



Salesforce Release Notes

Salesforce, Summer '24

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



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SALESFORCE SUMMER '24 RELEASE NOTES

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

IN THIS SECTION:

[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 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](#)

The Salesforce release notes offer brief, high-level descriptions of enhancements and new features. They 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.

[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.

[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.

[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, Tableau, and Einstein Discovery.

[Commerce](#)

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

Salesforce Summer '24 Release Notes

Customization

Manage users more easily with the user access, public group, permission set, and permission set group summaries. Give record page users more of what they need where and when they need it with Lightning record page enhancements such as blank space support and visibility rules on individual tabs.

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 change sets.

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

Customization is key, and Experience Cloud is here to help you deliver. Integrate enhanced LWR sites with Data Cloud to gain deeper insights into site visitor interactions. Elevate your site with new styling features for forms and buttons, streamlined search options, and increased control over the layout and spacing of your LWR sites. Improve your visitor login experience with a new integration framework for headless login and guest user identity flows. Stay productive on the go with a collection of updates to the Mobile Publisher app.

Field Service

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

Industries

Industries solutions shape Salesforce to the needs of your business, reducing the need for you to customize things yourself. Consumer Goods Cloud streamlines delivery and distribution processes with Direct Store Delivery and Van Sales. Optimize service operations in the field with Field Service for Industries. Health Cloud integrates with Milliman Care Guidelines (MCG) to bring industry-standard assessments to Integrated Care Management. Loyalty Management gives marketing managers greater flexibility with Global Promotions Management. Manufacturing Cloud helps manufacturers streamline the process of recovering costs on defective parts from suppliers with Warranty Supplier Recovery. Salesforce for Education helps students plan their degrees better with Intelligent Degree Planning. We also have plenty of changes for Automotive Cloud, Salesforce for Nonprofits, Public Sector Solutions, Industries common features, and much more.

Marketing

Salesforce offers three marketing products: Account Engagement (formerly known as Pardot), Engagement (formerly known as Marketing Cloud), and Marketing Cloud Growth edition. Unified Messaging tools support Marketing Cloud Growth and other Salesforce apps.

MuleSoft

Use the MuleSoft Anypoint Platform suite of products to connect and integrate apps, systems, and data across your enterprise. Streamline operations by building and automating processes with clicks instead of code. You can design, develop, govern, and share APIs and integration apps and host them in the cloud or on-premises.

Mobile

Configure offline landing pages without code using Mobile Builder for Salesforce Mobile App, which is now generally available. Improve your Mobile Publisher app with new security features and prepare your app for new notification and device operating system requirements. Submit the required Firebase information for push notifications on Android mobile connected apps.

Salesforce Summer '24 Release Notes

[OmniStudio](#)

In Summer '24, OmniStudio (when the Managed Package Runtime setting is disabled) supports features from OmniStudio for Vlocity, including filling address fields in omniscrpts with Google Map data, using Salesforce private connect for HTTP actions in integration procedures, and choosing whether to merge entries within a list in an integration procedure list action. Also, DataRaptor is now Omnistudio Data Mapper. For Winter '25 upgrades, disable New Order Save Behavior. To prepare for future releases, remove organization and profile standard objects from data mappers, remove OmniStudio components with unlocked packages, and check the impact of the date change in the ADDDAY function return.

[Revenue](#)

Automate and scale your revenue operations with a robust portfolio of Revenue Cloud products. Use Revenue Lifecycle Management to empower your organization's sales and revenue management processes. Salesforce Billing offers efficient resolutions to all invoice processing issues.

[Sales](#)

Boost your sales teams' results with new features across Sales Cloud. Sales rep's get a boost to their productivity with standard and custom list view actions in the Account, Contact, and Lead Intelligence views. Use Generative Conversation Insights to create custom insights for video calls and get answers to things such as customer sentiment or deal terms. Sales managers have more flexibility in how they view forecasts. Enablement has an improved test and deploy experience for sales programs. And in Salesforce Maps, users experience better performance when plotting for high-volume data.

[Salesforce CMS](#)

Clone any content type and its variants, add an API name when you create an enhanced CMS workspace and content, and work with CMS content previews.

[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](#)

External Client App Manager, OAuth 2.0 token exchange handlers, and Event Log File Browser are each now available in Setup. Also, external client apps now support a bunch of new OAuth flows. Give users access to manage custom domains with a new, more targeted user permission. Create uninterrupted user experiences across Salesforce and custom interfaces with the new Single-Access UI Bridge API. Access your Data Cloud encryption policy status from the Security Center Encryption Policy metric. Scratch orgs on Salesforce Edge Network use partitioned domains. And Android mobile connected apps now require the Admin SDK private key and project ID from a Google Firebase project.

[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?

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

Learn About New and Updated Data Cloud Features More Frequently

Data Cloud releases some features and enhancements as often as monthly, so be sure to keep up with what's new as soon as it comes out. To find these release notes, just search for *Monthly Release Notes*.

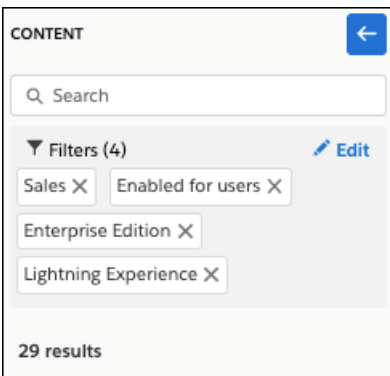
Find Updates for Marketing Cloud Engagement in One Place

Marketing Cloud Engagement release notes have moved from the documentation site to the main Salesforce Release Notes. Older Engagement release notes are archived as PDFs. This change improves organic search engine results and makes it easier to access Engagement release notes alongside other cloud information.

How to Use the Release Notes


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

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



We want to know what works for you and what doesn't.

- **Trailblazer Community**—Post your feedback in the [Release Readiness Trailblazers](#) group. To help us track and respond to your feedback, use a hashtag that indicates the release, such as #Summer24Feedback.
- **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

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.

Summer '24 Highlights for Admins

Check out this video for a preview of key features for admins in Summer '24.

