About Unusual Guest User Activity with the Guest User Anomaly Event](#)

Know when a guest user in Experience Cloud attempts to maliciously extract data through aura controllers with the new Guest User Anomaly Event from the Threat Detection app.

### [Access and Download Event Log File Data with the Event Log File Browser \(Beta\)](#)

Explore and download all of your Event Log File data using the Event Log File Browser (beta) in Setup.

### [Monitor Custom Component Usage with Custom Component Instrumentation API \(Generally Available\)](#)

Know what data is accessed in a custom component, how people interact with it, and how it performs by turning on Enable Lightning Logger Events.

### Query 1 Year's Worth of Event Log File Data

Government Cloud customers can now query 1 year's worth of Event Log File data if needed as part of a security incident response with the Query Background Event Log Files permission. Salesforce CSIRT must enable this permission.

## See Detailed Information About Unusual Guest User Activity with the Guest User Anomaly Event

Know when a guest user in Experience Cloud attempts to maliciously extract data through aura controllers with the new Guest User Anomaly Event from the Threat Detection app.

**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: Threat Detection \(can be outdated or unavailable during release preview\)](#)

## Access and Download Event Log File Data with the Event Log File Browser (Beta)

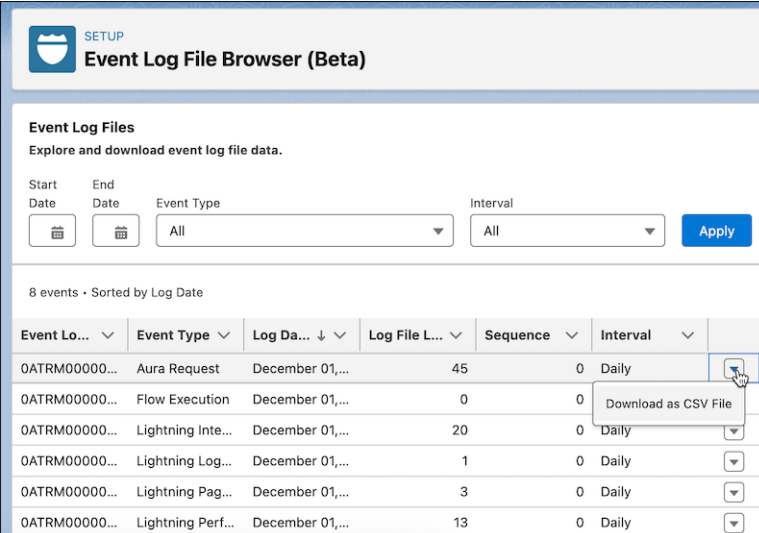
Explore and download all of your Event Log File data using the Event Log File Browser (beta) in Setup.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Event Monitoring is enabled.

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

**Who:** This change is available to customers who purchased Salesforce Shield or Salesforce Event Monitoring add-on subscriptions.

**How:** Access the Event Log File Browser (beta) in Setup. To download Event Log File data, select a date range and click the dropdown button to the right of the event log file and select **Download as CSV File**. Alternatively, use the File Download servlet by adding `/servlet/servlet.FileDownload?file=<ELF_ID_NUMBER>` after your org URL. For example, `https://mycompany.my.salesforce.com/servlet/servlet.FileDownload?file=0ATRM000000dcbH0A0`. The file download begins automatically.



**Event Log Files**  
Explore and download event log file data.

Start Date: [Calendar icon] End Date: [Calendar icon] Event Type: All Interval: All [Apply]

8 events - Sorted by Log Date

Event Lo...	Event Type	Log Da...	Log File L...	Sequence	Interval	
0ATRM00000...	Aura Request	December 01,...	45	0	Daily	Download as CSV File
0ATRM00000...	Flow Execution	December 01,...	0	0	Daily	
0ATRM00000...	Lightning Inte...	December 01,...	20	0	Daily	
0ATRM00000...	Lightning Log...	December 01,...	1	0	Daily	
0ATRM00000...	Lightning Pag...	December 01,...	3	0	Daily	
0ATRM00000...	Lightning Perf...	December 01,...	13	0	Daily	

## Monitor Custom Component Usage with Custom Component Instrumentation API (Generally Available)

Know what data is accessed in a custom component, how people interact with it, and how it performs by turning on Enable Lightning Logger Events.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Event Monitoring is enabled. The Lightning Logger event is available in the API but not in the Event Monitoring Analytics app.

**Who:** This change is available to customers who purchased Salesforce Shield or Salesforce Event Monitoring add-on subscriptions.

**How:** To turn on Enable Lightning Logger Events, go to Event Monitoring Settings in Setup.

SEE ALSO:

[Monitor Component Events with Custom Component Instrumentation API \(Generally Available\)](#)

## Query 1 Year's Worth of Event Log File Data

Government Cloud customers can now query 1 year's worth of Event Log File data if needed as part of a security incident response with the Query Background Event Log Files permission. Salesforce CSIRT must enable this permission.

**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 Government Cloud users who purchased Salesforce Shield or Salesforce Event Monitoring add-on subscriptions.

**How:** Data older than 1 month is hidden unless Salesforce CSIRT enables the Query Background Event Log Files permission.

[Generate Event Log Files by Default](#)

The Generate event log files setting is enabled for Government Cloud customers by default. They can query 1 year's worth of Event Log File data if needed as part of a security incident response.

## Generate Event Log Files by Default

The Generate event log files setting is enabled for Government Cloud customers by default. They can query 1 year's worth of Event Log File data if needed as part of a security incident response.

**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 Government Cloud users who purchased Salesforce Shield or Salesforce Event Monitoring add-on subscriptions.

**How:** Access this setting from Setup under Event Monitoring Settings.

## Shield Platform Encryption

Spring '24 is all about making key management easier. All encryption policy controls and settings are now on a single page in Setup. Probabilistic and deterministic key types have clearer names. Encrypt personally identifiable information in Grantmaking records. External Key Management is available in all commercial zones.



### [IdeaExchange Delivered: Use External Key Management in All Commercial Zones](#)

The Shield Platform Encryption External Key Management (EKM) service is available for use in all commercial zones. When you encrypt data with keys stored outside of Salesforce, you exercise more direct control over keys. You can also protect sensitive data while addressing data residency and regulatory requirements. With EKM, create a secure connection to AWS Key Management Service (KMS). Salesforce then uses your key stored in AWS KMS to encrypt and decrypt Salesforce data. We delivered this feature thanks to your ideas on IdeaExchange. EKM key pairs encrypt the same data that other keys in Salesforce encrypt, including standard and custom fields, CRM Analytics data, search indexes, and data stored in the event bus.

### [Configure Your Encryption Policy with Fewer Clicks](#)

The Shield Platform Encryption pages in Setup are streamlined to save you time when setting up and configuring your encryption policy. The new Encryption Settings page combines all encryption policy and advanced customization settings on one page. Now you can apply encryption to files and attachments, search indexes, and other data stores at the same time that you turn on other settings such as deterministic encryption. Previously, these settings were spread across separate Advanced Settings and Encryption Policy pages.

### [Enjoy Clearer Names for Probabilistic and Deterministic Tenant Secrets](#)

Tenant secrets that apply probabilistic and deterministic encryption schemes to your data now have clearer names. The new names in Setup, Fields and Files (Probabilistic) and Fields (Deterministic), don't change how your tenant secrets function. They more clearly define the data that each encryption scheme applies to.

### [Encrypt Financial Account Name and Number in Automotive Cloud](#)

Add another layer of security to your automotive loan and lease information. You can now encrypt the Name and Financial Account Number fields of the Financial Account object. The fields allow probabilistic, case-sensitive deterministic, and case-insensitive deterministic encryption schemes.

### [Encrypt Grantmaking Compliant Data Sharing Comments](#)

Grantmaking Compliant Data Sharing records sometimes contain sensitive or personally identifiable information (PII). You can now encrypt the Comments field on the Funding Opportunity Participant object.

### [Encrypt Nonprofit Cloud Payment Information](#)

Payment records contain sensitive or personally identifiable information (PII). You can encrypt the Bank Account Number field on the Payment Instrument object by using the probabilistic, case-sensitive deterministic, or case-insensitive deterministic encryption schemes. Encrypt the Last 4, Expiry Month, and Expiry Year fields on the Gift Entry object with the same schemes.

### [Encrypt Applicant and Application Form Fields](#)

Client application records sometimes contain sensitive or personally identifiable information (PII). On the Application Form object, you can now encrypt the Submission Date field. On the Applicant object, you can now encrypt Email, First Name, Last Name, Middle Name, Prefix, Suffix, Birth Date, Phone, and Unique Reference Number fields.

### [Encrypt Fields Used to Train Generative AI Models](#)

To help you meet compliance and regulatory requirements around the use of generative AI, you can encrypt data entered into natural language processing training models. Use Shield Platform Encryption to encrypt the Response and Additional Information fields on the AI Natural Language Process Chunk Result (AINtrlLangProcChunkRslt) and AI Natural Language Process Result (AINaturalLangProcessRslt) objects.



## Use External Key Management in All Commercial Zones

The Shield Platform Encryption External Key Management (EKM) service is available for use in all commercial zones. When you encrypt data with keys stored outside of Salesforce, you exercise more direct control over keys. You can also protect sensitive data while addressing data residency and regulatory requirements. With EKM, create a secure connection to AWS Key Management Service (KMS). Salesforce then uses your key stored in AWS KMS to encrypt and decrypt Salesforce data. We delivered this feature thanks to your ideas on IdeaExchange. EKM key pairs encrypt the same data that other keys in Salesforce encrypt, including standard and custom fields, CRM Analytics data, search indexes, and data stored in the event bus.

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

**Who:** Available to customers who purchased the Salesforce Shield or Shield Platform Encryption, and Cache-Only Key Service, add-on subscriptions. For product availability and purchasing information, contact your account executive.

SEE ALSO:

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

## Configure Your Encryption Policy with Fewer Clicks

The Shield Platform Encryption pages in Setup are streamlined to save you time when setting up and configuring your encryption policy. The new Encryption Settings page combines all encryption policy and advanced customization settings on one page. Now you can apply encryption to files and attachments, search indexes, and other data stores at the same time that you turn on other settings such as deterministic encryption. Previously, these settings were spread across separate Advanced Settings and Encryption Policy pages.

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

**Who:** Available to customers who purchased a Salesforce Shield or Shield Platform Encryption add-on subscription.

**How:** In Setup, go to the new Encryption Settings page. Settings for applying encryption to data stores are under the Encryption Policy section. Customizations that require extra steps or planning, such as encrypting individual fields, are under the Advanced Encryption Settings section.

**Shield Platform Encryption Settings**

**Encryption Policy**  
Choose which data you want to encrypt.

- Encrypt Files and Attachments**  
Encrypt files when they're attached to records or uploaded to Salesforce Files.  On
- Encrypt Chatter**  
Encrypt feed posts, questions and answers, link names, and all comments. Encrypt poll questions but not poll choices.  Off
- Encrypt Search Indexes**  
Encrypts search index files at rest.  On
- Encrypt Change Data Capture Events and Platform Events**  
Encrypt event messages at rest in the event bus. If you do not enable this setting, change events and platform events are not encrypted and are stored in clear text in the event bus.  On

**Advanced Encryption Settings**  
Apply advanced configurations and key management features that refine your encryption implementation.

- Encrypt Standard Fields**  
Encrypt individual standard fields and apply encryption schemes. [Select Fields](#)
- Restrict Access to Encryption Policy Settings**  
For encryption policy tasks, also require that admins have the Manage Encryption Keys permission.  Off
- Deterministic Encryption**  
Use deterministic encryption when you want to filter on encrypted data. Apply this scheme to specific fields from the Encryption Policy page.  On

SEE ALSO:

[Salesforce Help: Set Up Your Encryption Policy \(can be outdated or unavailable during release preview\)](#)

## Enjoy Clearer Names for Probabilistic and Deterministic Tenant Secrets

Tenant secrets that apply probabilistic and deterministic encryption schemes to your data now have clearer names. The new names in Setup, Fields and Files (Probabilistic) and Fields (Deterministic), don't change how your tenant secrets function. They more clearly define the data that each encryption scheme applies to.

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

**Who:** Available to customers who purchased a Salesforce Shield or Shield Platform Encryption add-on subscription.

**How:** New tenant secret names apply to new and existing tenant secrets. On the Key Management page, you can see existing keys on the Fields and Files (Probabilistic) and Fields (Deterministic). No action is needed on your part. To preserve automated key processes, API values for the TenantSecret `Type` field haven't changed.

Key Management Table [Key Management Help](#)

Encrypts field data using the deterministic encryption scheme.

Fields and Files (Probabilistic) **Fields (Deterministic)** Search Index Event Bus

[Generate Tenant Secret](#) [Bring Your Own Key](#) [Generate DEK](#)

Actions	Version	Tenant Secret Type	Status	Root Key	Key Material Source	Key Derivation	Created By	Last Modified By
<a href="#">Export</a>	3	Fields (Deterministic)	Active	—	HSM	✓	Admin User, 7/19/2023, 6:23 PM	Admin User, 7/19/2023, 6:23 PM
<a href="#">Destroy</a> <a href="#">Export</a>	2	Fields (Deterministic)	Archived	—	HSM	✓	Admin User, 3/13/2023, 3:39 PM	Admin User, 7/19/2023, 6:23 PM
<a href="#">Destroy</a> <a href="#">Export</a>	1	Fields (Deterministic)	Archived	—	HSM	✓	Admin User, 10/4/2022, 10:48 AM	Admin User, 3/13/2023, 3:39 PM

SEE ALSO:

[Salesforce Help: Manage Tenant Secrets by Type \(can be outdated or unavailable during release preview\)](#)

## Encrypt Financial Account Name and Number in Automotive Cloud

Add another layer of security to your automotive loan and lease information. You can now encrypt the Name and Financial Account Number fields of the Financial Account object. The fields allow probabilistic, case-sensitive deterministic, and case-insensitive deterministic encryption schemes.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Vehicle and Asset Finance is enabled.

**Who:** This change is available to customers who purchased Salesforce Shield or Shield Platform Encryption add-on subscriptions.

**How:** On the Encryption Settings page in Setup, click **Select Fields**. Then click **Edit**, and select **Name** and **Financial Account Number** on the Financial Account object.

SEE ALSO:

[Improve Security of Your Financial Account Data with Shield Platform Encryption](#)

[Salesforce Help: Which Standard Fields Can I Encrypt? \(can be outdated or unavailable during release preview\)](#)

## Encrypt Grantmaking Compliant Data Sharing Comments

Grantmaking Compliant Data Sharing records sometimes contain sensitive or personally identifiable information (PII). You can now encrypt the Comments field on the Funding Opportunity Participant object.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Grantmaking is enabled.

**Who:** This change is available to customers who purchased Salesforce Shield or Shield Platform Encryption add-on subscriptions.

**How:** On the Encryption Settings page, click **Select Fields**. Then click **Edit**, and select the Comments field of the Funding Opportunity Participant object. You can encrypt the Comments field with the probabilistic, case-sensitive deterministic, or case-insensitive deterministic encryption schemes on this object.

SEE ALSO:

[Salesforce Help: Which Standard Fields Can I Encrypt? \(can be outdated or unavailable during release preview\)](#)

## Encrypt Nonprofit Cloud Payment Information

Payment records contain sensitive or personally identifiable information (PII). You can encrypt the Bank Account Number field on the Payment Instrument object by using the probabilistic, case-sensitive deterministic, or case-insensitive deterministic encryption schemes. Encrypt the Last 4, Expiry Month, and Expiry Year fields on the Gift Entry object with the same schemes.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Nonprofit Cloud is enabled and is available with a Salesforce Shield or Shield Platform Encryption add-on subscription.

**How:** On the Encryption Settings page, click **Edit**, and then select the fields that you want to encrypt.

SEE ALSO:

[Salesforce Help: Which Standard Fields Can I Encrypt? \(can be outdated or unavailable during release preview\)](#)

## Encrypt Applicant and Application Form Fields

Client application records sometimes contain sensitive or personally identifiable information (PII). On the Application Form object, you can now encrypt the Submission Date field. On the Applicant object, you can now encrypt Email, First Name, Last Name, Middle Name, Prefix, Suffix, Birth Date, Phone, and Unique Reference Number fields.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Financial Services Cloud is enabled.

**Who:** This change is available to customers who purchased Salesforce Shield or Shield Platform Encryption add-on subscriptions.

**How:** On the Encryption Settings page, click **Select Fields**. Then click **Edit**, and select the fields of the Applicant and Application Form objects that you want to encrypt.

SEE ALSO:

[Salesforce Help: Which Standard Fields Can I Encrypt? \(can be outdated or unavailable during release preview\)](#)

## Encrypt Fields Used to Train Generative AI Models

To help you meet compliance and regulatory requirements around the use of generative AI, you can encrypt data entered into natural language processing training models. Use Shield Platform Encryption to encrypt the Response and Additional Information fields on the AI Natural Language Process Chunk Result (AINtrlLangProcChunkRslt) and AI Natural Language Process Result (AINaturalLangProcessRslt) objects.

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

**Who:** This change is available to customers who purchased Contracts AI or NLP Insights products, and Salesforce Shield or Shield Platform Encryption add-on subscriptions.

**How:** In Setup, navigate to the Encrypt Fields page. Click **Edit**, and select the fields that you want to encrypt. You can apply the probabilistic encryption schemes to these fields.

SEE ALSO:

[Salesforce Help: Which Standard Fields Can I Encrypt? \(can be outdated or unavailable during release preview\)](#)

## Security Center

View anomalous guest user activity right from the Threat Detection app in Security Center. Enjoy an enhanced user experience curated to your needs. Ensure comprehensive insight into all your rollout activities with additional system permissions.

### [Review Guest User Anomaly Threat Detection Data in Security Center](#)

Evaluate guest user threat detection data right from the Threat Detection app in Security Center.

### [Benefit from More Relevant Information in Security Center](#)

Enjoy an enhanced interface curated to your needs by only seeing tabs that are relevant to your Security Center permissions. Understand the context in which you have a permission by knowing if a permission set is session-based. Access accurate installation information for Managed Package metrics so you can easily determine who installed a package and who upgraded a package.

### [Monitor Additional System Permissions](#)

Ensure comprehensive insight into all your rollout activities with additional system permissions, including API Only User Access, Access Data Cloud Data Explorer, Allows User Access Data Cloud, and Allows User Access Data Cloud Setup Menu.

## Review Guest User Anomaly Threat Detection Data in Security Center

Evaluate guest user threat detection data right from the Threat Detection app in Security Center.

**Where:** This change applies to Enterprise, Performance, Unlimited, and Developer editions.

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

**How:** On the Summary page in the Security Center app, select **Threat Detection**. Or under the Monitoring category in the navigation bar, click **Threat Detection**.

SEE ALSO:

[Salesforce Help: Review Threat Detection Events \(can be outdated or unavailable during release preview\)](#)

## Benefit from More Relevant Information in Security Center

Enjoy an enhanced interface curated to your needs by only seeing tabs that are relevant to your Security Center permissions. Understand the context in which you have a permission by knowing if a permission set is session-based. Access accurate installation information for Managed Package metrics so you can easily determine who installed a package and who upgraded a package.

**Where:** This change applies to Enterprise, Performance, Unlimited, and Developer editions.

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

## Monitor Additional System Permissions

Ensure comprehensive insight into all your rollout activities with additional system permissions, including API Only User Access, Access Data Cloud Data Explorer, Allows User Access Data Cloud, and Allows User Access Data Cloud Setup Menu.

**Where:** This change applies to Enterprise, Performance, Unlimited, and Developer editions.

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

**How:** Monitor system permissions from your Security Center dashboard via the Permissions category in Security Overview.

SEE ALSO:

[Salesforce Help: Security Center Metrics \(can be outdated or unavailable during release preview\)](#)

## Other Security Changes

Update your trusted URLs for an upcoming change to the system-defined content security policy (CSP), and block untrusted cross-org redirections. Update your connected apps with newly required information for Google Firebase projects.

### [Update Your Content Security Policy \(CSP\) for Upcoming Changes](#)

To help prevent cross-site scripting (XSS) and other code injection attacks, Salesforce plans to update the system-defined trusted URLs in Winter '25. This change updates your content security policy (CSP), which controls which resources Lightning components, third-party APIs, and WebSocket connections can load. Prepare for this change by reviewing the impacted CSP directives via the new CSP Violations list. Then, to allow Salesforce to load those resources from URLs that you trust, update your trusted URLs and their CSP directives.

### [Allow Only Trusted Cross-Org Redirections \(Release Update\)](#)

To protect your users and network, limit redirections to other Salesforce orgs. Add the specific Salesforce org URLs that you trust to the Trusted URLs for Redirects allowlist. This update was first available in Winter '24.

### [Enter New Firebase Information for Android Push Notifications](#)

Because of a change in how Google handles push notifications for apps, Android mobile connected apps now collect the Admin SDK private key and project ID from a Google Firebase project.

### [XSS Protection Setting Was Removed](#)

Because the HTTP X-XSS-Protection response header is deprecated, we removed the Enable XSS Protection setting from the Session Settings Setup page and from Health Check. To help prevent cross-site scripting (XSS) and other code injection attacks, configure content security policy (CSP) directives for your Trusted URLs.

## Update Your Content Security Policy (CSP) for Upcoming Changes

To help prevent cross-site scripting (XSS) and other code injection attacks, Salesforce plans to update the system-defined trusted URLs in Winter '25. This change updates your content security policy (CSP), which controls which resources Lightning components, third-party APIs, and WebSocket connections can load. Prepare for this change by reviewing the impacted CSP directives via the new CSP Violations list. Then, to allow Salesforce to load those resources from URLs that you trust, update your trusted URLs and their CSP directives.

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

**When:** Salesforce plans to update the trusted URL format requirements in Winter '25. Salesforce deploys that release starting in August 2024 (sandboxes) and September 2024 (production).

**How:** From Setup, in the Quick Find box, enter *CSP Violations*, and then select **CSP Violations**. The CSP Violations list includes an entry for each unique combination of an external URL and CSP context with at least one CSP directive that's blocked when Salesforce implements this change. To update your trusted URLs and the related CSP directives, click **Manage Trusted URLs**.

URL ↑	Context	Images	Fonts	IFrames	Last Violation Date
https://content.example.com	Lightning	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	12/1/2023, 1:32 PM
https://example.com	Communities	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	12/1/2023, 1:31 PM
https://img.example.com	Communities	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	12/1/2023, 1:31 PM
https://photos.example.com	Communities	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	12/1/2023, 1:31 PM
https://photos.example.com	Lightning	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	12/1/2023, 1:31 PM
https://play.vidyard.com	Lightning	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	12/5/2023, 10:08 AM

SEE ALSO:

[Salesforce Help: Review and Resolve CSP Violations \(can be outdated or unavailable during release preview\)](#)

## Allow Only Trusted Cross-Org Redirections (Release Update)

To protect your users and network, limit redirections to other Salesforce orgs. Add the specific Salesforce org URLs that you trust to the Trusted URLs for Redirects allowlist. This update was first available in Winter '24.

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

**When:** Salesforce enforces this update in Summer '24. In orgs that received Winter '24 before October 2023, this release update was 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:** From Trusted URLs for Redirects in Setup, disable **Allow untrusted cross-org redirections** (available in Lightning only). Or you can set the `enableCrossOrgRedirects` field on the SecuritySettings metadata API type to `false`.

To review this update, from Setup, in the Quick Find box, enter *Release Updates*, and then select **Release Updates**. For Allow Only Trusted Cross-Org Redirections, follow the testing and activation steps.

SEE ALSO:

[Salesforce Help: Trust Redirections to Your Other Salesforce Orgs \(can be outdated or unavailable during release preview\)](#)  
[Release Updates](#)

## Enter New Firebase Information for Android Push Notifications

Because of a change in how Google handles push notifications for apps, Android mobile connected apps now collect the Admin SDK private key and project ID from a Google Firebase project.

**Where:** This change applies to mobile connected apps with Android push notifications. Connected apps can be created in Group, Professional, Enterprise, Essentials, Performance, Unlimited, and Developer editions.

**How:** Get the required information from your Firebase project in the Google Firebase Console. Then submit the information to your mobile connected app's settings in App Manager.

SEE ALSO:

[Update Your Android Mobile Connected App's Information for Push Notifications](#)  
[Salesforce Help: Configure Android Push Notifications \(can be outdated or unavailable during release preview\)](#)  
[Firebase FAQ: FCM features deprecated in June 2023](#)

## XSS Protection Setting Was Removed

Because the HTTP X-XSS-Protection response header is deprecated, we removed the Enable XSS Protection setting from the Session Settings Setup page and from Health Check. To help prevent cross-site scripting (XSS) and other code injection attacks, configure content security policy (CSP) directives for your Trusted URLs.

**Where:** This change applies to Lightning Experience and Salesforce Classic in Essentials, Personal, Contact Manager, Group, Professional, Enterprise, Performance, Unlimited, Developer, and Database.com editions. Trusted URLs are available in Enterprise, Performance, Developer, and Unlimited editions.

SEE ALSO:

[Salesforce Help: Manage Trusted URLs \(can be outdated or unavailable during release preview\)](#)  
[Salesforce Help: Security Health Check \(can be outdated or unavailable during release preview\)](#)

## Service

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Check out new features that enable customer service agents to work faster and more productively across customer service channels.



### [Einstein for Service](#)

Get Work Summaries and Service Replies for Chat and Email in more languages. See Knowledge Articles used to draft Service Replies from the console. Use conversation data to create Bot intents with Conversation Mining, now generally available.

### [Service Intelligence](#)

Reduce costs and improve customer service with new Service Intelligence features. Help agents predict the time, effort, and potential escalations it takes to close each case. Measure the effectiveness of your Knowledge articles with ROI and cost-saving metrics. Manage app installation and refreshes in one place and install version 3.0 of the Service Data Kit.

### [Channels](#)

Create enhanced SMS and Partner Messaging channels, wrap up calls and enhanced messaging sessions faster with Einstein Work Summaries, and more.

### [Knowledge](#)

Unify all your organizational knowledge within Salesforce for a fully integrated knowledge base and search experience. View and analyze Knowledge article engagement metrics across channels and contexts. Access an expanded list of video formats to enhance the capabilities of your knowledge articles.

### [Self-Service](#)

Self-Service provides an online support channel for your customers, allowing them to resolve their inquiries without contacting a customer service representative.

### [Service Catalog](#)

Create fulfillment automations faster, restrict access to catalog items, search for catalog items easily, and navigate your Service Catalog site effortlessly.

### [Routing](#)

Work efficiently and easily with the new Omni-Channel sidebar. Choose which tabs to display in Omni Supervisor and create custom Omni Supervisor tabs. Select multiple queues to monitor simultaneously and see the applied filter on the Supervisor Wallboard. Hide agents' identities in Voice and Messaging transcripts. Use Enhanced Omni-Channel in apps with standard navigation. Use status-based capacity to pause messaging sessions and keep track of the sessions you've paused.

### [Einstein for Feedback Management](#)

Create a variety of surveys designed for different goals and audiences, driven by generative AI. Ensure wider audience engagement by translating surveys into multiple languages using generative AI.

### [Simplify Text Data Analysis By Using Natural Language Processing \(NLP\) Services](#)

Analyze the text-based survey responses based on entities and keyphrases by using Natural Language Processing (NLP) Services. AWS integration offers flexibility in selecting the services like keyphrase and entity extraction. Access results easily in the Natural Language Processing Insights card, which you can drag to any lightning page. Ensure that Amazon Comprehend is enabled in your AWS account.

## Einstein for Service

Get Work Summaries and Service Replies for Chat and Email in more languages. See Knowledge Articles used to draft Service Replies from the console. Use conversation data to create Bot intents with Conversation Mining, now generally available.

### [Einstein Bots Release Notes Have Moved](#)

Einstein Bots is now part of Einstein Platform. Check out the Einstein section for the latest and greatest bot features and enhancements.

### [Enterprise Edition Support and New Name for Service Cloud Einstein Add-On License](#)

The Service Cloud Einstein and Einstein GPT for Service add-on licenses are now captured in one add-on license named Einstein for Service. Enterprise and Unlimited edition customers can purchase the add-on license, which provides access to key Einstein features. Previously, the add-on license was available only in Unlimited edition.

### [Einstein Classification and Work Summaries](#)

Use Work Summaries with Einstein Copilot to set Voice, Messaging, and Chat summaries from anywhere in the console. Work Summaries in Messaging and Chat channels now supports English, French, German, Italian, Japanese, and Spanish.

### [Einstein Conversation Mining](#)

Transform conversation data into service insights and build bot intents with Einstein Conversation Mining.

### [Einstein Knowledge Creation](#)

Use the power of generative AI to grow your knowledge base and provide efficient customer service experiences with Knowledge Creation, now generally available. Knowledge Creation now supports English, French, German, Italian, Japanese, and Spanish.

### [Einstein Reply Recommendations](#)

Supercharge agent productivity using generative AI with Einstein Service Replies for chat and email, and, Service Replies with Knowledge grounding in six languages, now generally available.

SEE ALSO:

[Einstein Features](#)

## Einstein Bots Release Notes Have Moved

Einstein Bots is now part of Einstein Platform. Check out the Einstein section for the latest and greatest bot features and enhancements.

SEE ALSO:

[Einstein Bots](#)

## Enterprise Edition Support and New Name for Service Cloud Einstein Add-On License

The Service Cloud Einstein and Einstein GPT for Service add-on licenses are now captured in one add-on license named Einstein for Service. Enterprise and Unlimited edition customers can purchase the add-on license, which provides access to key Einstein features. Previously, the add-on license was available only in Unlimited edition.

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

**When:** This change takes effect on February 29, 2024.

**Why:** The add-on license provides access to features including Einstein Work Summaries, Einstein Service Replies, Einstein Reply Recommendations, Einstein Case Classification Apps, Einstein Knowledge Creation, and Service AI Grounding.

**How:** You'll see the new add-on license name in Salesforce Help and release notes. If you're new to Einstein, contact your account executive to get started with Einstein for Service.

## Einstein Classification and Work Summaries

Use Work Summaries with Einstein Copilot to set Voice, Messaging, and Chat summaries from anywhere in the console. Work Summaries in Messaging and Chat channels now supports English, French, German, Italian, Japanese, and Spanish.

### [Use Work Summaries for Chat in More Languages](#)

Now generally available, Einstein Work Summaries for Live Chat supports five more languages: French, German, Italian, Japanese, and Spanish.

### [Use Work Summaries for Messaging Channels in More Languages](#)

Now generally available, Einstein Work Summaries for Messaging channels supports five more languages: French, German, Italian, Japanese and Spanish.

### [Close Cases More Efficiently with Work Summaries in Einstein Copilot \(Beta\)](#)

Saves agents time with quick, concise, AI-generated summaries of Voice, Messaging, and Chat transcripts. Use natural language to request summaries along with a Voice, Messaging, or Chat record ID from anywhere in the console.

#### SEE ALSO:

[Wrap Up Call and Enhanced Messaging Sessions Faster with Einstein Work Summaries](#)

[Close Out Enhanced Messaging Sessions Faster Using Einstein Work Summaries](#)

## Use Work Summaries for Chat in More Languages

Now generally available, Einstein Work Summaries for Live Chat supports five more languages: French, German, Italian, Japanese, and Spanish.

**Where:** This change applies to Live Chat conversations in Lightning Experience in Enterprise and Unlimited Editions with the Einstein for Service add-on license. To purchase the add-on, contact your Salesforce account executive.

**When:** This feature is available starting December 15, 2023.

**How:** Einstein detects the case language and drafts summaries accordingly. If Einstein can't detect the language, summaries are drafted in the user locale's language.

#### SEE ALSO:

[Salesforce Help: Use Work Summaries in the Console](#)

[Einstein Features](#)

## Use Work Summaries for Messaging Channels in More Languages

Now generally available, Einstein Work Summaries for Messaging channels supports five more languages: French, German, Italian, Japanese and Spanish.

**Where:** This change applies to Lightning Experience in Unlimited editions with Service Cloud Einstein. Einstein generative AI is available in Lightning Experience.

To purchase the Einstein for Service add-on, contact your Salesforce account executive.

**When:** This change applies as of February, 21 2024.

**How:** For Messaging sessions, Einstein detects the chat transcript language and drafts summaries accordingly. If Einstein can't detect the language, summaries are drafted in the [user locale's language](#).

#### SEE ALSO:

[Salesforce Help: Use Work Summaries in the Console](#)

[Einstein Features](#)

## Close Cases More Efficiently with Work Summaries in Einstein Copilot (Beta)

Saves agents time with quick, concise, AI-generated summaries of Voice, Messaging, and Chat transcripts. Use natural language to request summaries along with a Voice, Messaging, or Chat record ID from anywhere in the console.

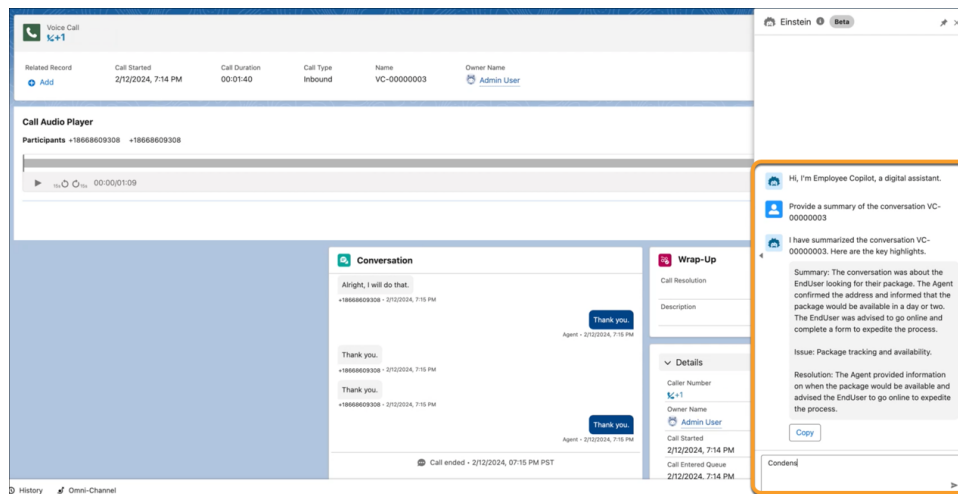
**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions with the Einstein for Service add-on. Einstein Copilot is included in Unlimited+. Setup for Einstein Copilot is available in Lightning Experience.

To purchase the Einstein for Service add-on, contact your Salesforce account executive.

**Note:** This feature is in beta and has limited functionality, as further described in the Documentation. It is part of the Services and will consume Einstein Requests if enabled and used.

**Who:** Users need the Use Einstein Copilot for Salesforce user permission to access Einstein Copilot and the Prompt Template User to run prompt templates and use the Summarize Record action.

**How:** To get summaries in copilot, first setup and launch Einstein Copilot. Then, turn on the Summarize Record copilot action. Finally, give your agents permission sets so they can use Work Summaries with Einstein Copilot.



When users ask Einstein to summarize a Voice, Messaging, or Chat record, the Summarize Record copilot action uses a Work Summaries prompt template to generate a summary, issue, and resolution. On the record page, Einstein Copilot recognizes natural language requests like "What is the summary of this conversation?" or "Give me a quick snapshot of this session." To get summaries from any page in the console, include the record ID in your request, such as "Give me a brief synopsis of MS-0000071" or "Summarize the chat id 0000071."

SEE ALSO:

[Salesforce Help: Show AI-Generated Summaries with Einstein Work Summaries](#)

[Launch Your Copilot Quickly with Standard Actions](#)

[Einstein Features](#)

[Salesforce Help: Einstein Generative AI](#)

## Einstein Conversation Mining

Transform conversation data into service insights and build bot intents with Einstein Conversation Mining.

[Get Service Insights and Build Bot Intents with Einstein Conversation Mining \(Generally Available\)](#)

Use Einstein Conversation Mining to transform conversation data into service insights and build bot intents. Einstein Conversation Mining replaces time-consuming transcript analysis that otherwise takes weeks.

### Get Service Insights and Build Bot Intents with Einstein Conversation Mining (Generally Available)

Use Einstein Conversation Mining to transform conversation data into service insights and build bot intents. Einstein Conversation Mining replaces time-consuming transcript analysis that otherwise takes weeks.

**Where:** This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions with the Service Intelligence add-on. Setup for Einstein Conversation Mining is available only in Lightning Experience.

**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 data set 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. Then, you can 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.

#### 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>	<b>12.72</b>	<b>10.19%</b>	<b>793</b>
Average Duration	Average Turns	of Chats	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>	<b>12.74</b>	<b>5.81%</b>	<b>452</b>
Average Duration	Average Turns	of Chats	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>	<b>12.8</b>	<b>5.43%</b>	<b>423</b>
Average Duration	Average Turns	of Chats	Chats

[View Details](#)

---

#### Topics

7 Topics containing 51 Contact Reasons from Chat Transcripts. Sorted by significance.

Download

---

**hotel, find**

<b>21.27%</b>	<b>1,656</b>	<b>5 min</b>	<b>23.05</b>
of Chats	Chats	Average Duration	Average Turns

[> 18 Contact Reasons](#)

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](#)

## Einstein Knowledge Creation

Use the power of generative AI to grow your knowledge base and provide efficient customer service experiences with Knowledge Creation, now generally available. Knowledge Creation now supports English, French, German, Italian, Japanese, and Spanish.

### [Grow Your Knowledge Base with Generative AI \(Generally Available\)](#)

Optimize agent productivity and efficiently grow your knowledge base with AI-generated article drafts. Capture important information in the flow of work from Messaging, Live Chat, or email conversations and from web cases. Einstein uses conversation transcripts to draft fluent, relevant knowledge articles that agents review, edit, and save.

### [Use Einstein Knowledge Creation in More Languages](#)

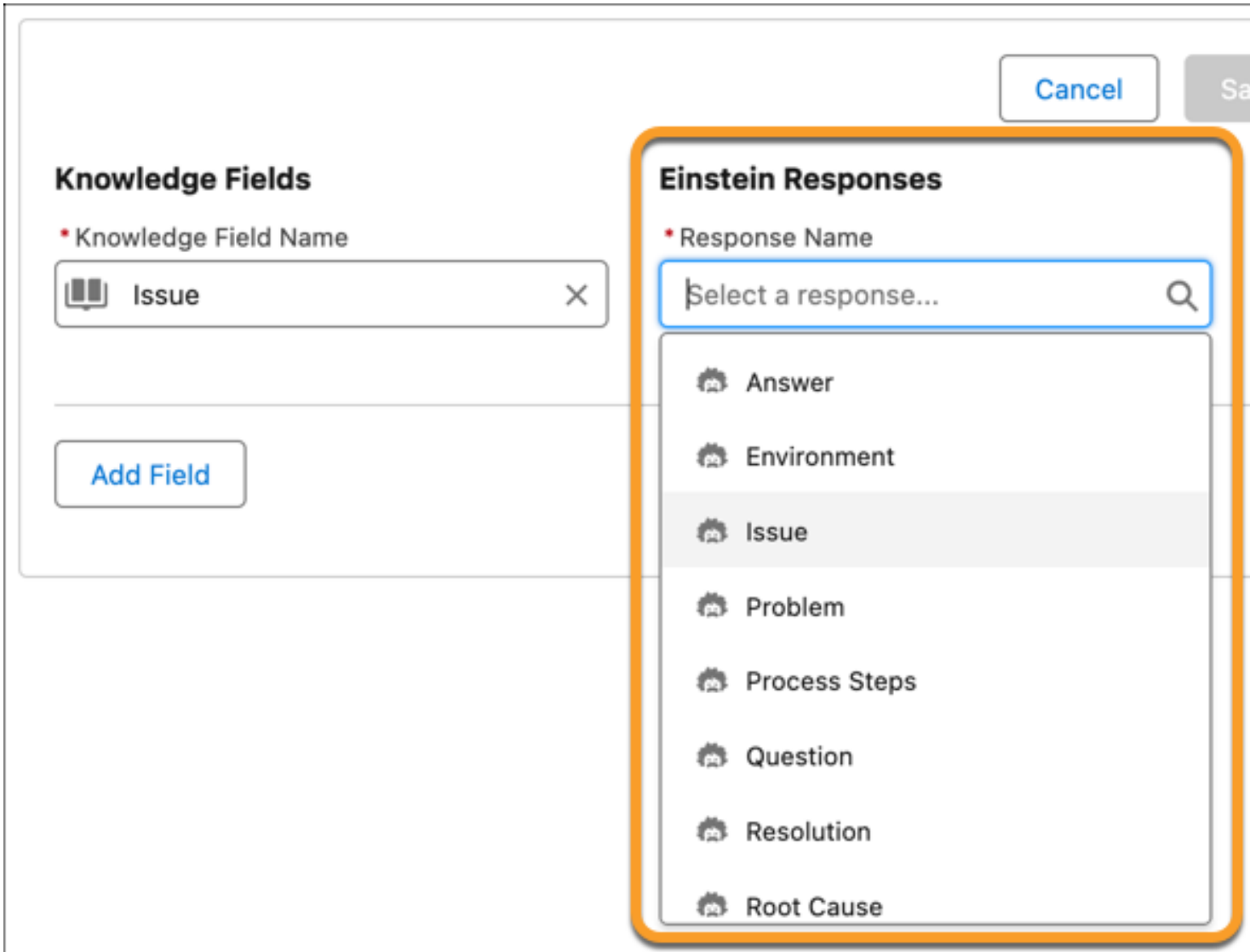
Now generally available, Einstein Knowledge Creation supports five more languages: French, German, Italian, Japanese, and Spanish. Previously, Knowledge Creation supported English only.