 [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.
- [Summer '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.
- [Summer '24 Release Website](#). Check out the new features.
- [Summer 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.
- [Trust Status Maintenances](#). See sandbox and other release dates and times. To see your maintenance dates, click **Instances** and your instance.
- [Sandbox Refresh Calculator](#). Plan if and when to refresh your sandboxes.
- [Sandbox Preview Video](#). Learn how to navigate the sandbox preview process.
- [Sandbox Preview Instructions](#). Get early access to new features in your sandbox.
- [Certification Release Maintenance Schedule](#). Keep your certification updated in Trailhead.
- [Prepare for Salesforce Releases](#). Use Trailhead to create your release strategy.

Release 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.

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 specific seasonal release to your instance.

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

IN THIS SECTION:

[August '24 Release](#)

Learn about features released in August '24.

[July '24 Release](#)

Learn about features released in July '24.

[June '24 Release](#)

Learn about features released in June '24. Features included in the June monthly release generally become available when Summer '24 rolls out to your org.

August '24 Release

Learn about features released in August '24.

- [Data Cloud Features](#)
- [Einstein Features](#)
- [Einstein Platform](#)

July '24 Release

Learn about features released in July '24.

- [Data Cloud Features](#)
- [Einstein Features](#)
- [Einstein Platform](#)

June '24 Release

Learn about features released in June '24. Features included in the June monthly release generally become available when Summer '24 rolls out to your org.

- [Data Cloud Features](#)
- [Einstein Features](#)
- [Einstein Platform](#)

Release Note Changes

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

September 30, 2024

Removed: See the Topics That Matter Most to Your Customers with Sales Signals

This feature isn't quite ready, so we're removing it while we make improvements.

August 28, 2024

Removed: Remove OmniStudio Components from Unlocked Packages

Salesforce continues to support Omnistudio components in unlocked packages.

August 26, 2024

Deploy Data Cloud Changes from a Sandbox to Production (Beta)

Added a release note about the ability to deploy Data Cloud changes from a sandbox.

Reuse Prompt Flows to Boost Efficiency

Added a release note about reusing template-triggered prompt flows.

Transform NLP Action Results

Added a release note about the new transformNlpActionResult invocable action available with Salesforce Feedback Management.

Process Data Using GenAI

Added a release note about the new processDataUsingGenAi invocable action available with Salesforce Feedback Management.

Limit Who Receives Notifications About Certificate Expiration

Clarified which users receive certificate expiration emails the day before and the day of a certificate's expiration.

Accomplish More with Sales Copilot Topics

Added a release note about the addition of Close Deals, Communicate with Customers, Conversation Explorer, Forecast Sales Revenue, and Manage Deals Copilot Topics for Sales.

Einstein Copilot for Sales

Added a section under the Einstein for Sales.

Handle More Use Cases More Consistently with Copilot Topics on page 320

Added release note announcing Einstein Copilot topics, including new standard topics, and reasoning engine improvements.

August 19, 2024

Entice Customers with Shipping Promotions

Clarified that shipping promotions are applied automatically in B2B and D2C Commerce stores, and you can use manually applied shipping promotions during checkout in D2C Commerce stores.

Connected Services for Vehicles

New release notes announcing the general availability of Connected Vehicle capabilities in Automotive Cloud.

August 12, 2024

Configure Customer Consent for Unified WhatsApp Messages in Flow

Added a release note to announce new consent settings for unified WhatsApp messages in Flow.

Changed Connect REST API Request Bodies

Added a release note to announce the new properties in the Context Mappings Input request body.

Changed Connect REST API Response Bodies

Added a release note to announce the new properties in the Context Mapping Output, Context Node Mapping Output, and Context Attribute Mapping response bodies.

Limit Who Receives Notifications About Certificate Expiration

Clarified which users continue to receive certificate expiration emails when the new permission isn't assigned to any user.

New and Changed Invocable Actions in Health Cloud

Added a release note to announce the new Invocable Actions `getResourcesforMnlScheduling` that recommends resources to use when you manually schedule a start of care visit or recurring visits.

Rich Text Field Images No Longer Overflow Their Column Boundaries on page 202

Added a release note about this fix from Spring '24.

Get Better Performance for List Views

Updated the release note to reflect that the feature is available only in sandboxes in Summer '24.

Retain Data with Privacy Center

Updated the release note to announce that the rollout of this feature is in progress.

Set Up Checkout Details Quickly with Manged Checkout for D2C Stores on page 151

Updated the release note to reflect that Salesforce Checkout is now called Managed Checkout.

AWS Region Validation for Seamless Event Relay Execution

Added release note about AWS region validation of event relay named credentials.

Power Your Generative AI Using Anthropic Models with Prompt Builder

Fixed a typo and updated the release note for better flow.

Receive Change Event Notifications for More Objects

Added `CategorizedCareFeeAgreement` to the list of objects that you can receive change events for.

August 5, 2024

Receive Change Event Notifications for More Objects

Added `ResearchStdyCndtStatusPrd` to the list of Industries objects that you can receive change events for.

Metadata API

Added information about the new `MobileSecurityAssignment`, `MobileSecurityPolicy`, and `MobSecurityCertPinConfig` metadata types.
Added information about the existing `MobileSettings` metadata type.

New and Changed Objects

Added information about the new `MobileSecurityAssignment` object and about an update to the existing `MobileSettingsAssignment` object.

Externally Built Models in Einstein Discovery Are Being Retired

Added information about externally built model retirement in Einstein Discovery.

Search for and Draft ESG Reports (Beta)

Updated the release note about the availability of the Einstein Search for Disclosures feature.

Accessibility Enhanced in Contact Suggestions

Announced removal of subject link from the activity timeline window in Contact Suggestions.

July 29, 2024

Further Customize the Forecast Guidance You Receive in Copilot

Updated the user permission required to access the Get Forecast Guidance copilot action.

Configure Commerce with the Enhanced Setup Assistant

Added a release note to announce the enhanced Commerce Setup Assistant.

Automate and Manage Business Process Stage Transitions

Updated the availability date for the Stage Management feature.

Adopt Updated Content Security Policy (CSP) Directives (Release Update)

Enforcement of this release update is postponed to Spring '25, and Salesforce recommends additional actions for anyone who completed the release update in Summer '24.

Get Started Faster on Salesforce Extensions for Visual Studio Code with the New Documentation Site

The new documentation site has a UI that is more consistent with other developer guides.