## Grow Your Knowledge Base with Generative AI (Generally Available)

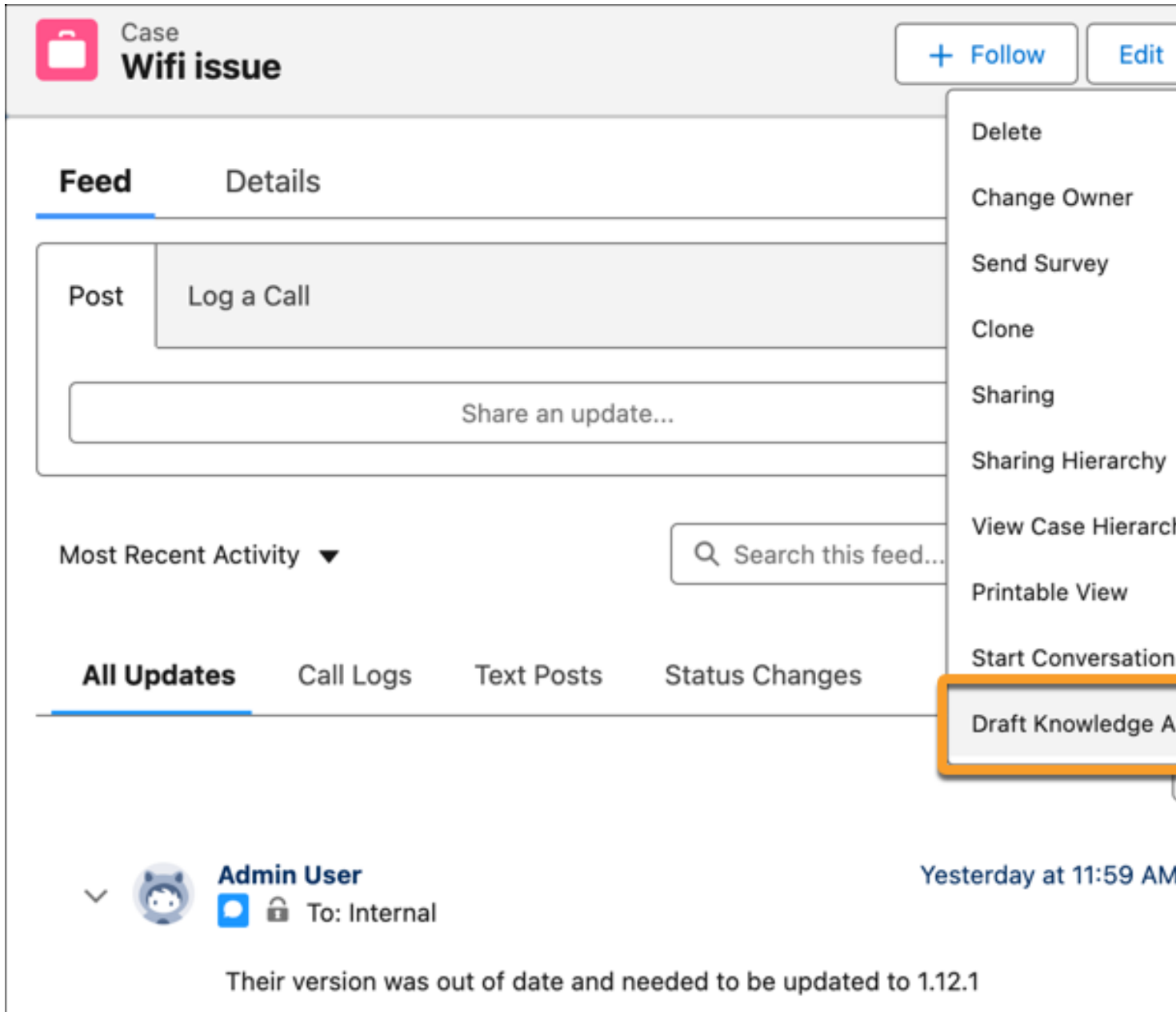
Optimize agent productivity and efficiently grow your knowledge base with AI-generated article drafts. Capture important information in the flow of work from Messaging, Live Chat, or email conversations and from web cases. Einstein uses conversation transcripts to draft fluent, relevant knowledge articles that agents review, edit, and save.

**Where:** This change applies to Unlimited and Enterprise editions with the Einstein for Service add-on. Einstein for Service is available in Lightning Experience.

**How:** In Setup, map Einstein response types to Knowledge fields. These mappings determine what type of information Einstein identifies and returns for your draft article.



Draft a knowledge article via a quick action on the Case page or from the Knowledge component for Messaging, Chat or Email conversations, and for web cases.



Edit and save your new article, and then send it for approval and publishing.

SEE ALSO:

[Salesforce Help: Einstein Knowledge Creation](#)

[Einstein Features](#)

[Salesforce Help: Einstein Generative AI](#)

### Use Einstein Knowledge Creation in More Languages

Now generally available, Einstein Knowledge Creation supports five more languages: French, German, Italian, Japanese, and Spanish. Previously, Knowledge Creation supported English only.




**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions with Service Cloud Einstein. Einstein generative AI is available in Lightning Experience.

To purchase the Einstein for Service add-on, contact your Salesforce account executive.

**When:** This change applies as of April 4, 2024.

**How:** The default knowledge base language is English. To activate other languages, in Knowledge Settings under Language Settings, select Multiple Languages.



The screenshot shows the 'Draft a Knowledge Article' interface. At the top, there is a header 'Draft a Knowledge Article'. Below it, a sub-header reads 'Create Knowledge Article'. A warning icon and text state: 'This tool uses generative AI, which can produce inaccurate or harmful responses. Check the output accuracy and safety before using.' The form contains three required fields, each with an information icon:

- Knowledge Record Type**: A dropdown menu with 'FAQ' selected.
- Title**: A text input field containing 'Connectivity and Router Issues'.
- Language**: A dropdown menu with 'English' selected. The dropdown is open, showing a list of languages: 'English' (with a checkmark), 'Japanese', and 'Italian'.

When drafting an article with Einstein, select the language from the dropdown menu. The drop-down only shows languages that are supported by Knowledge Creation and also active in your Knowledge Settings.

SEE ALSO:

[Salesforce Help: Einstein Knowledge Creation](#)

[Einstein Features](#)

[Salesforce Help: Einstein Generative AI](#)

## Einstein Reply Recommendations

Supercharge agent productivity using generative AI with Einstein Service Replies for chat and email, and, Service Replies with Knowledge grounding in six languages, now generally available.

### [Use Service Replies for Chat in More Languages](#)

Now generally available, Einstein Service Replies for Chat supports five more languages: French, German, Italian, Japanese, and Spanish.

### [Use Service Replies for Email in More Languages \(Generally Available\)](#)

Now Einstein Service Replies for Email supports five more languages: French, German, Italian, Japanese, and Spanish. Previously this feature was available in English only.

### [See the Knowledge Article Einstein Used to Draft Grounded Service Replies](#)

Help agents quickly focus in on relevant case information with links to knowledge articles from recommended replies. In a live chat or messaging session, Einstein shows which replies are based on knowledge articles in the replies component. To see the source article, click **Knowledge**.

## Use Service Replies for Chat in More Languages

Now generally available, Einstein Service Replies for Chat supports five more languages: French, German, Italian, Japanese, and Spanish.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited Editions with the Einstein for Service add-on license.

To purchase the add-on, contact your Salesforce account executive.

**When:** This feature is available starting December 15, 2023.

**How:** To use grounded replies in multiple languages you need multi-language enabled in your knowledge settings and at least one knowledge article in the language you want to use. For replies based on the conversation context, Einstein detects the language and drafts replies accordingly. So, if you start a conversation in Spanish, Einstein drafts and recommends replies to you in Spanish.

SEE ALSO:

[Salesforce Help: Service Replies for Chat in the Console](#)

[Einstein Features](#)

## Use Service Replies for Email in More Languages (Generally Available)

Now Einstein Service Replies for Email supports five more languages: French, German, Italian, Japanese, and Spanish. Previously this feature was available in English only.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions with Service Cloud Einstein. Einstein generative AI is available in Lightning Experience.

To purchase the Einstein for Service add-on, contact your Salesforce account executive.

**When:** This change applies as of March 14, 2024.

**How:** Einstein drafts email replies in the case language field. If the case language field is empty, Einstein detects the language based on case fields and then drafts email responses accordingly. Otherwise, replies are drafted in the [user locale's language](#).

SEE ALSO:

[Salesforce Help: Service Replies for Email in the Console](#)

[Einstein Features](#)

[Salesforce Help: Einstein Generative AI](#)

## See the Knowledge Article Einstein Used to Draft Grounded Service Replies

Help agents quickly focus in on relevant case information with links to knowledge articles from recommended replies. In a live chat or messaging session, Einstein shows which replies are based on knowledge articles in the replies component. To see the source article, click **Knowledge**.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited Editions with the Einstein for Service add-on license.

To purchase the add-on, contact your Salesforce account executive.

**When:** This feature is available starting December 15, 2023.

**How:** After you set up Service Replies for Chat and Service AI Grounding, Einstein uses your knowledge base to draft replies. When agents use replies in a live chat or messaging session, Einstein drafts and recommends relevant replies. Below each reply Einstein shows which replies are based on conversation context or knowledge. For replies based on knowledge articles, click the link to see the article Einstein used as a source for the reply.

The screenshot displays the Salesforce console interface. On the left, a knowledge article detail view is open, showing the following information:

- Article Record Type:** Article Number: 000001284, Publication Status: Published, Last Modified Date: 11/29/2023, 11:46 ...
- Version Number:** 1
- Buttons:** Edit as Draft, Copy Article Link
- Information Section:**
  - Title: Check order details
  - URL Name: 56bed22d3aeaaa14008c94c4
  - Article Record Type
  - Language: English
  - RTA

On the right, a chat interface is visible. A reply is shown with the text: "I can help you with that. To check your order status, you can log in to your account on our website and go to the 'Order History' section. There, you will be able to see the status of your order." Below this reply, a "Knowledge" link is highlighted with an orange box and an arrow pointing to the article detail view. Below the reply, a "Context" button is also highlighted with an orange box. The chat interface includes "Einstein Recommendations" and "Not Helpful" buttons.

From the article, agents can learn more about issue resolution, limitations, and considerations for an issue, to quickly provide their customers with the best information.

SEE ALSO:

[Salesforce Help: Service Replies for Chat in the Console](#)

[Einstein Features](#)

## Service Intelligence

Reduce costs and improve customer service with new Service Intelligence features. Help agents predict the time, effort, and potential escalations it takes to close each case. Measure the effectiveness of your Knowledge articles with ROI and cost-saving metrics. Manage app installation and refreshes in one place and install version 3.0 of the Service Data Kit.

### [Manage Your App Installation and Refreshes in One Place](#)

Go to one place to manage all the tasks associated with your apps. Install apps, view logs, reconfigure apps, or refresh apps. And, when you install an app, you can quickly see whether the installation was successful and troubleshoot any errors. Previously, these functions were in multiple places.

### [Monitor Knowledge Engagements Across Channels and Contexts](#)

Measure the effectiveness of your knowledge base and get recommendations on how to increase ROI with the Knowledge Effectiveness dashboard. Across all Service channels and Einstein products, find out how Knowledge is providing value through direct views or Knowledge-grounded generative AI content.

### [Help Agents Gauge Customer Effort](#)

Add the Customer Effort Score insight component to your case page layouts so your agents can see how much effort the customer is putting into the case, at a glance. Customer effort directly impacts customer satisfaction, so understanding this score helps level up your customer service.

### [Help Agents Predict Customer Escalations](#)

While working on cases, see AI-powered insights that estimate the likelihood customers will escalate their cases. Propensity to Escalate is a machine learning model built using Einstein Studio No Code Builder.

### [Apply Additional Service Assets in Data Cloud](#)

Bring more of your service data into Service Cloud with Service Data Kit version 3.0. This updated version includes Knowledge, Service Catalog, Incident Management, and Field Service data bundles with easy installation of knowledge, service catalog, entitlement, and incident assets. These data assets power Service Intelligence, a data-driven solution that shows key contact center performance metrics. You can also use the Service data kit outside of Service Intelligence to ingest service-related data to Data Cloud and build your own applications.

## Manage Your App Installation and Refreshes in One Place

Go to one place to manage all the tasks associated with your apps. Install apps, view logs, reconfigure apps, or refresh apps. And, when you install an app, you can quickly see whether the installation was successful and troubleshoot any errors. Previously, these functions were in multiple places.

**Where:** This change applies to Service Cloud in Lightning Experience in Enterprise and Unlimited editions for an additional cost.

**How:** In the Service Intelligence setup menu, installed versions of Service Intelligence are listed. View details about the app installation, including each task's success or failure, schedule app refreshes, or refresh the app instantly from the menu.

SEE ALSO:

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

## Monitor Knowledge Engagements Across Channels and Contexts

Measure the effectiveness of your knowledge base and get recommendations on how to increase ROI with the Knowledge Effectiveness dashboard. Across all Service channels and Einstein products, find out how Knowledge is providing value through direct views or Knowledge-grounded generative AI content.

**Where:** This change applies to Service Cloud in Lightning Experience in Enterprise and Unlimited editions for an additional cost.

**Who:** To use the Knowledge Effectiveness dashboard, you need the Service Intelligence User permission set. To manage Service Intelligence dashboards, you need the Service Intelligence Admin permission set.

**Why:** With the Knowledge Effectiveness dashboard, you can:

- Analyze article trends based on how often users engage with articles over time.
- View engagement metrics with legal documents and training materials to quickly assess whether your agents are meeting the compliance and training objectives set by your company.
- Clarify ROI and cost saving metrics, such as reduced average handling time (AHT) and case deflection, by differentiating who is engaging with an article.

**How:** If you have the Service data kit installed, upgrade or reinstall it to access the Knowledge bundle and the latest enhancements to Service Intelligence. After you upgrade the data kit, Data Cloud starts to capture Knowledge Article Engagement data from that time forward so that you can view engagement insights in your Knowledge dashboard.

SEE ALSO:

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

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

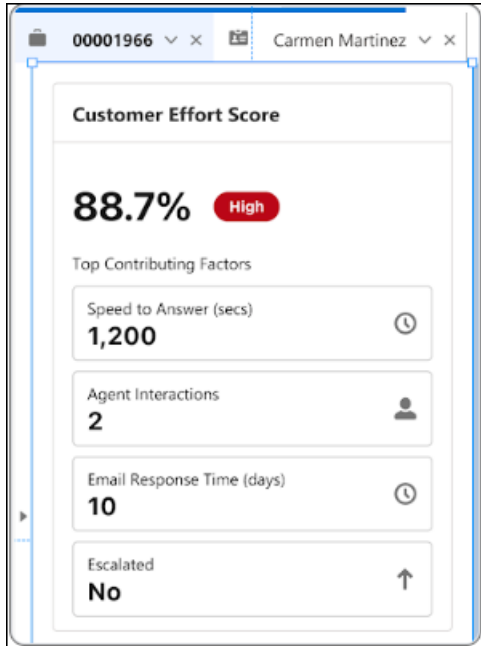
## Help Agents Gauge Customer Effort

Add the Customer Effort Score insight component to your case page layouts so your agents can see how much effort the customer is putting into the case, at a glance. Customer effort directly impacts customer satisfaction, so understanding this score helps level up your customer service.

**Where:** This change applies to Service Cloud in Lightning Experience in Enterprise and Unlimited editions for an additional cost.

**Who:** To use the Customer Effort Score insight, you need the Service Intelligence User permission set. To manage the Customer Effort Score Insight, you need the Service Intelligence Admin permission set.

**How:** Use Lightning App Builder to drag the Customer Effort Score component to a case or custom Lightning page.



SEE ALSO:

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

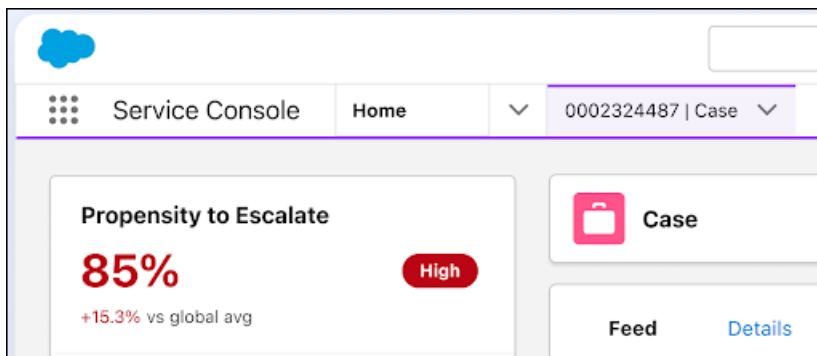
## Help Agents Predict Customer Escalations

While working on cases, see AI-powered insights that estimate the likelihood customers will escalate their cases. Propensity to Escalate is a machine learning model built using Einstein Studio No Code Builder.

**Where:** This change applies to Service Cloud in Lightning Experience in Enterprise and Unlimited editions for an additional cost.

**Who:** To use the Einstein Studio Insight, you need the Service Intelligence User permission set. To manage the Einstein Studio Insight, you need the Service Intelligence Admin permission set.

**How:** Use Lightning App Builder to drag the component to a case or custom Lightning page.



SEE ALSO:

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

## Apply Additional Service Assets in Data Cloud

Bring more of your service data into Service Cloud with Service Data Kit version 3.0. This updated version includes Knowledge, Service Catalog, Incident Management, and Field Service data bundles with easy installation of knowledge, service catalog, entitlement, and incident assets. These data assets power Service Intelligence, a data-driven solution that shows key contact center performance metrics. You can also use the Service data kit outside of Service Intelligence to ingest service-related data to Data Cloud and build your own applications.

**Where:** This change applies to Service Cloud in Lightning Experience in Enterprise and Unlimited editions for an additional cost.

**How:** If you have the Service data kit installed, upgrade or reinstall it to ensure that it's up to date. You can retrieve data assets for knowledge, service catalog, entitlements, and incidents only when those features are turned on. Upgrading the data kit is necessary to access the latest enhancements to Service data model objects (DMOs).

### SEE ALSO:

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

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

[Salesforce Help: Install the Service Data Kit for Service Intelligence \(can be outdated or unavailable during release preview\)](#)

[Knowledge Article: Requirements to Create CRM Data Streams from Service Cloud Data Bundle \(can be outdated or unavailable during release preview\)](#)

## Channels

Create enhanced SMS and Partner Messaging channels, wrap up calls and enhanced messaging sessions faster with Einstein Work Summaries, and more.

### Email

Service Email updates include improvements to Email-to-Case, an upgraded composer experience, and enhanced API accessibility.

### Messaging

Connect an external messaging service to Salesforce with Partner Messaging, set up enhanced SMS channels, and explore other improvements to Messaging.

### Voice

Get streamlined support and simplify the agent workflow.

### Social Media

Social Customer Service Starter Pack is retiring.

### Chat

Chat is in maintenance-only mode, and some users can't set up new channels.

### Channel Tools

A new landing page in Channel-Object Linking setup introduces Individual-Object Linking.