Get Started Faster on Code Builder with the New Documentation Site

The new documentation site has a UI that is more consistent with other developer guides.

Get Started Faster on Einstein for Developers with the New Documentation Site

The new documentation site has a UI that is more consistent with other developer guides.

Metadata API

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

New and Changed CRM Analytics REST API Resources

Added information about the removal of the `wave/data-conversions` resource and its supporting requests and responses from the documentation.

Context Namespace

Added a release note to announce the new `evictContextDefinition(input)` method available with the `Context` Apex namespace.

New Invocable Actions in Life Sciences Cloud

Added a release note to announce the new invocable actions available with Life Sciences Cloud.

New Metadata Types in Life Sciences Cloud

Added a release note to announce the new metadata types available with Life Sciences Cloud.

Better Error Handling for Outdated Pages in Lightning Experience

Updated the release note to include information about the causes of outdated pages and the error messages that users can encounter.

New and Changed Standard Platform Events

Added information about the new MobileEmailEventStore, MobileEnfPolicyEventStore, MobileScreenshotEventStore, and MobileTelephonyEventStore objects.

Retain Data with Privacy Center

Updated the month when this feature begins rolling out to customers to August 2024. The previously announced timeframe was July 2024.

New and Changed Objects

Added new Copilot standard objects.

Confirm Your Components Use Supported Design System Customizations

Added a sentence with a link to the Enhanced Lightning UI rollout availability in Salesforce Help.

Get More Information from Backup and Restore Logs

Added a release note about messaging improvements to the Logs page of the Salesforce Backup managed package.

Refresh Token Rotation Now Works As Expected for Instances on Salesforce's First-Party Infrastructure on page 750

Added a release note about a refresh token rotation fix that can potentially break integrations.

Temporarily Opt Out of Google Chrome Storage Partitioning on page 103

Added information about the setting's compatibility. The setting works for users with Chrome 111 through 126 until September 3, 2024. The setting doesn't work for users on Chrome 127 as of July 23, 2024.

Enable Einstein Semantic Search in APAC Regions

Added a release note to announce that you can now enable Einstein Semantic Search in APAC regions.

New and Changed Objects

Added new UserDefinedLabel and UserDefinedLabelAssignment objects.

Show the Precise Price Breakdown in the Cart Summary

Added context regarding what pricing information is included in the subtotal and promotions line items in the cart summary.

July 22, 2024

Use the new enableScratchOrgSnapshotPref field on the DevHubSettings metadata type to create a point-in-time snapshot of a scratch org.

Get Started with Einstein for Field Service on page 347

Announced that the Einstein for Field Service Mobile license has been renamed to Einstein for Field Service and can now give all Field Service users access to Einstein features for Field Service.

Metadata API

Added a release note about updates to the EmailIntegrationSettings metadata type.

Added two release notes for fields added to the existing SvcCatalogItemDef metadata type.

Added release notes for changes made in previous releases to the SvcCatalogItemDef, SvcCatalogFulfillmentFlow, SvcCatalogItemUsageType, and ServiceProcess metadata types.

industriesDigitalLending Namespace

Added a release note for the new Apex namespace industriesDigitalLending.

Id_verification Namespace

Added a release note to announce the new properties that were added to id_verification Apex namespace.

Test Data Cloud Features in a Sandbox (Beta)

Changed the availability date of Data Cloud in sandboxes.

Prevent Unwanted Parameters in Your Auto-Response URL

Added a release note to announce changed behavior of URLs in Auto-Response components. Where we used to append every parameter to a URL, we now let you manually append the parameters using a placeholder.

Confirm Access to External Systems When Named Credentials Use the OAuth 2.0 Browser Flow

Added a release note about enhancements to authentication with the OAuth 2.0 Browser Flow.

Discover Service Capabilities with My Service Journey (Beta)

Updated the release note to mention enhanced exploration of Service Cloud capabilities with console apps.

Track Pricing Data Using Event Log Files on page 758

Added a release note to announce the Pricing Event Type.

Users Must Approve Access Every Time They Trigger the Device Flow on page 750

Added a release note about a behavior change for the OAuth 2.0 device flow.

Use More Objects for Copy Field Enrichments on page 220

Added a release note about two more objects you can use with copy field enrichments.

July 15, 2024

Monitor Product Consumption in Near Real-Time with Digital Wallet

Added a release note for the new ability to access Digital Wallet from the Your Account app.

Product and Category Record Pages Have a New Layout

Added a release note for the updated Product and Category record default page layouts.

Discover Service Capabilities with My Service Journey (Beta)

Removed Professional Edition as a supported edition for My Service Journey.

New and Changed Objects

Added a release note for an update to the ActionCadenceStepVariant and ActionCdncStpMonthlyMetric objects.

New and Changed Objects

Added a release note about the new ActivityFieldHistory object.

New and Changed Objects

Added release notes for updates to the SvcCatalogRequest and SvsCatalogItemDef objects.

Reuse Template Message Names Across Your WhatsApp Business Accounts

Added a release note about using the same template name in multiple WhatsApp Business accounts.

Focus More Easily with the Latest Visual Refresh in Sales Cloud

Updated to include specific dates that the enhanced Lightning user interface is available.

Work with Data Cloud in a Sandbox Org (Beta)

Changed the availability date of Data Cloud in sandboxes.

New Invocable Action in Quote and Order Capture

Added a release note to announce the `createContract` invocable action available with Revenue Lifecycle Management.

New Metadata Type in Quote and Order Capture

Added a release note to announce the `createContract actionType` field value available with Revenue Lifecycle Management.

Other Improvements to Scope Allocation

Added a release note to make sure that scope allocation to GHG scopes is accurate for leased vehicles and employees working from home.

Other Improvements to Custom Fuel Framework

Added a release note to announce a backported change that prevents agents from being erroneously marked offline.

Account for Latency Between Omni-Channel and Amazon Connect when Rerouting Calls

Added a release note to enhance the accuracy of carbon accounting for custom fuels and units of measure.

DataRetrieval Namespace

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

Power Your Generative AI Using Anthropic Models with Prompt Builder

Added a release note to announce the availability of Anthropic Large Language Models (LLMs) in Einstein Studio.

Power Your Generative AI with Google Gemini and Prompt Builder

Added a release note to announce the availability of the Google Gemini Pro Large Language Model (LLM) in Einstein Studio.