## Email

Service Email updates include improvements to Email-to-Case, an upgraded composer experience, and enhanced API accessibility.

### [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 secure token in the email subject or body. If no match is found, Email-to-Case checks metadata from the email headers. This update is scheduled for enforcement in Spring '25.

### [Improvements to Email-to-Case](#)

Say more with the increased default character limit for body fields, customize your experience with threading preferences, and easily route messages to the right teams.

### [Transition to the Lightning Editor for Email Composers in Email-to-Case \(Generally Available\) \(Release Update\)](#)

When enabled, this release update replaces the email editor in the docked and case feed email composers. The new email editor is generally available in Lightning Experience in Spring '24.

## 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 secure token in the email subject or body. If no match is found, Email-to-Case checks metadata from the email headers. This update is scheduled for enforcement in Spring '25.

**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 this string 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.

When you enable Lightning threading, emails continue to thread to cases using email headers. If you disable the update and move back to Ref ID, emails don't always thread to previously created cases, resulting in new cases being generated. 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.

SEE ALSO:

[Knowledge Article: Disable Ref ID and Switch to Lightning Threading Release Updates](#)

## Improvements to Email-to-Case

Say more with the increased default character limit for body fields, customize your experience with threading preferences, and easily route messages to the right teams.

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

**Why:** Here's what changed.

- The default character limit for email body fields went from 32,000 to 131,072, so you don't need to increase your org's limit through a support case.
- If your org uses Lightning threading, you can now choose how emails are threaded if no match is found using tokens. This change means you have more flexibility to choose from tokens, metadata from headers, or both.



- We enabled EmailMessage in User Interface API.
- We added an EmailRoutingAddress field to the Email Message object. This change makes it easier to connect each inbound email with the team it's meant for, even when the team's email address is hidden within a distribution list or placed in BCC. The EmailRoutingAddress object is exposed in sObject API.

**How:** To set your threading preferences, go to the Email-to-Case page in Setup.

SEE ALSO:

[Knowledge Article: Disable Ref ID and Switch to Lightning Threading](#)

[Developer Documentation: EmailMessage](#)

## Transition to the Lightning Editor for Email Composers in Email-to-Case (Generally Available) (Release Update)

When enabled, this release update replaces the email editor in the docked and case feed email composers. The new email editor is generally available in Lightning Experience in Spring '24.

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

**When:** Salesforce enforces this update in Winter '25. 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 replacing the email editor in the docked and case feed email composers and switching to a modern editor based in HTML 5. The new editor provides similar functionality in Lightning Experience. New features include:

- Full-screen mode
- Printing
- Undo and Redo buttons
- Format painting
- Emoji picker
- Resizability
- A more responsive toolbar
- Smart copy-paste functionality

Large recipient lists are no problem now that you can drag—or copy and paste—recipients' email addresses, attachments, and inline images.

The embed media action was removed because most email clients don't allow iframed content.

**How:** This update is available to Salesforce orgs with Email-to-Case enabled. If your org was created in Winter '24 or later, you see the new editor by default. If your org was created before Winter '24, you can enable it on the Release Updates page in Setup. After the release update is enabled, users see similar functionality when they compose and edit emails. For some plugins and complex features such as tables, limitations apply. To revert to the previous editor, disable the release update.

SEE ALSO:

[Release Updates](#)

## Messaging

Connect an external messaging service to Salesforce with Partner Messaging, set up enhanced SMS channels, and explore other improvements to Messaging.

### [Get Started with Enhanced Messaging for SMS \(Generally Available\)](#)

Deliver rich, contextually relevant experiences to your customers and service agents with an enhanced long code or short code SMS channel. Transfer or inactivate messaging sessions, work faster with the Enhanced Conversation page component, and more.

### [Say Goodbye to Standard WhatsApp Channels](#)

Enhanced Messaging: It's where the action is! To avoid service interruptions, upgrade your standard WhatsApp channels to enhanced channels by July 30, 2025. As of July 1, 2024, you also can't create additional standard WhatsApp channels.

### [Accept Larger Files in Apple Messages for Business](#)

End users can now send 100 MB files to your business in Apple Messages for Business channels. Previously, outbound files could be up to 100 MB, but inbound files couldn't exceed 25 MB.

### [Close Out Enhanced Messaging Sessions Faster Using Einstein Work Summaries](#)

Save agents time with high quality, AI-generated summaries of enhanced messaging sessions. For each conversation, Einstein generates three outputs: the summary, the issue, and the resolution. This feature is available for English only.

### [Populate Pre-Chat Form Fields by Using an API](#)

When logged-in customers start a messaging conversation that has a pre-chat form, agents already know basic information like their name and email address. With Pre-Chat API, you can populate these pre-chat form fields with the known information.

### [Provide Service and Marketing Together with Unified Messaging for WhatsApp](#)

Provide context to agents and continuity to customers with Unified Messaging, where service and marketing interactions occur in a single channel. Previously, you needed separate WhatsApp Business accounts for marketing and service in Salesforce: one linked to a Marketing Cloud Engagement channel, and another linked to a Service Cloud Digital Engagement WhatsApp channel.

### [Keep Your Agents' Identities Hidden](#)

Protect your agents by hiding their real names in messaging transcripts with the new Agent Alias feature.

### [Extend Customization of the Enhanced Conversation Component](#)

In Winter '24, we introduced customization options for the Enhanced Conversation component. Now you can hide even more components and actions and choose how many minutes can pass until agents are nudged to respond.

### [Message Customers in Right-to-Left Languages](#)

In Winter '24, we announced support for right-to-left languages in the end-user messaging experience of Messaging for In-App and Web. Now agents in enhanced Messaging channels and Messaging for In-App and Web can also read and write messages in right-to-left languages.

### [Improvements to Messaging](#)

Find the chat menu on the left side of the end-user's conversation window in Messaging for In-App and Web; use the Card Carousel format on questions with options in Messaging for In-App and Web, and say goodbye to the Messaging Components page component.

### [Auto-End Enhanced Messaging Sessions After No Response](#)

If an agent initiates a messaging session in an enhanced Messaging channel or Messaging for In-App and Web, the session status automatically switches to Ended after approximately 48 hours of no response from the customer. Previously, these sessions remained in the New status.

### [Try Partner Messaging \(Beta\)](#)

Connect your preferred messaging service to Salesforce with Partner Messaging. Use the features you love from your external messaging service while maintaining a consistent agent and supervisor experience within Salesforce.

### [Provide Double Opt-In Support in Enhanced Messaging](#)

Change the required consent level of an enhanced Messaging channel so that customers must confirm twice that they want to receive messages from you. Changing a channels' consent type to Double Opt-In helps ensure that you're sending messages only to customers who want to receive them.

### [Speed Through Messaging Sessions with the Omni-Channel Sidebar](#)

Keep up with all your work while handling messages. The new sidebar view optimizes screen real estate and lets you see your inbox and notifications while you work.

### [Preview Your Messaging for Web Branding and Configurations](#)

After editing your Messaging for Web deployment, simulate a conversation with an end user to see their experience.

### [Optimize Messaging for In-App and Web with a New Trailhead Badge](#)

Learn about user verification, custom pre-chat fields, conditional availability of the chat button, messaging components, and tools that improve the agent experience. Earn a badge reviewing these options in the new Optimize Messaging for In-App and Web Trailhead badge.

### [Customize Your Messaging Conversation Window Header with Lightning Web Components](#)

To change the look and feel of your messaging conversation window header without writing an entire messaging application from scratch, use Lightning Web Components.

### [Save a Transcript of Your Messaging for Web Conversation](#)

Unverified and verified end users can download a PDF conversation transcript after the Messaging for Web session ends. While Messaging for In-App and Web shows messaging history in the conversation window to verified end users, unverified end users want to review messaging history.

## Get Started with Enhanced Messaging for SMS (Generally Available)


Deliver rich, contextually relevant experiences to your customers and service agents with an enhanced long code or short code SMS channel. Transfer or inactivate messaging sessions, work faster with the Enhanced Conversation page component, and more.

**Where:** This change applies to enhanced SMS channels. [View required editions.](#)

**Why:** In enhanced SMS channels, agents can:

- Transfer a messaging session to another agent, queue, or routing flow.
- Insert quick text, emoji, and files using the messaging actions in the Enhanced Conversation component.
- Send messaging components in plain text format.
- Raise a flag to request help from a supervisor during an active messaging session and receive whispered guidance from the supervisor.
- Mark messaging sessions inactive if the customer stops responding.

**How:** To create an enhanced SMS channel, click **New Channel** on the Messaging Settings page in Setup. Select **SMS**, and then select **Enhanced**. Then, follow the instructions on the screen to open a case with Salesforce Customer Support requesting your enhanced channel. Opening a case is a required step in creating an enhanced SMS channel.

 **Important:** If a number is in use in a standard SMS channel, it's not possible to move that number to an enhanced SMS channel. And if a number is in use in a standard or enhanced channel in a sandbox, it's not possible to move that number to an enhanced SMS channel in production.

SEE ALSO:

[Salesforce Help: Compare Standard and Enhanced SMS Channel Capabilities \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Create SMS Long Code Channels in Service Cloud \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Create SMS Short Code Channels in Service Cloud \(can be outdated or unavailable during release preview\)](#)

## Say Goodbye to Standard WhatsApp Channels

Enhanced Messaging: It's where the action is! To avoid service interruptions, upgrade your standard WhatsApp channels to enhanced channels by July 30, 2025. As of July 1, 2024, you also can't create additional standard WhatsApp channels.

**Where:** This change applies to standard WhatsApp channels. [View required editions.](#)

**Why:** If a standard WhatsApp channel isn't upgraded to an enhanced channel by July 30, 2025, you can no longer send or receive messages in the channel. Because this change is due to changes in the WhatsApp API, Salesforce can't provide extensions to this deadline.

**How:** Here are the high-level steps for upgrading a standard WhatsApp channel.

- First, create an enhanced channel on the Messaging Settings page in Setup. During this process, create another WhatsApp Business account (WABA) and business profile and select the phone number that you're transferring.
- Next, complete the steps in our channel activation checklist.
- Then activate your enhanced channel in Setup.

SEE ALSO:

[Salesforce Help: Considerations for Migrating or Upgrading to Enhanced WhatsApp](#)

[Salesforce Help: Create an Enhanced WhatsApp Channel in Service Cloud](#)

[Salesforce Help: Enhanced WhatsApp Messaging Channel Activation Checklist](#)

## Accept Larger Files in Apple Messages for Business

End users can now send 100 MB files to your business in Apple Messages for Business channels. Previously, outbound files could be up to 100 MB, but inbound files couldn't exceed 25 MB.

**Where:** This change applies to enhanced Apple Messages for Business channels. [View required editions.](#)

## Close Out Enhanced Messaging Sessions Faster Using Einstein Work Summaries

Save agents time with high quality, AI-generated summaries of enhanced messaging sessions. For each conversation, Einstein generates three outputs: the summary, the issue, and the resolution. This feature is available for English only.

**Where:** Einstein generative AI is available in Enterprise and Unlimited editions with Lightning Experience. Available in Salesforce orgs with:

- Einstein for Service add-on. To purchase the add-on, contact your Salesforce account executive.
- Service Cloud Enhanced Messaging Channels

SEE ALSO:

[Wrap Up Call and Enhanced Messaging Sessions Faster with Einstein Work Summaries](#)

## Populate Pre-Chat Form Fields by Using an API

When logged-in customers start a messaging conversation that has a pre-chat form, agents already know basic information like their name and email address. With Pre-Chat API, you can populate these pre-chat form fields with the known information.

**Where:** This change applies to Messaging for Web channels. [View required editions.](#)

**How:** Use the `setVisiblePrechatFields()` and `unsetVisiblePrechatFields()` methods of the `prechatAPI` from your Messaging for Web client.

SEE ALSO:

[Developer Doc: Populate Pre-Chat Form Fields \(can be outdated or unavailable during release preview\)](#)

## Provide Service and Marketing Together with Unified Messaging for WhatsApp

Provide context to agents and continuity to customers with Unified Messaging, where service and marketing interactions occur in a single channel. Previously, you needed separate WhatsApp Business accounts for marketing and service in Salesforce: one linked to a Marketing Cloud Engagement channel, and another linked to a Service Cloud Digital Engagement WhatsApp channel.

**Where:** This change applies to Enterprise and Unlimited Editions with the Marketing Cloud Engagement and Service Cloud Digital Engagement add-on licenses.

**When:** This feature is available for purchase starting on March 31, 2024.

**Why:** With Unified Messaging, you can provide one-way personalized marketing promotions and two-way customer support in a single channel, with Data Cloud powering every interaction. The structure of a conversation is determined by both Omni-Channel, on the service side, and Journey Builder, on the marketing side. If a customer interaction is service-related, Omni-Channel routes the message to a bot or service agent. If the interaction is marketing-related, Journey Builder determines how it is handled. You can customize the keywords and responses associated with each use case, and choose whether incoming messages are treated as service or marketing interactions by default.

The screenshot displays the Salesforce interface for a WhatsApp conversation. On the left, a customer profile for Lauren Margolis is shown, including her contact information and a 'Marketing Overview' section with details like 'Primary Segment: Rock Climber' and 'Member since: 2016'. The central chat window shows a conversation where Lauren Margolis inquires about hiking boots, and Rahul J provides recommendations and assistance. On the right, a 'Case Wrap-Up' panel is visible, containing fields for Case Number, Subject, Status, and Priority, along with a 'Description' field and a 'Summary' section. Below the chat, there is an 'Agent Replies' section with a pre-written response and a 'Not Helpful' button.

**Important:** Currently, it's not possible to upgrade an existing Service Cloud Messaging channel or Marketing Cloud Engagement channel to a Unified Messaging channel. When you set up a Unified Messaging WhatsApp channel, use a new WhatsApp Business account and number. Unified Messaging is also available for email and SMS, but for marketing interactions only.

**How:** To get started with Unified Messaging, contact your Salesforce account executive. Set up and manage Unified Messaging WhatsApp channels on the Your Numbers page in Setup, under WhatsApp. To learn more, go to Salesforce Help.

SEE ALSO:

[Salesforce Help: Unified Messaging](#)

[Salesforce Help: WhatsApp Unified Messaging Channel Capabilities](#)

[Transfer a WhatsApp Conversation from Marketing Cloud to Service Cloud with Journey Builder](#)

## Keep Your Agents' Identities Hidden

Protect your agents by hiding their real names in messaging transcripts with the new Agent Alias feature.

**Where:** This feature is available in enhanced Messaging channels and Messaging for In-App and Web. [View required editions.](#)

SEE ALSO:

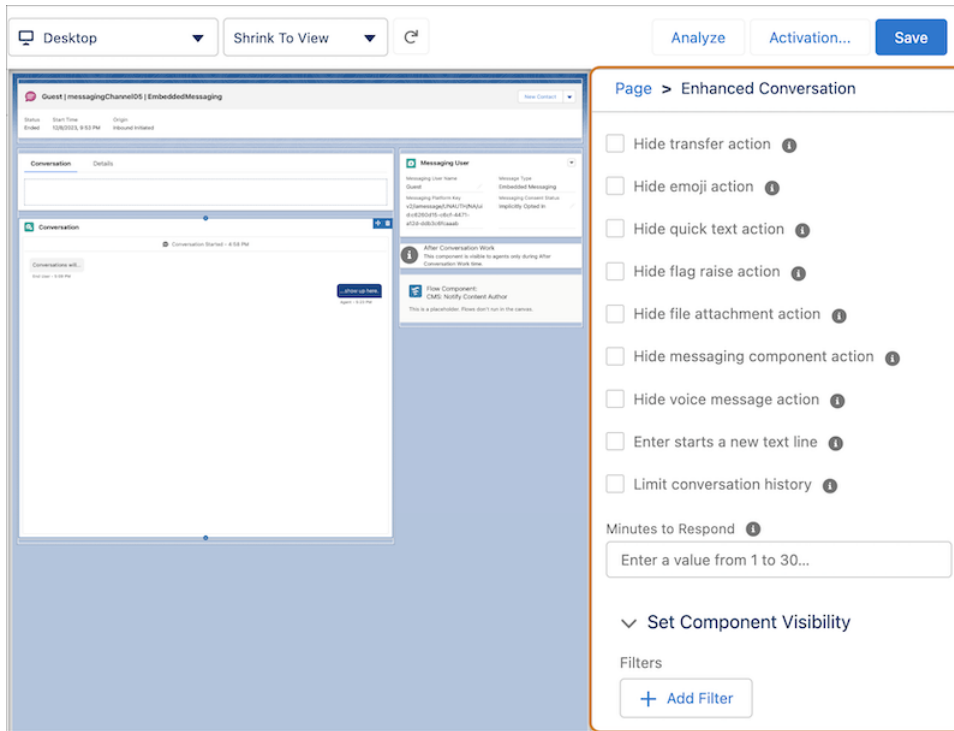
[Protect Your Agents' Identities with Agent Aliases](#)

## Extend Customization of the Enhanced Conversation Component

In Winter '24, we introduced customization options for the Enhanced Conversation component. Now you can hide even more components and actions and choose how many minutes can pass until agents are nudged to respond.

**Where:** This feature is available in Enhanced Messaging Channels and Messaging for In-App and Web. [View required editions.](#)

**How:** From the Lightning App Builder, make your customizations to the Enhanced Conversation component. Then save your changes.



SEE ALSO:

[Salesforce Help: Customize the Enhanced Conversation Component in the Agent Console](#) (can be outdated or unavailable during release preview)

## Message Customers in Right-to-Left Languages

In Winter '24, we announced support for right-to-left languages in the end-user messaging experience of Messaging for In-App and Web. Now agents in enhanced Messaging channels and Messaging for In-App and Web can also read and write messages in right-to-left languages.

**Where:** This change applies to Enhanced Facebook Messenger, Enhanced WhatsApp, Enhanced Apple Messaging for Businesses, Enhanced SMS Messaging, Partner Messaging and Messaging for In-App and Web. [View required editions.](#)

**How:** Enable a right-to-left language in Salesforce.

## Improvements to Messaging

Find the chat menu on the left side of the end-user's conversation window in Messaging for In-App and Web; use the Card Carousel format on questions with options in Messaging for In-App and Web, and say goodbye to the Messaging Components page component.

**Where:** This change applies to enhanced Messaging channels and Messaging for In-App and Web. [View required editions.](#)

**How:** Here's what changed.

- To align with accessibility standards, the chat menu in the end-user's conversation window in Messaging for In-App and Web is now on the left side of the window. Previously, the chat menu was on the right side of the window.
- The Card Carousel format is now supported in Messaging for In-App and Web for questions with static or dynamic options. This format lets end users select from a carousel of images with text.

- The Messaging Components page component is now retired and is automatically removed from any page layouts that contained it. To send messaging components, agents can use the messaging component action in the messaging window.

SEE ALSO:

[Salesforce Help: Messaging Component Types and Formats \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Send Messaging Components in Messaging Sessions \(can be outdated or unavailable during release preview\)](#)

## Auto-End Enhanced Messaging Sessions After No Response

If an agent initiates a messaging session in an enhanced Messaging channel or Messaging for In-App and Web, the session status automatically switches to Ended after approximately 48 hours of no response from the customer. Previously, these sessions remained in the New status.

**Where:** This feature is available in enhanced Messaging channels and Messaging for In-App and Web. [View required editions.](#)

SEE ALSO:

[Salesforce Help: Lifecycle of a Messaging Session \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Ending or Inactivating Messaging Sessions Automatically \(can be outdated or unavailable during release preview\)](#)

## Try Partner Messaging (Beta)

Connect your preferred messaging service to Salesforce with Partner Messaging. Use the features you love from your external messaging service while maintaining a consistent agent and supervisor experience within Salesforce.

**Where:** This feature is available in Enterprise, Unlimited, and Developer editions for Service Cloud or Sales Cloud with the Digital Engagement add-on license.



**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:** Download a managed package from the App Exchange or build your own integration in Workbench. In Setup, go to Messaging Settings, and follow the steps to add the Partner Messaging channel. Set up an Omni-Channel Flow for routing.

SEE ALSO:

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

## Provide Double Opt-In Support in Enhanced Messaging

Change the required consent level of an enhanced Messaging channel so that customers must confirm twice that they want to receive messages from you. Changing a channels' consent type to Double Opt-In helps ensure that you're sending messages only to customers who want to receive them.