July 8, 2024

Quickly Deploy a Retail Onboarding Journey with Industry Solutions

Added a See Also link for late release.

Get More Subscriber Information with Package Manager Interactive Email Industry Solutions

Added a See Also link for late release.

Show Users Recommendations with Suggested for You

Added a release note about the new Suggested for You toggle in Setup.

System Informational Banners Are Now Gray

Added a release note about the change in color for system informational banners.

Manage AI Models in Einstein Studio

Added a release note about the availability of a new permission to manage AI models in Einstein Studio.

Bring Your Own Channel for Messaging (Generally Available)

Added a release note about the general availability and renaming of Bring Your Own Channel from the previous name, Partner Messaging.

New Objects in Dynamic Revenue Orchestrator

Added a release note about establishing relationship between two fulfillment orders.

New and Changed Invocable Actions in Health Cloud

Added a release note about creating the start of care or recurring home visits and assigning care resources that are manually selected by the scheduler to the visits.

New Connect REST API Resources in Health Cloud

Added a release note about finding available slots and managing quotas for therapies at various stages across multiple treatment centers.

New Connect REST API Resources

Added a release note about Application Form and Application Form Retrieve connect APIs.

New and Changed Invocable Actions

Added a release note about invocable actions available with Digital lending for Financial Services Cloud.

Standard-Volume Platform Events Are Being Retired

Added a See Also link to a knowledge article about migrating standard-volume platform events.

Enable Calculation Metadata for Export

Updated the release note to reflect the new configuration that turns on Export Carbon Calculations.

Answer Questions Easily with Knowledge and Generative AI

Updated the release note with the renaming of Generative Knowledge Answers from the previous name, Answer Questions with Knowledge copilot action for Einstein Bots.

New and Changed Connect REST API Resources

Added a release note about deleting an activation via Connect API in Data Cloud.

Engagement Data Retention and Access Policy on page 557

Added a release note that describes a new data retention policy for Marketing Cloud Engagement.

Preview Your Processing Service

Updated the release note to remove references that suggested previewing the managed package.

New and Changed Financial Services Cloud Object Fields

Added a release note about new and change Digital Lending objects.

July 1, 2024

Work with Data Cloud in a Sandbox Org (Beta)

Added a release note about the availability of Data Cloud in sandboxes.

Org Size Limit for Activity 360 Reporting

Added a release note that Activity 360 reporting is available for orgs with up to 1.5 million combined accounts, contacts, contracts, leads, and opportunities.

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

Added information about where to find best practices for enabling this release update.

Unify Knowledge from Various Sources in Salesforce (Generally Available)

Added to the release note the multilingual support feature.

Lock and Unlock Records with an Action

Updated the See Also link to the Salesforce Help: Flow Core Action: Lock Record topic.

Engagement: Archived Release Notes

Added a link to the Spring '24 Marketing Cloud Engagement release notes archive PDF.

Product Service Campaign

Updated the release notes to indicate that the user interface of Product Service Campaign is available in English only and may not be fully supported in other languages.

Work Order Estimation

Updated the release notes to indicate that the user interface of Work Order Estimation is available in English only and may not be fully supported in other languages.

Supplier Recovery Claims

Updated the release notes to indicate that the user interface of Warranty Supplier Recovery is available in English only and may not be fully supported in other languages.

Warranty Supplier Recovery

Updated the release notes to indicate that the user interface of Warranty Supplier Recovery is available in English only and may not be fully supported in other languages.

Geo-Aware LLM Request Routing Is Available in the Einstein Generative AI Platform

Added a release note about the availability of geo-aware LLM request routing.

Improve Listing Accessibility with Alt Text In Carousel Images

Added a release note about an alt-text requirement for AppExchange listing images.

Organize and Find Records Easily with Personal Labels

Added information about limits on record labels.

Increase Sandbox Security with Inactive User Freezing

Added logistical details about who's affected and why we're running this process.

Select Who Has Sandbox Access for Production Orgs with 60 or More Public Groups

We expanded support for providing sandbox access through a public group if your production org has 60 or more public groups.

Add Company and Buyer Information to Contacts Automatically

Updated the release note to show that the feature is available.

Create Contacts Automatically from Email and Calendar Interactions

Updated the release note to show that the feature is available.

Removed: Customize Mobile Publisher Android App Permission Requests to Post Notifications

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

Generate a Client Trace ID to Troubleshoot Non-Pub/Sub API Errors

Added a release note about tracing requests in Pub/Sub API for non-Pub/Sub API errors.

Store Outcome Data in the Patient Program Outcome Management Data Model (Pilot)

Updated the who part.

Calculate Outcome Metrics Using Salesforce Flows (Pilot)

Updated the who part.

Store Outcome Data in the Patient Program Outcome Management Data Model (Pilot)

Updated the who part.

Calculate Outcome Metrics Using Salesforce Flows (Pilot)

Updated the who part.

Focus More Easily with the Latest Visual Refresh in Sales Cloud

Added information about compatibility for add-on features.

Resolve Unhandled Exceptions Faster with Additional Information in Apex Exception Emails

Updated the release note to exclude username from exception email information.

June 24, 2024

Process Builder Is Retiring for Marketing Cloud Connect

Added the release note to reflect the delayed feature release.

Add Company and Buyer Information to Contacts Automatically

Updated the release note to reflect the delayed feature release.

Create Contacts Automatically from Email and Calendar Interactions

Updated the release note to reflect the delayed feature release.

Apply Additional Service Assets in Data Cloud

Added a release note to announce the availability of version 4.0 of the Service data kit.

New and Changed Objects on page 287

Added a release note for supported enum values in the `LoginSubType` field on the `LoginHistory` object.

Track Who Ends Enhanced Messaging Sessions on page 805

Updated the release note to indicate that the `EndedByType` field is available in custom report types, but not in messaging session list views.

Customize Secure Forms with New Settings on page 799

Updated the release note to indicate that the new properties apply only to forms sent in enhanced Apple Messages for Business channels.

Focus More Easily with the Latest Visual Refresh in Sales Cloud

Added information about visual changes in Sales Cloud in Professional and Enterprise editions.

Metadata API on page 303

Added information about the new `enableLightningLoggerEvents` field on the existing `EventSettings` metadata type.

Enhance Routing with Omni-Channel for Government Cloud Plus

Added a release note about Omni-Channel for Government Cloud Plus on Hyperforce.

Find Your Packages Faster in the AppExchange Partner Console

Added a release note to announce package search feature.

Get Better Performance for List Views

Updated the release note to reflect the feature's rolling release schedule.

New and Changed Connect REST API Resources

Added a release note about changes to the List Share Recipients Connect API resource.

Enable LWC Stacked Modals (Release Update)

Added a note about using Dynamic Forms via a Create from Lookup field.

New and Changed Objects on page 287

Added a release note for viewing customer segments with the `MarketSegments` field on the `PipelineInspectionListView` object.

New and Changed Objects on page 287

Added a release note for viewing a list of Prospecting Center accounts with the `MY_PROSPECTING_CENTER_ACCOUNTS` value on the `viewType` field on the `PipelineInspectionView` object.

New and Changed Objects on page 287

Added a release note for marking contacts and leads as important with the `IsPriorityRecord` field on the Contact and Lead objects.

New and Changed Objects on page 287

Added a release note for marking accounts as important with the `IsPriorityRecord` field on the Account object.

Connect REST APIs on page 534

Added a release note to announce the changes made to the request and response bodies of Unified Object Search Data.

Patient Program Outcome Management (Pilot)

Updated the title to clarify that it's a pilot feature.

Store Outcome Data in the Patient Program Outcome Management Data Model (Pilot)

Added the who part and updated the title to clarify that it's a pilot feature.

Calculate Outcome Metrics Using Salesforce Flows (Pilot)

Added the who part and updated the title to clarify that it's a pilot feature.

View a Comprehensive Summary of Patient's Member Plans

Updated release notes to reflect the Who part for the new generally available product for Health Cloud, Pharmacy Benefits Verification.

Raise Verification Requests for Pharmacy Benefits

Updated release notes to reflect the Who part for the new generally available product for Health Cloud, Pharmacy Benefits Verification.

Record Responses from Payers

Updated release notes to reflect the Who part for the new generally available product for Health Cloud, Pharmacy Benefits Verification.

Patient Program Outcome Management (Pilot)

Updated the title to clarify that it's a pilot feature.

Store Outcome Data in the Patient Program Outcome Management Data Model (Pilot)

Added the who part and updated the title to clarify that it's a pilot feature.

Calculate Outcome Metrics Using Salesforce Flows (Pilot)

Updated release notes to reflect the Who part for the new generally available product for Life Sciences Cloud, Pharmacy Benefits Verification.

Metadata API

Added a release note about the new `string` value in the existing `dataType` field, which is on the existing `FlowCapabilityInput` subtype of the Flow metadata type.

June 17, 2024

SOQL

Added clarification on when the use of NULL triggers the new error code.

Copy Large Datasets Efficiently in Automation Studio

Updated the title and content of the Data Copy or Import release note for clarity.

Einstein Data Detect Is Now Data Detect

Added a release note announcing the product name for Einstein Data Detect.

New and Changed Standard Platform Events

Added release notes for two new fields on the Insecure External Assets event type.

New and Changed Objects

Added a release note for updates to the PromptVersion object.

Connect REST APIs

Added release notes to announce the new resource and properties available with Context Service.

New Connect REST API Resource in Record Rollup Definitions

Added a release note to announce the new resource available with Record Rollup Definitions.

Review Updated URLs for List Views

Added a release note that announces changes to the URL format for list view pages.

Encrypt Search Index Keys with Manageable Root Keys

Updated the release note to reflect that when an org's search indexes are upgraded to support root keys, Salesforce automatically generates a Salesforce root key and data encryption key for you.

Unify Knowledge from Various Sources in Salesforce (Generally Available)

Updated the release note with a link to the blog post *10 Ways To Prep Your Knowledge Base for AI Grounding*.

Give Feedback on Copilot Responses

Added a release note that announces feedback on Einstein Copilot responses.

See Records from Different Objects in Einstein Copilot's Responses

Added a release note that announces multi-object records in responses given by Einstein Copilot.

Use AI to Set Course and Program Expectations with Einstein Skills Generator

Added a release note that announces Einstein Skills Generator for Education Cloud.

Einstein for Fundraising (Beta)

Added a release note that announces Copilot Actions Fundraising Gift Proposals as part of Fundraising in Education Cloud.

Update Your Firebase Cloud Messaging API Certificate for Mobile Push

Added a release note announcing the need to update the Firebase Cloud Messaging (FCM) API certificate to continue sending mobile push notifications in Marketing Cloud Personalization.

Updated Default Behavior of Visualforce Section Header Components

Added a release note about the new default behavior of the Visualforce `<apex:sectionHeader>` component's `description` attribute.

Life Sciences Cloud (Generally Available)

Added release notes for the new generally available product, Life Sciences Cloud.

Patient Program Outcome Management (Pilot)

Added release notes for the new pilot feature, Patient Program Outcome Management.

Pharmacy Benefits Verification

Added release notes for the new generally available product, Pharmacy Benefits Verification.

Keep the Pub/Sub API Publishing Stream Alive More Easily

Added release notes for the increased timeout of the Pub/Sub API `publishStream` RPC method.

Hide Global Search for Specific Lightning Apps

Added a release note announcing the ability to hide global search in specific Lightning apps in Salesforce Mobile app.

Run Flows in Bot User Context (Release Update)

Updated the scheduled enforcement to Winter '25.

Removed: Build Custom Forms with the ElementInternals Web API

This feature isn't quite ready, so we're removing it while we make improvements.

See Only Actions You Can Use in Mobile Builder

Added a release note announcing that the only actions that now show in Mobile Builder are LWC Global actions.

Organize and Find Records Easily with Personal Labels

Clarified that labels can be used with custom objects. Also added detail that the Label object and its record page layout aren't editable.

Keep Routing Work During Service Degradation

Added release notes for the new feature, Omni-Channel Fallback Mode.

Salesforce CLI Enhancements

Updated the list of Salesforce CLI enhancements with information about the Source Mobility (beta) feature.

Optimize Data Retrieval with Cache-First (Beta)

Added release note to announce the release of the Cache-First (beta) feature.

Improve Search Results with Einstein Semantic Search

Added that semantic search is available in North America and Europe and will be available in the Asia-Pacific region in Summer '24.