**Where:** This change applies to enhanced Messaging channels. [View required editions.](#)

**Why:** Depending on the country where you operate, double opt-in consent can be required in some channels. Here's an example of a double opt-in exchange.

A customer sends you a message.

Business: (Opt-in prompt) *Thanks for connecting with us! To opt into messaging, reply Yes.*

Customer: (Opt-in keyword) *Yes*

Business: (Double opt-in prompt) *To confirm that you want to review messages, reply Start.*



Customer: (Double opt-in keyword) *Start*

Business: (Opt-in confirmation) *Thanks for opting in and allowing us to send you messages.*

Customize these prompts and keywords in your channel settings. You can also set them for multiple languages. Your double opt-in keywords must differ from your opt-in keywords.

**How:** To customize the consent settings for an enhanced Messaging channel, go to the Messaging Settings page in Setup and click your channel's name. Then:

- Set your channel's required consent level in the Consent Type field.
- Write an opt-in prompt.
- Set keywords that customers use to opt into receiving messages, opt out of receiving messages, ask for help, or make a custom request.
- Write the auto-responses that customers receive when they send keywords. The keyword must be the only content of the message for it to trigger an auto-response.
- Set keywords and responses for languages other than your default language. A keyword can be used only once across the languages that you add.

SEE ALSO:

[Salesforce Help: Customize the Messaging Opt-In and Opt-Out Experience \(can be outdated or unavailable during release preview\)](#)

## Speed Through Messaging Sessions with the Omni-Channel Sidebar

Keep up with all your work while handling messages. The new sidebar view optimizes screen real estate and lets you see your inbox and notifications while you work.

**Where:** This feature is available in Enhanced Messaging Channels and Messaging for In-App and Web. [View Required Editions](#)

SEE ALSO:

[Get the Most out of Omni-Channel with the Sidebar Layout](#)

## Preview Your Messaging for Web Branding and Configurations

After editing your Messaging for Web deployment, simulate a conversation with an end user to see their experience.

**Where:** This feature applies to Messaging for Web channels. [View required editions.](#)

**How:** On your deployment's edit page, click **Test Messaging**.

SEE ALSO:

[Salesforce Help: Preview Your Messaging for Web Setup](#)

## Optimize Messaging for In-App and Web with a New Trailhead Badge

Learn about user verification, custom pre-chat fields, conditional availability of the chat button, messaging components, and tools that improve the agent experience. Earn a badge reviewing these options in the new Optimize Messaging for In-App and Web Trailhead badge.

**When:** This Trailhead badge is available as of January 16, 2024.

**How:** Visit the [Trailhead site](#) to earn your badge.

## Customize Your Messaging Conversation Window Header with Lightning Web Components

To change the look and feel of your messaging conversation window header without writing an entire messaging application from scratch, use Lightning Web Components.

**Where:** This change applies to Messaging for Web channels. View required editions. [View required editions.](#)

**How:** Create a Lightning web component. In the Embedded Service Deployment Settings page for your deployment, click **Add Custom UI Components**. Select the Lightning web component from the Custom Component dropdown menu. Save your changes, and republish your deployment.

SEE ALSO:

[Developer Doc: Customize the Messaging Conversation Window Header \(can be outdated or unavailable during release preview\)](#)

## Save a Transcript of Your Messaging for Web Conversation

Unverified and verified end users can download a PDF conversation transcript after the Messaging for Web session ends. While Messaging for In-App and Web shows messaging history in the conversation window to verified end users, unverified end users want to review messaging history.

**Where:** This feature applies to Messaging for Web channels. [View required editions.](#)

**How:** To turn the feature on, select **Let customers download their conversation transcripts** on the Messaging Settings setup page. End users click the menu in the messaging conversation window and then select **Request Chat Transcript**.

SEE ALSO:

[Salesforce Help: Allow End-Users to Download a Transcript of a Messaging Session](#)

## Voice

Get streamlined support and simplify the agent workflow.

### [Wrap Up Call and Enhanced Messaging Sessions Faster with Einstein Work Summaries](#)

Save agents time with high-quality, AI-generated summaries of voice calls and enhanced messaging sessions. For each conversation, Einstein generates three outputs: the summary, the issue, and the resolution.

### [Enable Single Sign-On with Your Own Identity Provider](#)

Use your choice of a third-party identity provider solution for agents to log in to Voice from the Omni-Channel widget. For example, if your Salesforce org uses Microsoft Azure as an identity provider, you can configure your contact center to require agents to log in and out of the Azure single sign-on page from Omni-Channel.

### [Get Streamlined Support for Service Cloud Voice with Amazon Connect](#)

Salesforce now offers simplified customer support for Service Cloud Voice with Amazon Connect. For questions regarding Amazon Connect or Service Cloud Voice, contact Salesforce Customer Support, the one-stop shop for your service needs. When needed, to resolve customer support inquiries on the customer's behalf, Salesforce works and shares information with AWS Support.

### [Choose a Device for Omni-Channel Notification Sounds](#)

Let agents choose their preferred device for receiving notification sounds from Omni-Channel so they don't miss work items routed to them. For example, on the Omni-Channel widget, agents can choose to hear notifications on their headphones or laptop speakers. This feature isn't available in Apple's Safari browser.

### [Set Voice Calls as Interruptible Work to Let Agents Handle the Most Important Tasks](#)

Let supervisors set voice calls as interruptible so that Omni-Channel can route more urgent work from other channels to agents immediately. For example, use an object for emergency situations that takes priority over voice calls. Automatically assign emergency work items to agents even when they're on calls. Omni-Channel looks at a work item's size and interruptibility and then searches for agents whose available capacities suit that work item.

### [Recover Transcripts After Service Downtime and Errors](#)

With this enhancement, Service Cloud Voice can generate a real-time transcript if a configuration or InvokeTelephonyIntegration Lambda function issue occurs during an inbound call. Previously, it couldn't generate the transcript. Also, if real-time transcription doesn't work because of other issues, like Service Cloud Voice being down, you can invoke the Upload or Update Connect REST API to manually backfill missing transcripts after the call ends.

### [Set Up Agents Quickly with Auto-Created Quick Connects](#)

When you add users to a contact center that uses Amazon Connect telephony, you no longer manually create the quick connects in Amazon. Instead, let Salesforce create them for you. Amazon quick connects let agents quickly dial other agents or view their availability statuses when they transfer calls.

### [Take Advantage of Additional Einstein Conversation Insights Support for Amazon Connect](#)

Einstein Conversation Insights can now analyze call recordings from Service Cloud Voice with Partner Telephony from Amazon Connect. Previously, Einstein Conversation Insights could analyze recordings from Service Cloud Voice with Amazon Connect and Service Cloud Voice with Partner Telephony.

### [Pass the Conversation Intelligence Rule Name as Input to a Flow \(Release Update\)](#)

This release update adds a new ruleDevName flow input parameter that's sent to Recommendation Strategy and autolaunched flows linked to the Conversation Intelligence rule. The input parameter contains the developer name of the rule.

### [Check More Critical Settings with the Voice Status Utility](#)

In addition to helping agents check whether their browser, microphone, presence status, and Amazon Connect connection are ready for voice calls, this utility now checks if an agent's workspace is enabled with virtual desktop infrastructure (VDI) and a third-party identity provider (IdP). These settings help admins and agents troubleshoot their Voice setup to get online faster.

### [Get the Latest Enhancements for Your Amazon Connect Contact](#)

Take advantage of the Service Cloud Voice enhancements and bug fixes for your Amazon Connect contact center. Spring '24 includes Contact Center version 14.0. To test the updates before they go live in production, deploy them to your sandbox.

### [Prepare for Google Chrome's Phasing Out of Third-Party Cookies](#)

Google is beginning a gradual rollout of its Privacy Sandbox initiative, which can impact Salesforce users on Service Cloud Voice with Amazon Connect and Service Cloud Voice with Partner Telephony from Amazon Connect. If your users work with the Chrome browser, prepare them for any disruptions and review your options.

## Wrap Up Call and Enhanced Messaging Sessions Faster with Einstein Work Summaries

Save agents time with high-quality, AI-generated summaries of voice calls and enhanced messaging sessions. For each conversation, Einstein generates three outputs: the summary, the issue, and the resolution.

**Where:** Einstein generative AI is available in Unlimited editions with Lightning Experience. Available in Salesforce orgs with:

- Einstein for Service add-on license. To purchase the add-on, contact your Salesforce account executive.
- Service Cloud Enhanced Messaging Channels
- 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 get started, enable Work Summaries (1), map the generated output to fields in a Salesforce object (2), and then activate summaries for the service channel (3).

The screenshot shows the Salesforce Setup page for Einstein Work Summaries. The left sidebar contains a navigation menu with categories like 'Feature Settings', 'Service', 'Einstein Work Summaries', 'Einstein', 'Einstein Generative AI', and 'Einstein Platform'. The main content area is titled 'Einstein Work Summaries' and is divided into three sections:


- Turn On Work Summaries:** This section includes a toggle switch for 'Einstein Work Summaries' which is turned 'On' (marked with a '1').
- Map Responses to Salesforce Fields:** This section includes a toggle switch for 'Voice Call Summaries' which is turned 'Active' (marked with a '3').
- Field Mapping:** This section includes a table for mapping Einstein responses to Salesforce fields (marked with a '2').

Einstein Responses	Target Voice Call Fields
<b>Summary</b> A conversation overview	<b>Voice Call Field Name</b> Voice Summary
<b>Issue</b> The customer contact reason	<b>Voice Call Field Name</b> Voice Resolution
<b>Resolution</b> The customer contact outcome	<b>Voice Call Field Name</b> Voice Issue

To show the summaries to agents, add the Einstein Field Recommendations component to the VoiceCall or Messaging Session record pages.

After the call or messaging session ends, Einstein generates values for the Summary, Issue, and Resolution fields. To generate values during the call or session, agents click **Get Einstein Recommendations** in the Wrap-Up component of the service console. Agents can review, edit, and save the generated summaries.

The screenshot displays the Salesforce Messaging Console interface. On the left, a 'Wrap-Up' sidebar is visible, featuring a 'Get Einstein Recommendations' button highlighted with an orange box. The main area shows a 'Voice Call' record for +14257854029, including call details like 'Call Started' (8/29/2023, 6:54 PM) and 'Call Duration' (00:01:16). Below this is a 'Call Audio Player' for the same call, showing a play button, a progress bar at 00:00/00:56, and volume controls. The bottom section shows a 'Conversation' transcript with two messages from an agent: 'I have a lot of customers to assist.' and 'I don't have time to hold your hand through this.', followed by a customer response: 'Uh, I understand. You may be busy, but thanks. Uh, you just lost a customer.'

 **Note:** Work Summaries for Enhanced Messaging is available in English, French, German, Italian, Japanese, and Spanish. Work Summaries for Voice is available in English only. To get Work Summaries for Voice in French, German, Italian, Japanese, and Spanish, contact your account executive to join the pilot program.

Work Summaries for Voice in these additional languages 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 Salesforce's sole discretion, and Salesforce 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:

[Einstein Features](#)

[Salesforce Help: Einstein for Service: Work Summaries \(can be outdated or unavailable during release preview\)](#)

## Enable Single Sign-On with Your Own Identity Provider

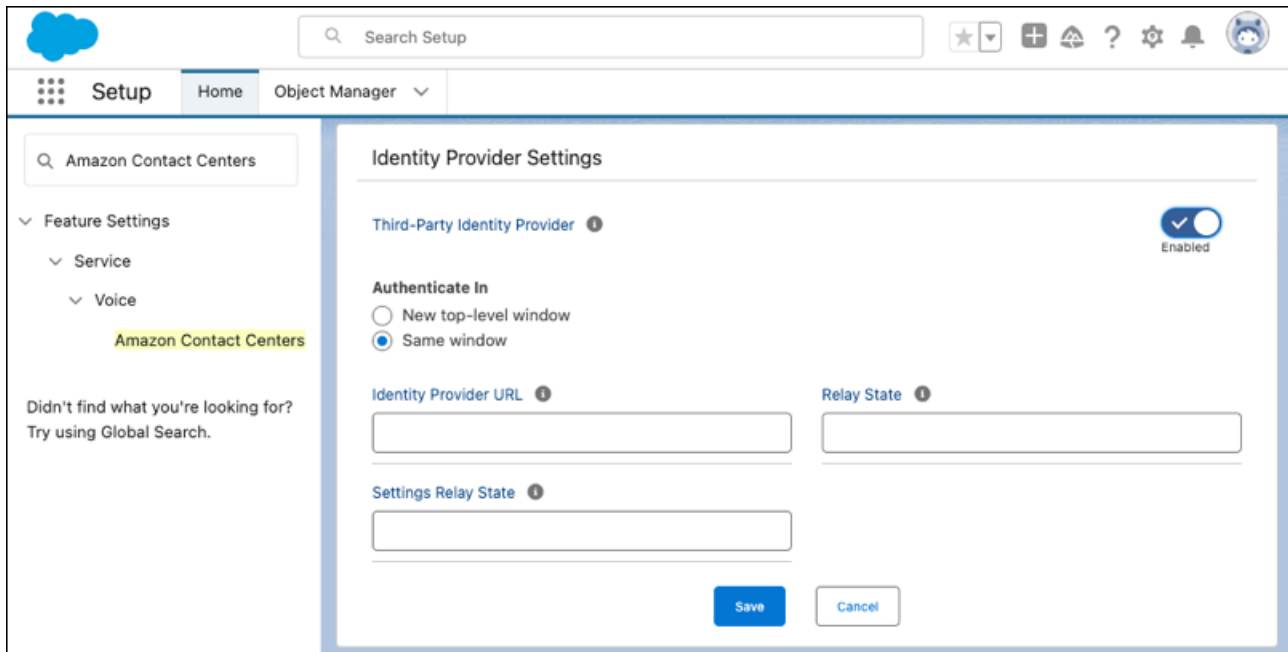
Use your choice of a third-party identity provider solution for agents to log in to Voice from the Omni-Channel widget. For example, if your Salesforce org uses Microsoft Azure as an identity provider, you can configure your contact center to require agents to log in and out of the Azure single sign-on page from Omni-Channel.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions. Available in Salesforce orgs with these [telephony models](#).

- Service Cloud Voice with Amazon Connect
- Service Cloud Voice with Partner Telephony from Amazon Connect

**How:** In the contact center details page, configure your third-party identity provider.

When you click **Telephony Settings** on the contact center details page, the third-party identity provider logs you in to Amazon Connect. When an agent sets themselves as available in the Omni-Channel widget, the identity provider logs them in to Amazon Connect behind the scenes.



Before proceeding to Voice on the Omni-Channel widget, agents log in to a single sign-on window. To log out of Voice, agents click **Log Out of Phone System** from Omni-Channel and are redirected to a log out page on Amazon Connect. When agents are logged out of their phone system, a message appears in Omni-Channel that they must refresh their browser to log in again.

SEE ALSO:

[Salesforce Help: Configure Single Sign-On \(SSO\) with Your Own Identity Provider \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Use the Omni-Channel Widget to Work with Customers \(can be outdated or unavailable during release preview\)](#)

## Get Streamlined Support for Service Cloud Voice with Amazon Connect

Salesforce now offers simplified customer support for Service Cloud Voice with Amazon Connect. For questions regarding Amazon Connect or Service Cloud Voice, contact Salesforce Customer Support, the one-stop shop for your service needs. When needed, to resolve customer support inquiries on the customer's behalf, Salesforce works and shares information with AWS Support.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions. Available in Salesforce orgs with this [telephony model](#).

- Service Cloud Voice with Amazon Connect

All models of Service Cloud Voice are available as an add-on license in Service and Sales Clouds.

SEE ALSO:

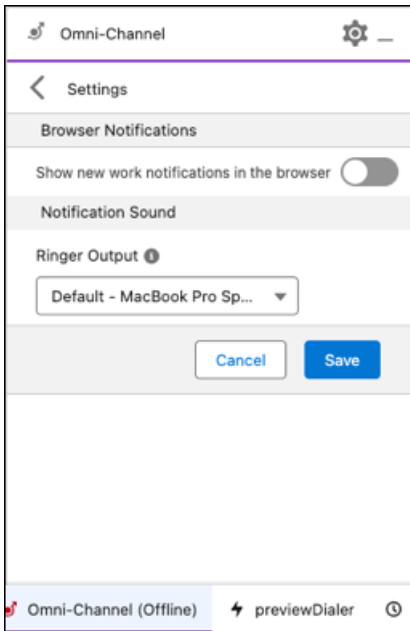
[Salesforce Help: Get Expert Support for Service Cloud Voice \(can be outdated or unavailable during release preview\)](#)

## Choose a Device for Omni-Channel Notification Sounds

Let agents choose their preferred device for receiving notification sounds from Omni-Channel so they don't miss work items routed to them. For example, on the Omni-Channel widget, agents can choose to hear notifications on their headphones or laptop speakers. This feature isn't available in Apple's Safari browser.

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

**How:** Click the Settings icon on the Omni-Channel widget and choose the device under Ringer Output.



You can choose a device after the Omni-Channel widget loads with a valid device ID for the Ringer Output. Otherwise your system device is set as the default ringer. The device you choose is set for your current browser only. For example, if you choose a device for Google Chrome, that device isn't set for Mozilla Firefox.

SEE ALSO:

[Salesforce Help: Service Channel Settings \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Use the Omni-Channel Widget to Work with Customers \(can be outdated or unavailable during release preview\)](#)

## Set Voice Calls as Interruptible Work to Let Agents Handle the Most Important Tasks

Let supervisors set voice calls as interruptible so that Omni-Channel can route more urgent work from other channels to agents immediately. For example, use an object for emergency situations that takes priority over voice calls. Automatically assign emergency work items to agents even when they're on calls. Omni-Channel looks at a work item's size and interruptibility and then searches for agents whose available capacities suit that work item.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions. Available in Salesforce orgs with these [telephony models](#).

- Service Cloud Voice with Amazon Connect
- Service Cloud Voice with Partner Telephony
- Service Cloud Voice with Partner Telephony from Amazon Connect

**How:** Define agent interruptible capacity in the Presence Configuration admin page. Define what work is interruptible in the Service Channel, the Routing Configuration setups, or both.

SEE ALSO:

[Salesforce Help: Configure Work Items as Primary or Interruptible \(can be outdated or unavailable during release preview\)](#)

## Recover Transcripts After Service Downtime and Errors

With this enhancement, Service Cloud Voice can generate a real-time transcript if a configuration or InvokeTelephonyIntegration Lambda function issue occurs during an inbound call. Previously, it couldn't generate the transcript. Also, if real-time transcription doesn't work because of other issues, like Service Cloud Voice being down, you can invoke the Upload or Update Connect REST API to manually backfill missing transcripts after the call ends.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions. Available in Salesforce orgs with these [telephony models](#).

- Service Cloud Voice with Amazon Connect
- Service Cloud Voice with Partner Telephony
- Service Cloud Voice with Partner Telephony from Amazon Connect

SEE ALSO:

[Upload or Update Transcripts with Connect REST API \(can be outdated or unavailable during release preview\)](#)

## Set Up Agents Quickly with Auto-Created Quick Connects

When you add users to a contact center that uses Amazon Connect telephony, you no longer manually create the quick connects in Amazon. Instead, let Salesforce create them for you. Amazon quick connects let agents quickly dial other agents or view their availability statuses when they transfer calls.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions. Available in Salesforce orgs with these [telephony models](#).

- Service Cloud Voice with Amazon Connect
- Service Cloud Voice with Partner Telephony from Amazon Connect

All models of Service Cloud Voice are available as an add-on license in Service and Sales Clouds.

**How:** To automatically create quick connects when you add users to a contact center, select **Create a quick connect for each selected user**.



### Add Contact Center Users

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## Select Users for Your Contact Center

Select at least one user. The list shows all users with Admin or Agent permission sets for Service Cloud Voice.

1 User Selected Maximum 100 Users at a time

+	FULL NAME	EMAIL	PERMISSION SETS
<input checked="" type="checkbox"/>	a20scv a20	atskhovrebov@salesforce.c...	Contact Center Agent

Create a quick connect for each selected user i

## SEE ALSO:

[Salesforce Help: Add and Remove Users To Your Contact Center \(can be outdated or unavailable during release preview\)](#)

## Take Advantage of Additional Einstein Conversation Insights Support for Amazon Connect

Einstein Conversation Insights can now analyze call recordings from Service Cloud Voice with Partner Telephony from Amazon Connect. Previously, Einstein Conversation Insights could analyze recordings from Service Cloud Voice with Amazon Connect and Service Cloud Voice with Partner Telephony.

**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

## SEE ALSO:

[Salesforce Help: Analyze Call Recordings for Insights \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Connect Voice Recording Providers \(can be outdated or unavailable during release preview\)](#)

## Pass the Conversation Intelligence Rule Name as Input to a Flow (Release Update)

This release update adds a new ruleDevName flow input parameter that's sent to Recommendation Strategy and autolaunched flows linked to the Conversation Intelligence rule. The input parameter contains the developer name of the rule.

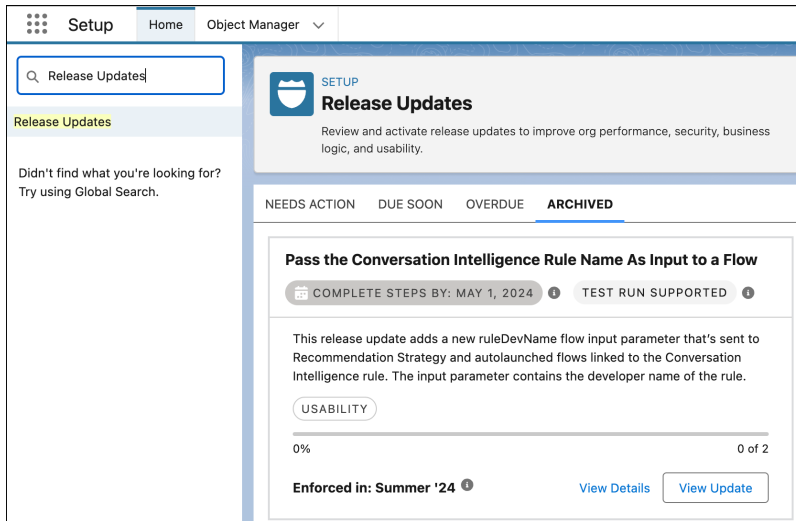
**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions. Available in Salesforce orgs with these [telephony models](#).

- 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.

**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.

**How:** To review this update, from Setup, in the Quick Find box, enter *Release Updates*, and then select **Release Updates**. For Pass the Conversation Intelligence Rule as Input to Flows, follow the testing and activation steps.



Next, create a `ruleDevName` input variable in Flow Builder, and then add the input variable to a Recommendation Strategy or an autolaunched flow.

### New Resource

**\* Resource Type**  
Variable

**\* API Name**  
ruleDevName

Description  
Dev name of the rule.

**\* Data Type**  
Text  Allow multiple values (collection)

Default Value  
Enter value or search resources...

**Availability Outside the Flow**  
 Available for input  
 Available for output

#### SEE ALSO:

[Salesforce Help: Create a Conversation Intelligence Rule to Trigger an Action \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Set Up an Autolaunched Flow \(can be outdated or unavailable during release preview\)](#)

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

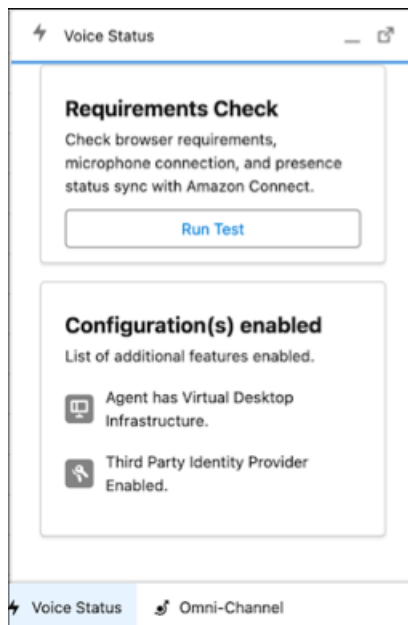
## Check More Critical Settings with the Voice Status Utility

In addition to helping agents check whether their browser, microphone, presence status, and Amazon Connect connection are ready for voice calls, this utility now checks if an agent's workspace is enabled with virtual desktop infrastructure (VDI) and a third-party identity provider (IdP). These settings help admins and agents troubleshoot their Voice setup to get online faster.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions. Available in Salesforce orgs with these [telephony models](#).

- Service Cloud Voice with Amazon Connect
- Service Cloud Voice with Partner Telephony from Amazon Connect

**How:** Run tests from the Voice Status Utility to see what is configured for Voice.



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

## Get the Latest Enhancements for Your Amazon Connect Contact

Take advantage of the Service Cloud Voice enhancements and bug fixes for your Amazon Connect contact center. Spring '24 includes Contact Center version 14.0. To test the updates before they go live in 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 \(can be outdated or unavailable during release preview\)](#)

## Prepare for Google Chrome's Phasing Out of Third-Party Cookies

Google is beginning a gradual rollout of its Privacy Sandbox initiative, which can impact Salesforce users on Service Cloud Voice with Amazon Connect and Service Cloud Voice with Partner Telephony from Amazon Connect. If your users work with the Chrome browser, prepare them for any disruptions and review your options.

**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
- Service Cloud Voice with Partner Telephony from Amazon Connect

**When:** Starting in January 2024, Chrome won't support third-party cookies for 1% of its users worldwide.

**Who:** Google states that most enterprise end users will be excluded from the 1% affected by this change.

SEE ALSO:

[Knowledge Article: Google Chrome's Phasing Out of Third-Party Cookies Potentially Impacts Service Cloud Voice with Amazon Connect and Service Cloud Voice with Partner Telephony from Amazon Connect \(can be outdated or unavailable during release preview\)](#)

[Knowledge Article: Google Chrome's Phasing Out of Third-Party Cookies Potentially Impacts Service Cloud Voice with Partner Telephony \(can be outdated or unavailable during release preview\)](#)

## Social Media

Social Customer Service Starter Pack is retiring.

[Social Customer Service Starter Pack Is Being Retired](#)

Social Customer Service is scheduled for retirement on November 16, 2024.

## Social Customer Service Starter Pack Is Being Retired

Social Customer Service is scheduled for retirement on November 16, 2024.

**Where:** This feature is available in Salesforce Classic and Lightning Experience. This feature is available in all editions with Service Cloud.

SEE ALSO:

[Knowledge Article: Social Customer Service and Social Customer Service Starter Pack Retirement](#)

## Chat

Chat is in maintenance-only mode, and some users can't set up new channels.

### [Chat is No Longer Available to All Eligible Orgs](#)

Admins in net new Salesforce orgs can't enable chat. Admins in entitled orgs that don't yet have chat enabled aren't able to add new chat channels, but they may contact Salesforce Customer Support to turn it back on.

### [Other Improvements to Chat](#)

Learn about additional improvements we've made to Chat.

## Chat is No Longer Available to All Eligible Orgs

Admins in net new Salesforce orgs can't enable chat. Admins in entitled orgs that don't yet have chat enabled aren't able to add new chat channels, but they may contact Salesforce Customer Support to turn it back on.

**Where:** This change applies if you have one of the following.

- Performance or Developer Edition in a Salesforce org that was created after October 31, 2023
- Essentials, Unlimited, or Enterprise Edition with Service Cloud or Sales Cloud

## Other Improvements to Chat

Learn about additional improvements we've made to Chat.

**Where:** This change applies to Embedded Chat on Enterprise, Performance, Unlimited, and Developer Editions with Service Cloud or Sales Cloud.

**Why:** Due to lack of usage and to focus on maintaining newer versions, 2.0 and 2.1 versioned files in Embedded Chat are no longer supported. To the latest, supported 5.0 version, generate a new code snippet from Embedded Service setup.

## Channel Tools

A new landing page in Channel-Object Linking setup introduces Individual-Object Linking.

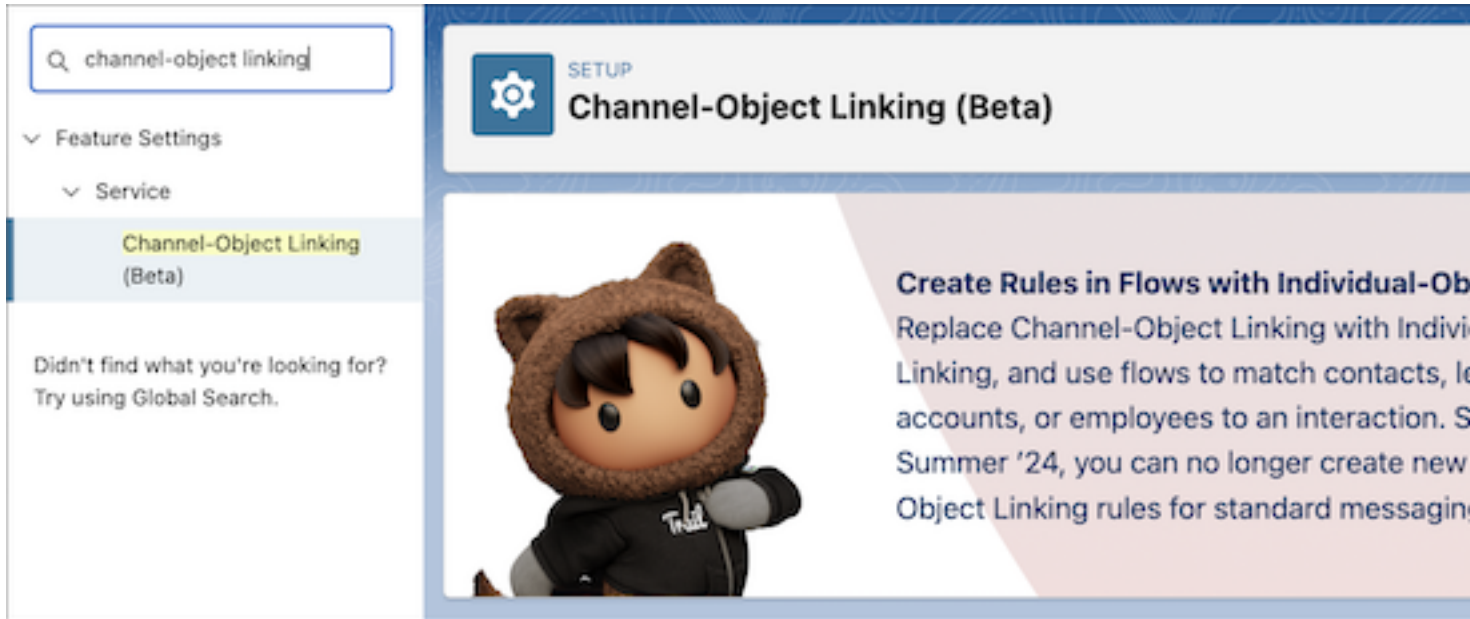
### [Learn More About Individual-Object Linking from a Welcome Banner](#)

A welcome banner in the Channel-Object Linking setup page offers resources to help you start using Individual-Object Linking. This Winter '24 feature reimagines Channel-Object Linking in flows. Automatically search, link, or screen-pop records about the person behind an active conversation with Individual-Object Linking.

## Learn More About Individual-Object Linking from a Welcome Banner

A welcome banner in the Channel-Object Linking setup page offers resources to help you start using Individual-Object Linking. This Winter '24 feature reimagines Channel-Object Linking in flows. Automatically search, link, or screen-pop records about the person behind an active conversation with Individual-Object Linking.

**Where:** This change applies to Enterprise, Performance, Unlimited, and Developer editions with Service Cloud or Sales Cloud.



## Knowledge

Unify all your organizational knowledge within Salesforce for a fully integrated knowledge base and search experience. View and analyze Knowledge article engagement metrics across channels and contexts. Access an expanded list of video formats to enhance the capabilities of your knowledge articles.

### [Turn On Lightning Article Editor and Article Personalization for Knowledge \(Release Update\)](#)

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.

### [Unify Your Organizational Knowledge Across Sources in Salesforce \(Beta\)](#)

Unify all your organizational knowledge from third-party systems like SharePoint, Confluence, Google Drive, and websites within Salesforce. Expose the unified knowledge base across every customer touchpoint and search experience, and ground Generative AI products for Service.

### [Report on Knowledge Engagements Across Channels and Contexts](#)

Measure the effectiveness of your knowledge base and get recommendations on how to increase ROI with the Knowledge Effectiveness dashboard. Across all Service channels and Einstein products, understand how Knowledge is providing value through direct views or Knowledge-grounded generative AI content.

### [Boost the Effectiveness of Your Knowledge Articles with Additional Video Resources](#)

Provide Knowledge authors the ability to embed videos from critical resources not previously allowed by the HTML editor. With the additional authorized video sites, Knowledge authors have access to a wider array of video content to help address customer needs.

## Turn On Lightning Article Editor and Article Personalization for Knowledge (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.

**When:** Salesforce enforces this update in Winter '25. 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 accessible content formatting capabilities and advanced table editing.
- Size the editor to your liking to author articles more effectively and to better understand how articles look to readers.
- Copy and paste content seamlessly from external sources, such as Google Docs or websites, while maintaining the look and feel of the source content.
- Ensure your articles follow W3C accessibility standards using a built-in accessibility checker tool.

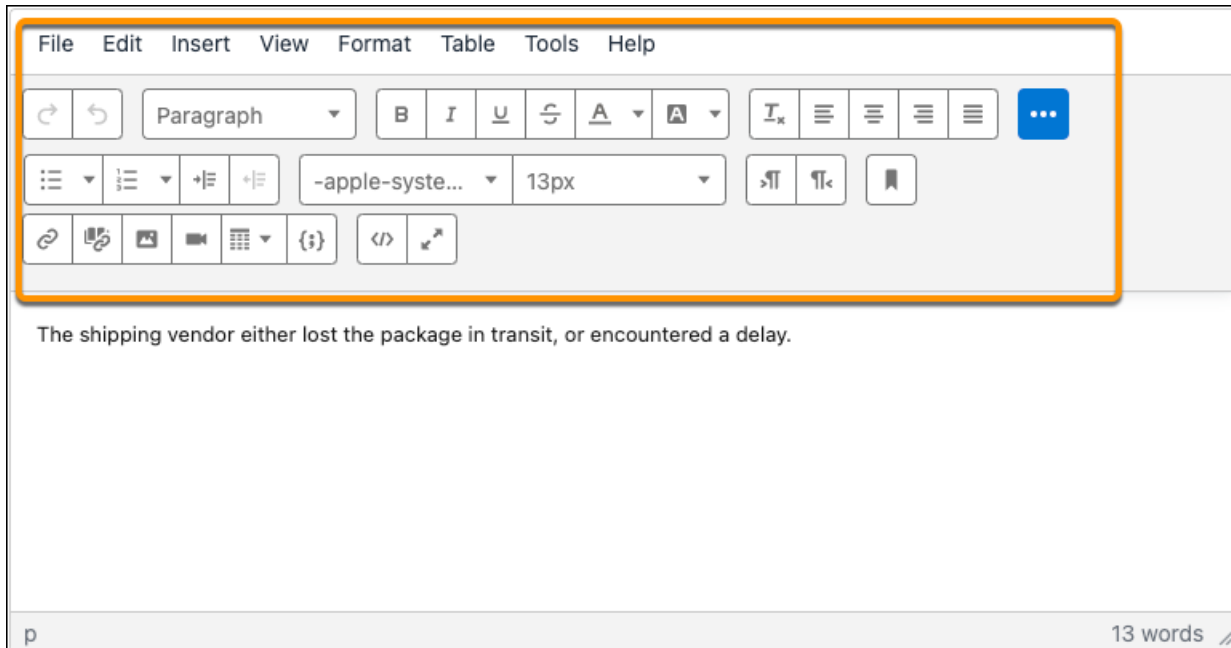
Updates to the editor from beta to general availability include:

- Support multiple languages by localizing labels and allowing authoring in both left-to-right and right-to-left languages.
- Add accordions (collapsible sections) to improve the readability of large articles.
- Use copy code and zoom in and out of code functions in the Source Code editor.
- Add horizontal lines directly from the editor menu.
- See dates and times based on user locales.
- Support for list renumbering.
- Insert quick text.
- Miscellaneous usability improvements.

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. 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.

After you enable the release update, the new Lightning Article Editor replaces the old Knowledge editor.



## SEE ALSO:

[Release Updates](#)

[Salesforce Help: Manage Release Updates](#) (can be outdated or unavailable during release preview)

[Salesforce Help: Lightning Article Editor](#) (can be outdated or unavailable during release preview)

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

[Salesforce Help: Set Up and Use Quick Text](#) (can be outdated or unavailable during release preview)

[Release Updates](#)


[Salesforce Help: Manage Release Updates](#) (can be outdated or unavailable during release preview)

[Salesforce Help: Article Personalization for Knowledge](#) (can be outdated or unavailable during release preview)

## Unify Your Organizational Knowledge Across Sources in Salesforce (Beta)

Unify all your organizational knowledge from third-party systems like SharePoint, Confluence, Google Drive, and websites within Salesforce. Expose the unified knowledge base across every customer touchpoint and search experience, and ground Generative AI products for Service.

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

 **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:** You can enable Unified Knowledge in sandbox orgs starting on February 23, 2024 and production orgs starting on March 8, 2024.

**Why:** For many companies, organizational knowledge is fragmented - scattered across multiple systems and repositories. With fragmented organizational knowledge, service agent efficiency suffers because they're constantly context switching, navigating from one knowledge repository to another. Fragmented organizational knowledge also hampers your ability to surface the right knowledge inside self-service sites. Plus, the quality and accuracy of your generative AI content improves if you're able to ground it in more of your organizational knowledge.



Unified Knowledge eliminates fragmentation issues by:

- Surfacing all your organizational knowledge in a single service platform and capturing new issues from cases.
- Improving self-service by lowering the customer effort to find solutions.
- Connecting and harmonizing all knowledge sources to ground Service GPT apps powered by generative AI.

**How:** From Setup, enter *Unified Knowledge* in the Quick Find box and click **Unified Knowledge**.

SEE ALSO:

[Salesforce Help: Unify Knowledge from Various Sources \(Beta\) \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Set Up Unified Knowledge \(Beta\) \(can be outdated or unavailable during release preview\)](#)

## Report on Knowledge Engagements Across Channels and Contexts

Measure the effectiveness of your knowledge base and get recommendations on how to increase ROI with the Knowledge Effectiveness dashboard. Across all Service channels and Einstein products, understand how Knowledge is providing value through direct views or Knowledge-grounded generative AI content.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions with the Service Intelligence add-on license.

**Who:** To use the Knowledge Effectiveness dashboard, you need the Service Intelligence User permission set. To manage Service Intelligence dashboards, you need the Service Intelligence Admin permission set.

**Why:** With the Knowledge Effectiveness dashboard, you can:

- Analyze article trends based on how often or seldom users engage with articles over time. By understanding how your service agents and customers are interacting with knowledge content over time, you can spot trends and better understand article effectiveness.
- View engagement metrics to quickly assess whether your agents are meeting the compliance and training objectives set by your organization.
- Clarify ROI and cost saving metrics, such as reduced average handling time (AHT) and case deflection, by differentiating who is engaging with an article.

**How:** If you have the Service data kit installed, upgrade or reinstall it to access the Knowledge bundle and the latest enhancements to Service Intelligence. After you upgrade the data kit, Data Cloud starts to capture Knowledge Article Engagement data from that time forward so that you can view engagement insights in your Knowledge dashboard.

SEE ALSO:

[Apply Additional Service Assets in Data Cloud](#)

## Boost the Effectiveness of Your Knowledge Articles with Additional Video Resources

Provide Knowledge authors the ability to embed videos from critical resources not previously allowed by the HTML editor. With the additional authorized video sites, Knowledge authors have access to a wider array of video content to help address customer needs.

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

**How:** From the editor, embed a new video from one of the newly Approved Video Sites. The newly supported videos include:

- akamaized.net
- cloudinary.com
- kaltura.com
- loom.com

- [scribehow.com](https://scribehow.com)
- [sharepoint.com](https://sharepoint.com)

SEE ALSO:

[Salesforce Help: Add Videos with the HTML Editor \(can be outdated or unavailable during release preview\)](#)

## Self-Service

Self-Service provides an online support channel for your customers, allowing them to resolve their inquiries without contacting a customer service representative.