Removed: Authenticate Messaging for Web in Channel Menu with User Verification

Removed the release note about supporting user verification on Messaging for Web deployments that are added to Channel Menu. The release of this feature is postponed.

June 10, 2024

Stage Management

Added the When section to the Stage Management release notes.

Removed: Look Up Data from DMOs for Your Org

This feature isn't quite ready, so we're removing it while we make improvements.

Removed: Call Component Lifecycle Hooks Using Native Browser APIs

This feature isn't quite ready, so we're removing it while we make improvements.

New and Changed Objects

Added a release note to announce that the CustomObjectUserLicenseMetrics object was removed.

Limit Who Receives Notifications About Certificate Expiration

Added more information about how certificate expiration email notifications behave and what to expect when the new user permission isn't assigned to any user.

Identify and Backfill Missing Call Transcripts in Bulk

Updated See Also link to the implementation guide.

Test CRM Analytics Endpoints in Postman

Added release note for new CRM Analytics Postman collection.

Log Emails and Events More Intuitively

Added release notes for updates to quick logging emails and events in an Outlook or Gmail integration.

Encrypt Search Index Keys with Manageable Root Keys

Added a release note about root keys for search index encryption, which is now available on a rolling basis throughout the Summer '24 release.

Capture a Scratch Org's Configuration with Scratch Org Snapshots (Generally Available)

This feature will be available on a rolling basis starting in late June 2024.

Improve Search Results with Einstein Semantic Search

Clarified that we removed Product SKU as a default sortable field on search and category pages in new D2C stores.

Context Namespace

Added a release note to announce the new Context Apex namespace.

Import Your Common App Data into Education Cloud

Added a release note to announce the new Data Importer for Common App.

Removed: Conceal Sensitive Information When Your Experience Cloud App is in the Background

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

See Improved Contrast in Focus States

Added more image examples of increased color contrast focus states.

Send Real-Time Event Monitoring Events to Amazon EventBridge with Event Relays

Added a release note to announce the availability of real-time event monitoring events with event relays.

Removed: See More Results with Advanced Lookup Search

This feature has been removed while we make improvements.

Metadata API

Added a new enumeration value, `SourceDate`, to the `type` field in the `MLField` metadata type.

Adjust Service Appointments with Visiting Hours to Your Local Time Zone

The How section was updated to indicate the correct location of the setting in the UI.

New Metadata Type

Added a release note to announce the new metadata types, `CollectionsDashboard` and `InvLatePymntRiskCalc`.

Salesforce Subscription Management

Added a release note to announce the new metadata type `SubscriptionManagementSettings`.

Simultaneous Token Requests Are Blocked During the Refresh Token Flow

Added a release note about a new error for the refresh token flow that can impact integrations.

New Connect REST API Resources

Added a release note to announce the new Retrieval Summary Connect API.

View Fields That Are Encrypted Under Your Shield Platform Encryption Policy

Added a release note to announce the new Field Level Encryption metric.

Improve the Convenience of Setting Up Meeting Requests

Added a release note to announce the new Send Meeting Request copilot action.

June 3, 2024

Data Cloud Related List Enrichments Now Support Accounts

Updated release note to specify a roll-out date for June, 2024.

New Invocable Actions for Einstein Bots

Added a release note about new invocable actions and a changed metadata type for Einstein Bots.

Unify Knowledge from Various Sources in Salesforce (Generally Available)

Added a link to the new Unified Knowledge: Quick Look badge on Trailhead.

Grant Access to the Label Object In Custom Profiles To Continue Using To Do List Labels (Release Update)

Added a release note about a release update requiring custom profiles to include access to the Label object to allow continued use of labels in the To Do List.

Search for Any Price Book with the Redesigned Price Book Component

Added a new release note to announce the redesigned UI for the price book component in Salesforce Pricing.

New Metadata Type

Added a release note to announce the IndustriesPricingSettings metadata type in Salesforce Pricing.

Support Customers While on the Go with Omni-Channel for Mobile (Beta)

Updated the release note to mention that this feature will be available after June 15, 2024. Also updated the instructions for granting a user access to Omni Mobile in the Salesforce Mobile app.

Get Improved Accessibility in List Views

Clarified that the ability to navigate related lists with the key combination Ctrl+Alt+arrow key (Windows) or Cmd+Option+arrow key (macOS) was first available in Spring '24.

Other Improvements in Screen Flow Components

Updated the release note to mention that screen readers are now able to announce when no items are selected in a Data Table component.

Use Supported Locales in the Einstein Generative AI Platform

Added release note that lists supported languages and locales in the Einstein Generative AI platform.

May 27, 2024

Stage Management

Added the release notes for Stage Management, which is an Industries common feature.

New and Changed Objects

Added release notes for the new `NamespacePrefix` field in the `OauthCustomScope` object and the `OptionsEmbeddedLoginEnable` field in the `Network` object.

Catch Up On Emails Quickly with Einstein Work Summaries for Email (Generally Available)

Updated names.

Use AI to Offer Conversational Recommendations and Add Products to Cart

Added a release note to clarify that new Health Cloud customers no longer have access to the Health Cloud managed package.

Help Partners Send Personalized Sales Emails Fast

Revised the required add-on license. Customers require Einstein for Sales, not Sales Cloud Einstein.

Removed: See the Topics That Matter Most to Your Customers with Sales Signals

This feature isn't quite ready, so we're removing it while we make improvements.

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.

Get Set Up Quicker with the Updated Commerce Assistant

Added a link to a video that shows using the Commerce Setup Assistant.

New Fundraising Metadata Types

Added a release note to announce the new AffinityScoreDefinition metadata type available with Fundraising in Nonprofit Cloud.

Disable CTR Sync for Voice Call Records

Added information about how to disable CTR Sync.

Let Einstein Build a Draft Flow for You (Beta)

We're delaying the release of this feature while we make improvements. A When section was added and the enablement information was updated.

Marketing Cloud Engagement Release Notes

Added the Marketing Cloud Engagement release notes for Summer '24.

Ensure Security in Search with Search Manager

We're delaying the release of this feature while we make improvements. Added a When section.

Other Changes in Marketing Cloud Growth

Added a release note about data kit and analytics package updates.

Create Contacts Automatically from Email and Calendar Interactions

Added information about automatically created contacts not eligible for automatic contact enhancement unless they're in a Buyer Relationship Map.

Add Company and Buyer Information to Contacts Automatically

Added information about automatically created contacts not eligible for automatic contact enhancement unless they're in a Buyer Relationship Map.

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

We're postponing this release update for production instances, but not for sandboxes. Updated the enforcement date for production instances to Spring '25.

Download Up to 1 Year of Event Log Files

Updated the release note to state that this feature is only available in Enterprise, Performance, and Unlimited editions.

May 20, 2024

Share Visit is Retiring

Added a release note to announce the Share Visits feature deprecation for Consumer Goods Cloud.

Get Meaningful Recommendations with Account Summarization (Beta)

Added a release note to announce the Generative AI Account Summarization feature for Consumer Goods Cloud.

Digital Lending

Updated the names of Digital Lending features. Underwriter Workbench is now called Underwriter Console. Self-serve experience is now called self-service application intake and agent-assisted application experience is now called assisted application intake.

Metadata API

Added a release note about the new SearchOrgWideObjectConfig metadata type.

Create Contacts Automatically from Email and Calendar Interactions

Changed available threshold values to up to 3. Previously, they were from 3 to 10.

Let Einstein Build a Draft Flow for You (Beta)

Added information about how to enable Einstein for Flow.

Prepare for Restrictions on Salesforce Cookie Use

Clarified the use cases.

Connect REST APIs

Added release notes to announce the new and changed Connect REST APIs available with Product Configurator.

Answer Questions Easily with Knowledge and Generative AI

Clarified how admins can enable the feature.

Connect REST APIs

Added release notes to announce the new and changed Connect REST APIs available with Product Catalog Management.

Connect REST APIs

Added release notes to announce the new and changed Connect REST APIs available with Salesforce Pricing.

Receive Change Event Notifications for More Objects

Added new objects that support change event notifications.

Find Content on Managing Users and Data Access in One Place

Added a release note about improvements to Help content.

Create, Update, Get care plan tasks

Added release notes to announce the new Connect REST APIs available with Care Plan Tasks.

Einstein for Service Catalog (Beta)

Clarified that Einstein Copilot in Service Catalog is a beta service.

Removed: Identify Your Best Prospects with Prospecting Center

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

Removed: Find Your Next Customer with Account Scoring

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

New and Changed Objects

Announced the new GeolocationBasedActions object, a new field on the FieldServiceMobileSettings object, and a new field on the Quotes object.

Create a Custom UI Solution for Messaging for In-App and Web (Beta)

Added a release note about a new deployment type in Messaging for In-App and Web.

Apex: New and Changed Items

Added the new sfdc_enablement namespace.

New Invocable Action in Dynamic Revenue Orchestrator

Added a release note to announce the new invocable action available with Dynamic Revenue Orchestrator.

New Metadata Type in Dynamic Revenue Orchestrator

Added a release note to announce the new `actionType` field value, which is on the FlowActionCall subtype of the Flow metadata type.

Access the Recent Activity Timeline on the Salesforce Mobile App with Copilot Enabled

Added a release note to highlight that Salesforce Mobile app users can now see their Recent Activity timeline with Einstein Copilot enabled.

Boost Sales Productivity with the Group Benefits App

Added an instruction to not install the Insurance managed package if the OmniStudio Foundation managed package is already installed. Having both packages installed results in duplicate components, and the Group Benefits app doesn't work in orgs with duplicate OmniStudio components.

Manage Your Event Subscriptions with Pub/Sub API (Beta)

Updated release notes to remove a statement about when to commit a Replay ID. Replay ID commit details are covered in the developer guide.

New Connect REST API Resource in Salesforce Scheduler

Added a release note to announce the new Connect REST API for Salesforce Scheduler.

Removed: Implement Health Cloud Without the Managed Package

We've removed this release note and replaced it with a newer one. The removed release note did not indicate that new Health Cloud customers no longer have access to the managed package.

End of Distribution for the Health Cloud Managed Package

Added a release note to clarify that new Health Cloud customers no longer have access to the Health Cloud managed package.

May 13, 2024

Revenue Lifecycle Management Videos

Added a release note announcing the new Revenue Lifecycle Management video.

New Objects in Dynamic Revenue Orchestrator

Added a release note about the new Dynamic Revenue Orchestrator objects.

Code Builder

Added link to off-cycle Code Builder release notes on GitHub.

Tailor Your Enablement Programs to Your Company's Preferred Content System - Developer Preview

Added developer preview disclaimer to topic.

Added Who section to the topic.

Added See Also links to the topic.

New and Changed Objects for Grantmaking

Removed picklist values from Outcome Management objects' type fields.

New and Changed Connect REST API Resources

Added a release note about the new Data Cloud Connections Connect API resources.

Metadata API

Added an entry about custom field attributes in Data Cloud objects.

Experience Improved Performance for Big Objects

Added a release note about processing changes to Big Objects.

Metadata API

Added two Einstein Copilot types: GenAiFunction, GenAiPlanner.

Tooling API New and Changed Objects

Added two Einstein Copilot objects: GenAiFunctionDefinition, GenAiPlannerDefinition.

Lightning Web Security Enablement Rollout Postponed

Added a release note about LWS enablement status.

API Distortion Changes in Lightning Web Security

Added a release note about LWS distortion updates.

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

Updated the enforcement date for this release update from Winter '25 to Spring '25.

Let Einstein Build a Draft Flow for You (Beta)

Added more details to the Einstein for Flow release note.

Work More Efficiently with the Improved Your Account Interface

Updated the text and note to that certain users cannot view the new horizontal tab navigation in Your Account unless certain user profile tab settings are changed. Added links to help docs which provide instructions on changing the tab settings.

Find and Buy Salesforce Products Faster with the Improved Product Catalog

Added a note that certain users cannot view the new horizontal tab navigation in Your Account unless certain user profile tab settings are changed. Added links to help docs which provide instructions on changing the tab settings.

Other Changes to Salesforce Scheduler

Added a note that lists small but important improvements to Salesforce Scheduler.

Metadata API

Added a release note to announce the new ApplicationRecordTypeConfig metadata type.

Boost Sales Productivity with the Group Benefits App

Added information about required packages, permissions, and configuration.