### [Structure Your Help Site with Data Categories \(Generally Available\)](#)

Help your customers discover self-serve solutions with Data Categories in LWR sites, now generally available. Data categories help structure your internal knowledge and catalog items, which help you efficiently classify, discover, and show the most relevant article, question, and idea to your users.

### [Change the Look and Feel of Your Data Categories](#)

Customize how your data categories appear on your LWR site with Data Categories Editor. Edit labels and descriptions associated with your data categories so customers easily grasp your site's construction.

### [Improve the Experience of Your Site Users](#)

SEO-friendly URLs make it easy for site users to understand where they are as they move through the data categories in your site.

### [View Data Subcategories with the Subcategories List Component](#)

Use the Subcategories List component to show LWR site visitors the most relevant child data categories. Let your customers dive deeper into topics by subcategory, such as Home and Auto loans under Finance, so they can immediately get to the best option for addressing their concern.

### [View Layered Data Subcategories](#)

With the Data Category Path component, your site visitors can view the related categories of a knowledge article or the article's related subcategories. Site users can navigate data categories effortlessly, helping them contextualize the information presented on your LWR site and discover how best to use it.

## Structure Your Help Site with Data Categories (Generally Available)

Help your customers discover self-serve solutions with Data Categories in LWR sites, now generally available. Data categories help structure your internal knowledge and catalog items, which help you efficiently classify, discover, and show the most relevant article, question, and idea to your 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: Activate Data Categories on Your LWR Site](#)

## Change the Look and Feel of Your Data Categories

Customize how your data categories appear on your LWR site with Data Categories Editor. Edit labels and descriptions associated with your data categories so customers easily grasp your site's construction.

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

**How:** Edit how data categories appear from Category Management in the Data Categories workspace.

Data Category Label	Label on Site	Description	
Region	Region		
USA	USA		
Canada	Canada		

SEE ALSO:

[Salesforce Help: Manage Data Categories on Your LWR Site](#)

## Improve the Experience of Your Site Users

SEO-friendly URLs make it easy for site users to understand where they are as they move through the data categories in your site.

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

**Why:** Naming and structuring your data categories hierarchically helps orient site users. For example, a data category group with the developer name Insurance and data categories named Home Insurance, Auto Insurance, and Life Insurance has these URLs.

- [Your community site URL]/categories/insurance/home\_insurance
- [Your community site URL]/categories/insurance/auto\_insurance
- [Your community site URL]/categories/insurance/life\_insurance

**How:** When you add data categories to your data category group in Setup, the names entered are the ones that are listed in the URL.

SEE ALSO:

[Salesforce Help: Add Data Categories to Category Groups](#)

## View Data Subcategories with the Subcategories List Component





Use the Subcategories List component to show LWR site visitors the most relevant child data categories. Let your customers dive deeper into topics by subcategory, such as Home and Auto loans under Finance, so they can immediately get to the best option for addressing their concern.

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

**How:** In Experience Builder, add the Subcategories List component to your LWR site. This component is available only on the Network Data Category page, and it shows the subcategories of the current Network Data Category on the page.



Support (4)

-  Data Category Path
-  Knowledge Article List
-  Service Catalog Grid
-  Subcategories List

## View Layered Data Subcategories


With the Data Category Path component, your site visitors can view the related categories of a knowledge article or the article's related subcategories. Site users can navigate data categories effortlessly, helping them contextualize the information presented on your LWR site and discover how best to use it.

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

**How:** In Experience Builder, add the Subcategories List component to your LWR site. Then, add the Data Category Path component to the same page.



Support (4)

-  Data Category Path
-  Knowledge Article List
-  Service Catalog Grid
-  Subcategories List

## Service Catalog

Create fulfillment automations faster, restrict access to catalog items, search for catalog items easily, and navigate your Service Catalog site effortlessly.

### [Create Your Fulfillment Automations Faster with an Improved Fulfillments Builder](#)

Breeze through creating fulfillments with a more intuitive Fulfillments Setup page design. On one page, the new design streamlines the configuration of your flow's input variables into a fulfillment input mapping. Previously, creating fulfillments required multiple clicks within several pages.

### [Enhance Catalog Fulfillments with Autolaunched and Orchestration Flows](#)

Use autolaunched and orchestration flows in your catalog fulfillments to have more configurability and variety of the automation types you use in your catalog. Previously, Service Catalog supported only the use of screen flows in fulfillments.

### [Control Access to Catalog Items with Eligibility Rules](#)

Set access restrictions to catalog items for specific users with eligibility rules using the Catalog Eligibility Setup page. Eligibility rules restrict access to catalog items based on the User object. Previously, eligibility rules were managed only in the Service Catalog Builder and supported only restricting access by group.

### [Enhance Your Service Catalog Management Experience with Item Search](#)

Quickly find and manage catalog items with search on the Service Catalog Management page. For an improved Catalog Management page experience, search for catalog item names in both a table and list views of the catalog. Previously, items were found only by using Alert or Featured filters or by scrolling through the page.

### [Learn How to Use Catalog Eligibility Rules](#)

Use the in-app guidance to learn how to create access restrictions for your catalog items. Previously, you switched to Help for eligibility rules guidance.

### [Navigate Item Hierarchies Efficiently in Your Service Catalog Site](#)

Move between the data category groups and child categories to which a catalog item is assigned in your LWR Service Catalog site. Previously, navigation for item hierarchies wasn't supported.

### [Navigate Between Service Catalog Site Pages Effortlessly](#)

Use the Service Catalog site navigation to efficiently browse the site pages. Previously, site navigation for Service Catalog wasn't available and users could navigate the site only through search.

### [Track Your Catalog Request with the Status Field](#)

We added a Status field to Catalog Requests to facilitate tracking the progression of a catalog request. The three statuses for a catalog request are Request Created, Execution Started, and Execution Completed. Previously, you didn't know the status of a catalog request until the request was resolved.

### [Track Catalog Requests with Catalog Request IDs](#)

Catalog requests are now created and given a SvcCatalogRequestID at the start of a catalog item's run time. The presence of a RequestID lets you reference the RequestID in a case or track the status of incomplete requests. Previously, RequestIDs were created upon completion of a catalog item's run time, meaning it was possible for a RequestID to never be created if a catalog item never completed its run time.

## Create Your Fulfillment Automations Faster with an Improved Fulfillments Builder

Breeze through creating fulfillments with a more intuitive Fulfillments Setup page design. On one page, the new design streamlines the configuration of your flow's input variables into a fulfillment input mapping. Previously, creating fulfillments required multiple clicks within several pages.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions with Service Cloud.

**Who:** To use this feature, you must have the Service Catalog Access permission set license and the Service Catalog Builder permission set.

**Why:** On one page, you have three sections to efficiently configure your fulfillment with point-and-click ease.

- Fulfillment Basics: Provide a name, description, and additional questions to your fulfillments (1).

- Input Variables: Modify your flow input variables to create a fulfillment input mapping that maps to specific objects and their fields (2-4).
- Flow Management: Access and edit the flow used in your fulfillment quickly and easily (5).

**Technician Appointment** 1

Last saved 11/28/2023, 07:36 AM Save

\*Name  
Technician Appointment

\*Description  
Salesforce Sans 12 B I U S L R +F -F = = = I  
Request a site visit from one of our talented technicians to your home or business.

Additional Question ? None

**Input Variables** 2 Edit

Flow Variable Name	Flow Field Type	Fulfillment Field Name	Input Type <span>?</span>	Required
Input_Priority	String	Priority	Picklist	<input type="checkbox"/>
*What type of object has the Picklist? Case		*What field on the selected object has the Picklist? Priority		
Input_Subject	String	Subject	Text	<input type="checkbox"/>

5

Flow  
**Create Case for Contact** Open

Flow Type **Screen Flow**  
Inputs **10**  
Last Modified **Aug 16, 2023**

**How:** Head to Flow Builder to build a flow, and then use the flow to build a fulfillment in the Catalog Fulfillments Setup page.

SEE ALSO:

[Salesforce Help: Catalog Fulfillments](#)

## Enhance Catalog Fulfillments with Autolaunched and Orchestration Flows

Use autolaunched and orchestration flows in your catalog fulfillments to have more configurability and variety of the automation types you use in your catalog. Previously, Service Catalog supported only the use of screen flows in fulfillments.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions with Service Cloud.

**Who:** To use this feature, you must have the Service Catalog Access permission set license and the Service Catalog Builder permission set.

**How:** Head to Flow Builder to build an autolaunched or orchestration flow, and then use the Catalog Fulfillments Setup page to add the flow to your fulfillments.

SEE ALSO:

[Salesforce Help: Catalog Fulfillments](#)

## Control Access to Catalog Items with Eligibility Rules

Set access restrictions to catalog items for specific users with eligibility rules using the Catalog Eligibility Setup page. Eligibility rules restrict access to catalog items based on the User object. Previously, eligibility rules were managed only in the Service Catalog Builder and supported only restricting access by group.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions with Service Cloud.

**Who:**

- To create, manage, and edit eligibility rules, you must have the Service Catalog Access permission set license and the Service Catalog Eligibility Rules Builder custom permission set.
- To create, manage, edit, and assign eligibility rules to catalog items, you must have the Service Catalog Access permission set license, the Service Catalog Builder permission set, and the Service Catalog Eligibility Rules Builder custom permission set.

**Why:** The Catalog Eligibility page provides an intuitive UI to create rules that contain operator and value conditions in addition to AND or OR logical operators.

**How:** Head to the Catalog Eligibility page in Setup, and then create your rules and add them to catalog items.

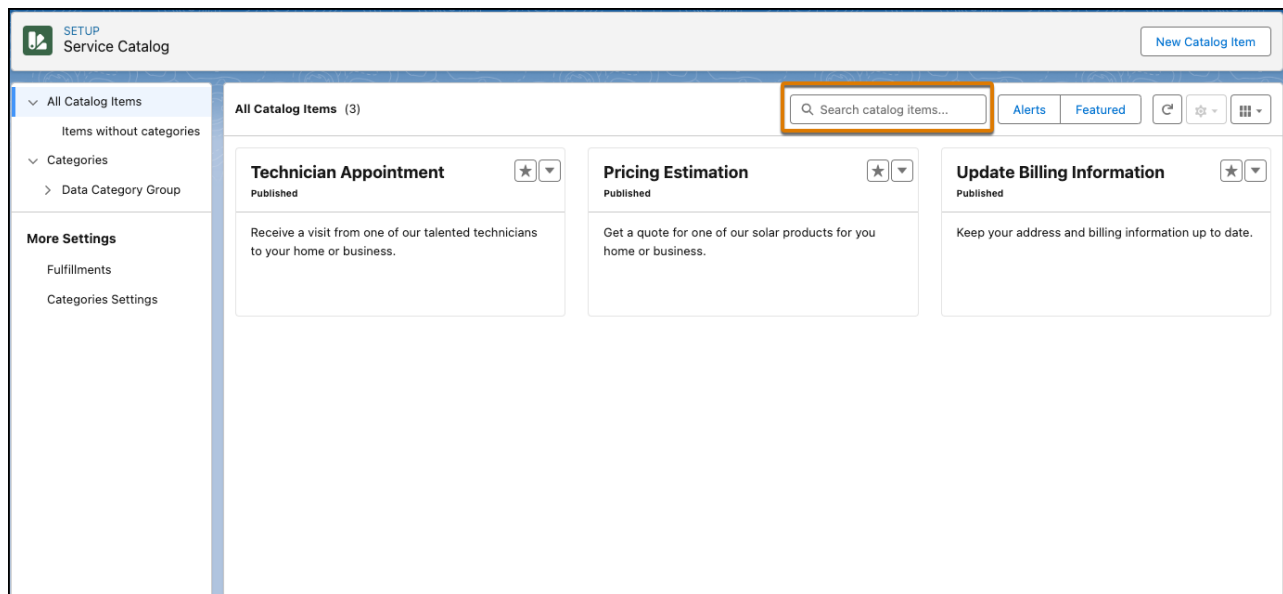
## Enhance Your Service Catalog Management Experience with Item Search

Quickly find and manage catalog items with search on the Service Catalog Management page. For an improved Catalog Management page experience, search for catalog item names in both a table and list views of the catalog. Previously, items were found only by using Alert or Featured filters or by scrolling through the page.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions with Service Cloud.

**Who:** To use this feature, you must have the Service Catalog Access permission set license and the Service Catalog Builder permission set.

**How:** Head to the Catalog Management page in Setup, and then use the search bar.



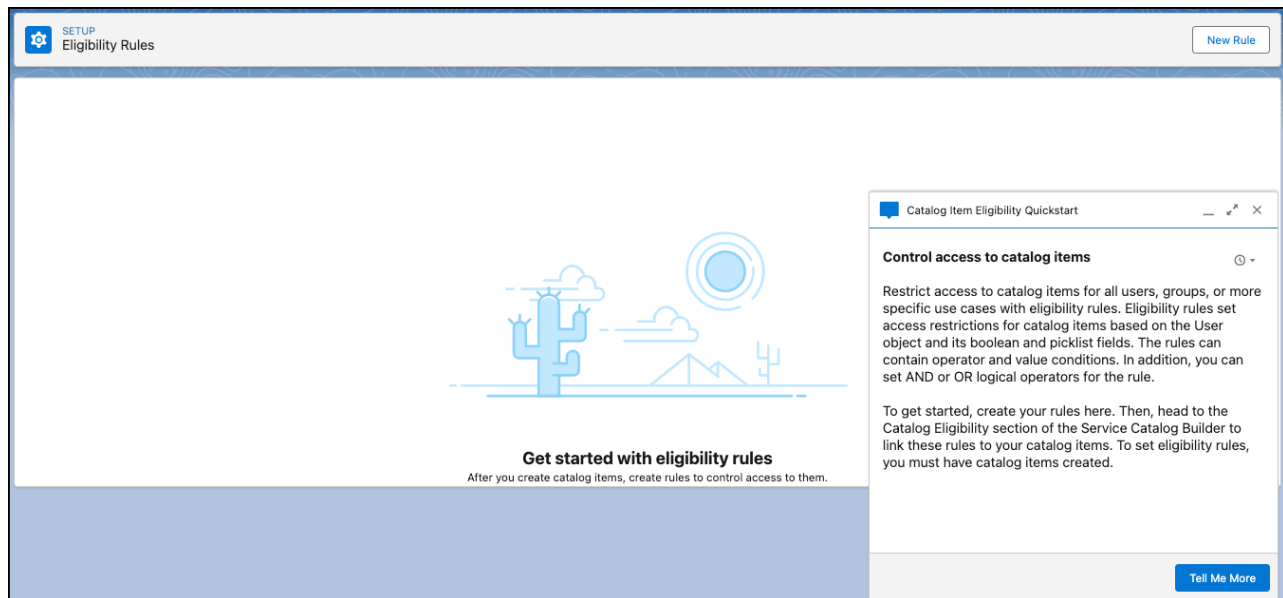
## Learn How to Use Catalog Eligibility Rules

Use the in-app guidance to learn how to create access restrictions for your catalog items. Previously, you switched to Help for eligibility rules guidance.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions with Service Cloud.

**Who:** To use this feature, you must have the Service Catalog Access permission set license and the Service Catalog Builder permission set.

**Why:** Here's how the in-app guidance helps you learn about using eligibility rules.



**How:** Head to the Catalog Eligibility page in Setup, and then review the prompt.

## Navigate Item Hierarchies Efficiently in Your Service Catalog Site

Move between the data category groups and child categories to which a catalog item is assigned in your LWR Service Catalog site. Previously, navigation for item hierarchies wasn't supported.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions with Service Cloud for LWR Service Catalog Sites.

**Who:** To use this feature, you must have the Service Catalog Access permission set license and one of these community licenses.

- Channel Community
- Customer Community
- Customer Community Login
- Customer Community Plus
- Customer Community Plus Login
- External Apps
- Partner Community
- Partner Community Login



**How:** This feature is available automatically in your LWR Service Catalog site with the Data Category Path component that is included on the Service Catalog Item Definition Detail object page.

SEE ALSO:

[Salesforce Help: LWR Setup Pathway](#)

## Navigate Between Service Catalog Site Pages Effortlessly

Use the Service Catalog site navigation to efficiently browse the site pages. Previously, site navigation for Service Catalog wasn't available and users could navigate the site only through search.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions with Service Cloud for LWR Service Catalog sites.

**Who:** To use this feature, you must have the Service Catalog Access permission set license and one of these community licenses.

- Channel Community
- Customer Community
- Customer Community Login
- Customer Community Plus
- Customer Community Plus Login
- External Apps
- Partner Community
- Partner Community Login

**How:** Head to Experience Builder to build the Service Catalog site navigation menu on the Home Page.

SEE ALSO:

[Salesforce Help: LWR Setup Pathway](#)

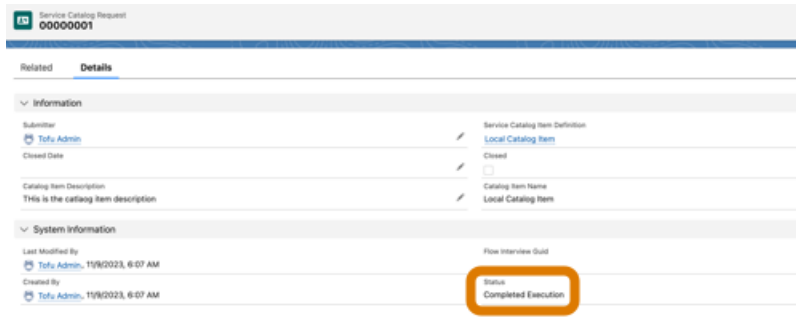
## Track Your Catalog Request with the Status Field

We added a Status field to Catalog Requests to facilitate tracking the progression of a catalog request. The three statuses for a catalog request are Request Created, Execution Started, and Execution Completed. Previously, you didn't know the status of a catalog request until the request was resolved.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions with Service Cloud.

**Who:** To use this feature, you must have the Service Catalog Access permission set license and the Service Catalog Builder permission set.

**How:** Head to a catalog request to see its status.



SEE ALSO:

[Salesforce Help: Catalog Requests](#)

## Track Catalog Requests with Catalog Request IDs

Catalog requests are now created and given a SvcCatalogRequestID at the start of a catalog item's run time. The presence of a RequestID lets you reference the RequestID in a case or track the status of incomplete requests. Previously, RequestIDs were created upon completion of a catalog item's run time, meaning it was possible for a RequestID to never be created if a catalog item never completed its run time.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions with Service Cloud.

**Why:** Salesforce admins could inadvertently create an incomplete catalog request and have no way to track its progression or locate it.

## Routing

Work efficiently and easily with the new Omni-Channel sidebar. Choose which tabs to display in Omni Supervisor and create custom Omni Supervisor tabs. Select multiple queues to monitor simultaneously and see the applied filter on the Supervisor Wallboard. Hide agents' identities in Voice and Messaging transcripts. Use Enhanced Omni-Channel in apps with standard navigation. Use status-based capacity to pause messaging sessions and keep track of the sessions you've paused.

### [Get the Most out of Omni-Channel with the Sidebar Layout](#)

Work more efficiently with the new Omni-Channel sidebar, which provides a layout that optimizes screen real estate. View all your work at once and switch easily between work items. See updates alongside the work you're doing. The sidebar is persistent, embedded in the agent workspace, but collapsible for when you need extra space, so you don't need to open and close the utility bar widget anymore. The sidebar works in apps with either standard or console navigation. Happy with the old utility-bar widget? No problem—it's still there.

### [Swiftly Tailor Omni Supervisor to Your Supervisors' Needs with Configurable Tabs](#)

Is one supervisor using only skills-based routing and doesn't need to see the queue backlog? Does another supervisor not need to see the skills backlog? Want to limit what agents with access to Omni Supervisor can see, with a "Wallboard-only" version of Omni Supervisor? Customize your supervisors' experiences by setting which tabs each supervisor sees, including custom tabs, and in which order.

### [Create Custom Tabs for Omni Supervisor](#)

Are you a direct Salesforce customer? Or an ISV partner, perhaps a Build Your Own (BYO) or Workforce Management (WFM) partner? No matter your role, take full advantage of the power of Omni Supervisor by creating bespoke tabs for supervisors. Embed your own apps or metrics on an Omni Supervisor tab and share your page on the App Exchange, or use the custom tab for your own needs.

### Select Multiple Queues You Want to Monitor on the Omni Supervisor Wallboard

Multi-select queues when following your agents in the Omni Supervisor Wallboard. Each metric on the wallboard shows which queues are selected and presents information for only those queues. If you don't select any queues, then the wallboard shows information for all queues.

### Protect Your Agents' Identities with Agent Aliases

Keep your agents' real names hidden in messaging transcripts by using the new Agent Alias feature to show a custom name. You can create an alias from scratch, like Support Agent, or use a preset merge field such as Name, Nickname, or Alias. Setting an agent alias is optional. If set, it applies to all users in a Presence Configuration.

### Use Enhanced Omni-Channel in Apps with Standard Navigation

Most Sales Cloud users use apps with standard navigation, so Sales Cloud users in particular are going to love this feature—but it's for anyone who uses standard apps. Run Enhanced Omni-Channel in your favorite standard apps, just as you do with console apps. Take advantage of Enhanced Omni-Channel features like paused work, improved notifications, the new sidebar layout, and Enhanced Messaging support while using your standard app.

### Enhanced Omni-Channel Allows More Queued Work Items

The maximum number of objects that can be waiting for routing at once is now 300,000 for orgs with Enhanced Omni-Channel enabled. The 200,000 limit still applies for orgs using Standard Omni-Channel.

### Create Reports for Agent Work with Pre-Configured Report Types

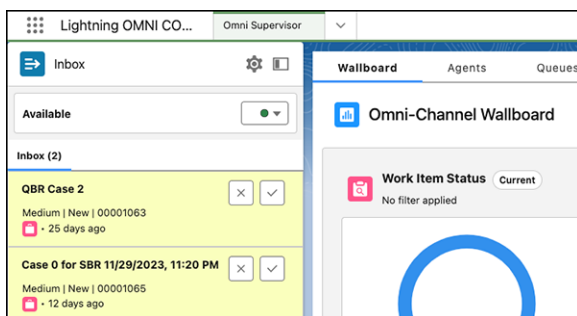
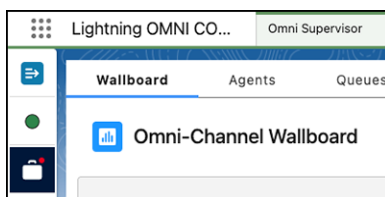
Use out-of-the-box report types to join agent work with the objects most commonly used with Omni-Channel. Make custom reports on such data as workload by case type, active time by channel type, and so on.

### Get Omni-Channel Notification Sounds Through Your Speakers

Hear Omni-Channel notifications through your speakers, even if you've set Voice notifications to come through your headphones. Don't miss a new call when you've removed your headphones.

## Get the Most out of Omni-Channel with the Sidebar Layout

Work more efficiently with the new Omni-Channel sidebar, which provides a layout that optimizes screen real estate. View all your work at once and switch easily between work items. See updates alongside the work you're doing. The sidebar is persistent, embedded in the agent workspace, but collapsible for when you need extra space, so you don't need to open and close the utility bar widget anymore. The sidebar works in apps with either standard or console navigation. Happy with the old utility-bar widget? No problem—it's still there.



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

**How:** From Omni-Channel Settings, click **Enhanced Omni-Channel Routing**. Then, in App Manager, create or edit an app and select **Use Omni-Channel Sidebar** on the App Options page.

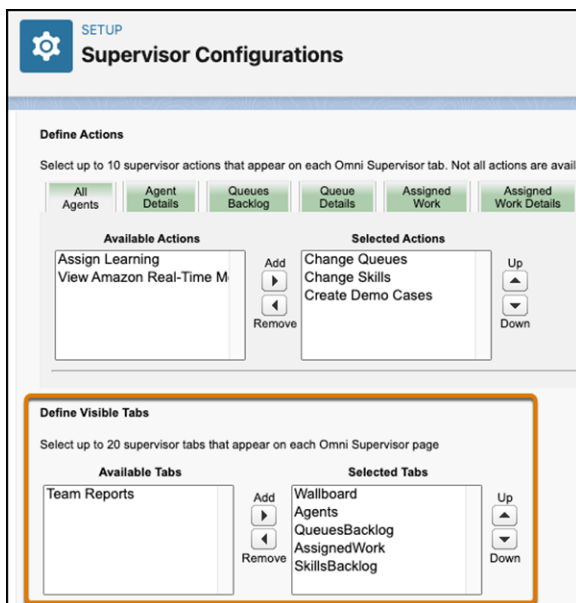
## Swiftly Tailor Omni Supervisor to Your Supervisors' Needs with Configurable Tabs

Is one supervisor using only skills-based routing and doesn't need to see the queue backlog? Does another supervisor not need to see the skills backlog? Want to limit what agents with access to Omni Supervisor can see, with a "Wallboard-only" version of Omni Supervisor? Customize your supervisors' experiences by setting which tabs each supervisor sees, including custom tabs, and in which order.

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

**How:** Enable Enhanced Omni-Channel to use this feature. To set which tabs a supervisor sees in Omni Supervisor, use Define Visible Tabs on a Supervisor Configurations page.

This screenshot shows a user-created custom tab, Team Reports, as available. Add it to Omni Supervisor by moving it to the Selected Tabs list. Change the order that tabs appear in with the up and down arrows.



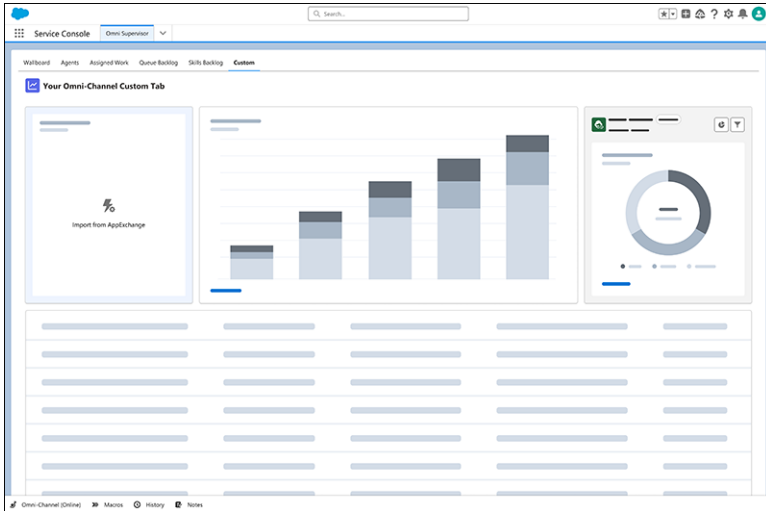
SEE ALSO:

[Create Custom Tabs for Omni Supervisor](#)

[Salesforce Help: Change What Supervisors See in Omni Supervisor \(can be outdated or unavailable during release preview\)](#)

## Create Custom Tabs for Omni Supervisor

Are you a direct Salesforce customer? Or an ISV partner, perhaps a Build Your Own (BYO) or Workforce Management (WFM) partner? No matter your role, take full advantage of the power of Omni Supervisor by creating bespoke tabs for supervisors. Embed your own apps or metrics on an Omni Supervisor tab and share your page on the App Exchange, or use the custom tab for your own needs.



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

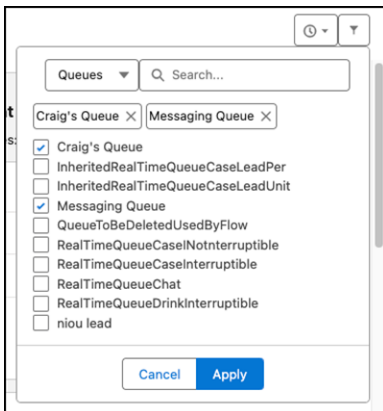
**How:** Enable Enhanced Omni-Channel to use custom tabs. Use Lightning App Builder to create Omni Supervisor pages with the new Omni Supervisor Page Lightning page type. Then assign that new page to a supervisor configuration.

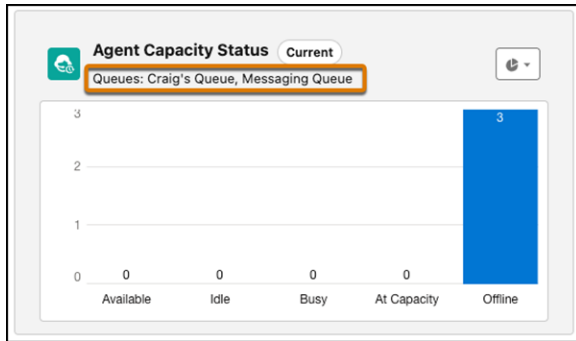
SEE ALSO:

- [Swiftly Tailor Omni Supervisor to Your Supervisors' Needs with Configurable Tabs](#)
- [Salesforce Help: Change What Supervisors See in Omni Supervisor \(can be outdated or unavailable during release preview\)](#)
- [Salesforce Help: Lightning Page Types \(can be outdated or unavailable during release preview\)](#)
- [Salesforce Help: Lightning App Builder \(can be outdated or unavailable during release preview\)](#)

## Select Multiple Queues You Want to Monitor on the Omni Supervisor Wallboard

Multi-select queues when following your agents in the Omni Supervisor Wallboard. Each metric on the wallboard shows which queues are selected and presents information for only those queues. If you don't select any queues, then the wallboard shows information for all queues.





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

**How:** Enable Enhanced Omni-Channel. Only queues that have been selected in a supervisor configuration are available for selection in the Wallboard.

SEE ALSO:

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

## Protect Your Agents' Identities with Agent Aliases

Keep your agents' real names hidden in messaging transcripts by using the new Agent Alias feature to show a custom name. You can create an alias from scratch, like Support Agent, or use a preset merge field such as Name, Nickname, or Alias. Setting an agent alias is optional. If set, it applies to all users in a Presence Configuration.

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

**How:** On a Presence Configurations page, enter an agent alias for all agents in the configuration.


The figure shows the "Agent Settings" form. The "Agent Alias (Enhanced Messaging Only)" field is set to "{!User\_CommunityNickn". Below it, the "Use Merge Field" section is expanded, showing "Field Name" set to "Nickname" and "Merge Field Syntax" set to "{!User\_CommunityNickname)". A note below the syntax field says "Copy the syntax into the Agent Alias field."

SEE ALSO:

[Salesforce Help: Presence Configuration Settings \(can be outdated or unavailable during release preview\)](#)

## Use Enhanced Omni-Channel in Apps with Standard Navigation

Most Sales Cloud users use apps with standard navigation, so Sales Cloud users in particular are going to love this feature—but it's for anyone who uses standard apps. Run Enhanced Omni-Channel in your favorite standard apps, just as you do with console apps. Take advantage of Enhanced Omni-Channel features like paused work, improved notifications, the new sidebar layout, and Enhanced Messaging support while using your standard app.

 **Note:** Only status-based capacity models work with standard apps. Tab-based capacity models don't work in such apps. Service Cloud Voice and Messaging aren't supported with Enhanced Omni-Channel in apps with standard navigation

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

**How:** Enable Enhanced Omni-Channel if it's not already enabled, then create or edit your standard app to use Omni-Channel.

SEE ALSO:

[Get the Most out of Omni-Channel with the Sidebar Layout](#)

[Salesforce Help: Enable Omni-Channel \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: How Are Console Apps Different from Standard Apps? \(can be outdated or unavailable during release preview\)](#)

## Enhanced Omni-Channel Allows More Queued Work Items

The maximum number of objects that can be waiting for routing at once is now 300,000 for orgs with Enhanced Omni-Channel enabled. The 200,000 limit still applies for orgs using Standard Omni-Channel.

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

**How:** Enable Enhanced Omni-Channel to take advantage of this higher limit.

SEE ALSO:

[Salesforce Help: Salesforce Features and Edition Allocations \(can be outdated or unavailable during release preview\)](#)

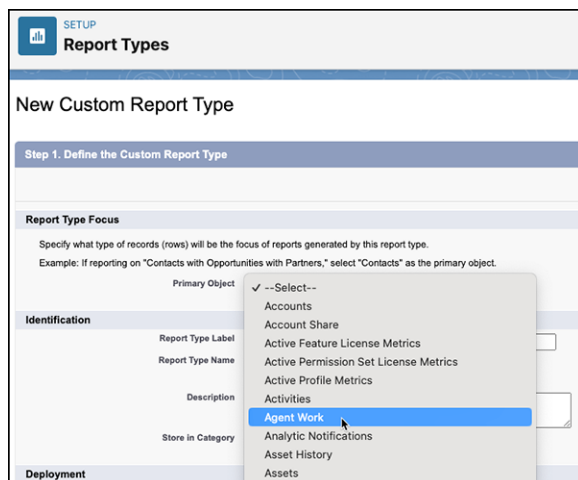
## Create Reports for Agent Work with Pre-Configured Report Types

Use out-of-the-box report types to join agent work with the objects most commonly used with Omni-Channel. Make custom reports on such data as workload by case type, active time by channel type, and so on.

Reports can connect the AgentWork object to these objects:

- Case
- MessagingSession
- Voice
- Lead
- WorkOrder

You can place reports created with these custom report types on Omni Supervisor tabs that you create.



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

SEE ALSO:

[Salesforce Help: Create a Custom Report Type \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Create Custom Tabs for Omni Supervisor \(can be outdated or unavailable during release preview\)](#)

## Get Omni-Channel Notification Sounds Through Your Speakers

Hear Omni-Channel notifications through your speakers, even if you've set Voice notifications to come through your headphones. Don't miss a new call when you've removed your headphones.

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

SEE ALSO:

[Choose a Device for Omni-Channel Notification Sounds](#)

## Einstein for Feedback Management

Create a variety of surveys designed for different goals and audiences, driven by generative AI. Ensure wider audience engagement by translating surveys into multiple languages using generative AI.

[Improve Engagement with AI-Optimized Surveys](#)

Simplify and expedite survey creation with generative AI. Tailor surveys to your audience and customize questions for improved response rates.

[Enhance Survey Reach and Accuracy with Generative AI Translations](#)

Translate surveys automatically into multiple languages, ensuring broader accessibility and participation. Enhance accuracy and efficiency in translated surveys for consistent global reach using generative AI.

SEE ALSO:

[Einstein Features](#)

## Improve Engagement with AI-Optimized Surveys

Simplify and expedite survey creation with generative AI. Tailor surveys to your audience and customize questions for improved response rates.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Feedback Management - Starter or Feedback Management - Growth is enabled. Einstein generative AI is available in Lightning Experience.

**Who:** To create surveys using generative AI, users need the Salesforce Advanced Features Starter user permission or the Salesforce Surveys Advanced Features permission, the Scoring Framework User permission, and the Manage Natural Language Process Results permission. Users also need the AI-Generated Surveys configuration in the Industries AI Setup page.

**Why:** For example, use generative AI to create surveys focused on your customers, partners, and prospects. Questions are designed based on the survey type, number of questions, geographic region and industry of the target audience, and primary target metric.

**How:** To create a survey using generative AI, on the Surveys tab, click **New** and select **Standard Survey** under AI-Generated Surveys, and then click **Continue**.



**Build AI-Generated Survey**

**Simplify survey creation**  
Specify the type of survey that you want to create.

**Basic Details**

Survey Type  
Customer Satisfaction

Number of Questions  
Between 5 and 10

Primary Metric  
Net Promoter Score (NPS)

**Additional Details**

Industry  
Manufacturing

Target Region  
United States

**Build AI-Generated Survey**

**Review and select questions**  
Review the questions to add to the survey builder. You can edit these questions or suggest new ones.

- Create a Customer Satisfaction survey.
- There should be between 5 and 10 questions in the survey.
- Use NPS as the primary metric for the survey.
- Survey is targeted towards Manufacturing Industry.
- Survey is intended for United States customers.

Following questions are generated:

Select All

On a scale of 0-10, how likely are you to recommend our products/services to a friend or colleague?  
Please rate your likelihood of recommending our products/services, with 0 being not at all likely and 10 being extremely likely.

Question Type  
Net Promoter Score (NPS)

How satisfied are you with the quality of our products/services?  
Please rate your satisfaction with the quality of our products/services on a scale of 1-5, with 1 being very dissatisfied and 5 being very satisfied.

Question Type  
Rating

[Create New Questions](#)

[Back](#) [Add to Survey](#)

SEE ALSO:

[Salesforce Help: Create Standard Surveys With Generative AI](#)(can be outdated or unavailable during release preview)  
[Einstein Features](#)

## Enhance Survey Reach and Accuracy with Generative AI Translations

Translate surveys automatically into multiple languages, ensuring broader accessibility and participation. Enhance accuracy and efficiency in translated surveys for consistent global reach using generative AI.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Feedback Management - Starter or Feedback Management - Growth is enabled. Einstein generative AI is available in Lightning Experience.

**Who:** To translate surveys using generative AI, users need the Salesforce Advanced Features Starter user permission or the Salesforce Surveys Advanced Features permission, the Scoring Framework User permission, and the Manage Natural Language Process Results permission. Users also need the Translation AI configuration in the Industries AI Setup page.

**How:** To translate a survey using generative AI, on the Languages tab on the Survey records page, click **Translate** next to the language. Then, click **Translate Page**.

The screenshot displays the Salesforce Net Promoter Score survey interface. At the top, there are tabs for 'Details', 'Related', and 'Languages'. Below the tabs is a table with columns for 'Language' and 'Action'. The table lists various languages: German, Norwegian, Hindi, Swedish, Finnish, Russian, Korean, Portuguese (Brazil), Italian, French, and Spanish. Each language has a 'Translate' button next to it. Below the table, there is a section titled 'Translate Survey: Spanish'. This section contains a warning message: 'This tool uses generative AI, which can produce inaccurate or harmful responses. Check the output for accuracy and safety before using.' Below the warning, there is a text input field for 'Net Promoter Score' with a 'Translate' button. A feedback question 'Was the response helpful?' is also present. At the bottom, there are navigation buttons: 'Previous', 'Translate Page', 'Save', 'Next', and 'Save & Next'.

SEE ALSO:

[Salesforce Help: Translate Surveys With Generative AI](#)(can be outdated or unavailable during release preview)

[Einstein Features](#)

## Simplify Text Data Analysis By Using Natural Language Processing (NLP) Services

Analyze the text-based survey responses based on entities and keyphrases by using Natural Language Processing (NLP) Services. AWS integration offers flexibility in selecting the services like keyphrase and entity extraction. Access results easily in the Natural Language Processing Insights card, which you can drag to any lightning page. Ensure that Amazon Comprehend is enabled in your AWS account.

[Get Easy Access to Natural Language Processing Insights](#)

Get a comprehensive overview of your configured Natural Language Processing services by using the Natural Language Processing Insights card. Drag the Natural Language Processing Insights card to a lightning page to easily access the key phrases and entities identified through AWS services.

[Invocable Action to Initiate Natural Language Processing Services](#)

Use the invocable action, `initiateNaturalLangProcessing`, to create custom flows that initiate Natural Language Processing (NLP) services such as Keyphrase and Entity extraction.

## Get Easy Access to Natural Language Processing Insights

Get a comprehensive overview of your configured Natural Language Processing services by using the Natural Language Processing Insights card. Drag the Natural Language Processing Insights card to a lightning page to easily access the key phrases and entities identified through AWS services.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Feedback Management where NLP Insights is enabled.

**How:** From Setup, in the Quick Find box, enter *Industries AI Setup*, and then select **Industries AI Setup**. Create a use case configuration for Entity extraction and Keyphrase extraction to view the insights in the Natural Language Processing insights card.

## Invocable Action to Initiate Natural Language Processing Services

Use the invocable action, `initiateNaturalLangProcessing`, to create custom flows that initiate Natural Language Processing (NLP) services such as Keyphrase and Entity extraction.

## Work.com

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

See the Work.com release notes for the latest updates: [Work.com Release Notes](#)

## Other Salesforce Products and Services

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

### Customer Success Group

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 Spring '24 include:

- Signature Success Plan:
  - Customer Success Score enhancements
  - Expansion to new clouds
  - AI-driven recommendations

Get to know Success Plans by visiting our [overview page](#) or taking the [Salesforce Success Plans Trailhead module](#). Or visit the [Salesforce Help Portal](#) for more resources. 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 current 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](#).

## Legal Documentation

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We made seasonal updates to Salesforce Legal Documents.

### Trust & Compliance

For a complete list of changes to the Trust & Compliance documents related to this release, see the [Salesforce Trust & Compliance Documentation Change Log](#).

### 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](#).