Help Partners Send Personalized Sales Emails Fast

Partner users can get support from Einstein generative AI to draft messages to their contacts and leads from Experience Cloud Aura sites by using Einstein Sales Emails.

Digital Lending—India

Added a release note to announce the Digital Lending—India feature that support banks and financial institutions in India with an end-to-end loan origination solution.

Control Access to Service Processes by Listing Them as Products

Added a release note to announce the integration of Service Process Studio with Product Catalog Management feature. You can now control access to service processes by listing them as products.

Transaction Dispute Management

Added a release note to announce the integration of Transaction Dispute Management with Mastercom[®] feature. You can now resolve transaction disputes with an efficient chargeback process.

Removed: Access Salesforce In More Regions With Hyperforce

The latest region for Hyperforce isn't quite ready, so we've removed it from this release.

Confirm Your Components Use Supported Design System Customizations

Updated the release note title to clarify the conditions that can require updates to component customizations.

Connect REST APIs

Added release notes to announce the new and changed Connect REST APIs available with Product Discovery.

Improved Clean Up Process for Invoice Runs

Updated the release note to clarify enhancements made to the invoice run clean-up process.

Use the Token Exchange Flow with More Identity Providers

Added a release note about support for larger third-party tokens when using the OAuth 2.0 token exchange flow.

Answer Questions Easily with Knowledge and Generative AI

Updated the release note to include details on when the feature will be available.

Use Smart Totals with Formula Fields

Added a release note about support for smart totals in Data Cloud reports.

May 6, 2024

Use a CSV File as a Data Source

Added open pilot disclaimer to topic.

Copy and Report On Search Results

Added details about setting up the Copy Records and Create Report search actions.

Preview Your Processing Service

Added details about testing a new version of CG Managed Package in your sandbox environment.

New and Changed Financial Services Cloud Object Fields

Added a release note to announce the `CanUseInIntegrationOrch`, `IsManual`, `OmniUiCardConfigId`, and `StorePayload` fields on the existing `IntegrationProviderDef` object.

Let Einstein Build a Draft Flow for You (Beta)

Changed the product availability from generally available to beta.

Update More Commitments With Fundraising

Added information about using the Business Process API in Postman.

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

Updated the enforcement date for this release update to Spring '25.

Retain Data with Privacy Center

Added a release note about an upcoming feature in Privacy Center.

Easily Organize Cadence Builder 2.0 Cadences

Added a release note about saving Cadence Builder 2.0 cadences to any folder.

Mock SOQL Tests for Data Cloud Objects

Updated the limitations with stub implementation and the sample code.

Elevate Retirement

Added release note about Elevate retirement.

foundationConnect Retirement

Added release note about foundationConnect retirement.

Refine Access with Data Spaces Feature Permissions

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

Evaluate Dynamic Formulas in Apex (Beta)

Added a code sample.

Answer Questions Easily with Knowledge and Generative AI

Changed the product availability from beta and generally available.

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.

Benefit from Simplified Org Migration with Automatically Migrated Change Sets

Added a release note to announce that change sets are migrated with org migrations.

April 29, 2024

Get the Latest LWC Changes with LWC API Version 61.0

Consolidated these versioned changes into the LWC API Version 61.0 release note:

- [Update Your Light DOM Components for Improved Slot Forwarding](#)

New and Changed Modules for Lightning Web Components

Removed the beta label on the `lightning/platformUtilityBarApi` module.

Metadata API

Added a release note about the new `csvDelimiter`, `fileIdentifier`, `filePath`, and `dataType` fields on the existing `BatchCalcJobDefinition` metadata type.

Intelligent Analytics Apps

Updated link to Field Service Intelligence.

Manage Your SMS Request and Flow Experience

Added a release note about the new SMS features for Unified Messaging.

Register More API Specifications with Support for YAML

Updated a release note about the 3 MB maximum file size limit on YAML-formatted specifications.

Let Einstein Build a Draft Flow for You (Beta)

Updated the editions where Einstein for Flow is available.

Answer Questions Easily with Knowledge and Generative AI

Updated the release note to clarify that the feature is available in English only.

Query Low-Latency Event Data with Event Log Objects (Beta)

Updated the release note to state that the event log object framework (beta) is only available to a subset of US East Hyperforce customers.

Metadata API

Added a release note to announce the `isAutoExtractedValue` field on the existing `OcrSampleDocumentField` subtype of the `OcrSampleDocument` metadata type.

April 24, 2024

Salesforce Summer '24 Release Notes

Published preview release notes.

Supported Browsers

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

IN THIS SECTION:

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

See the supported browsers and devices for Lightning Experience.

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

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

See the supported browsers and devices for Lightning Experience.

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.

	Microsoft® Internet Explorer®	Microsoft® Edge (non-Chromium)	Microsoft® Edge Chromium	Google Chrome™	Mozilla® Firefox®	Apple® Safari®
Lightning Experience	Not supported	Not supported	Supports latest stable browser version. Internet Explorer mode for Microsoft Edge Chromium isn't supported.	Supports latest stable browser version	Supports latest stable browser version	Supports latest stable browser version
Experience Builder sites	Not supported	Not supported	Supports latest stable browser version. Internet Explorer mode for Microsoft Edge Chromium isn't supported.	Supports latest stable browser version	Supports latest stable browser version	Supports latest stable browser version
Special setup considerations?	Not supported	Not supported	No	No	No	No
Limitations?	Yes	Yes	Yes	No	Yes	Yes

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

Tablet Browsers

Use Apple Safari on iPadOS (iOS 13.x or later). . Lightning Experience on iPad Safari doesn't support portrait orientation and orientation switching. Use landscape orientation, and maximize your Safari browser to full width. To prevent your tablet from switching orientation, turn on the iPad rotation lock.

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

	Apple® Safari®	Google Chrome™	Other Browsers	Salesforce Mobile App
iPadOS	Supported	Not supported	Not supported	Supported
Android	—	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.

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

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.

Salesforce Overall

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

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

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Create and Verify Your Default No-Reply Organization-Wide Email Address to Send Email (Release Update)		✓		
Enable LWC Stacked Modals (Release Update)			✓	
Add the New Setup Domain (not immediately available)	✓			
Prepare for Restrictions on Salesforce Cookie Use		✓		
Temporarily Opt Out of Google Chrome Storage Partitioning		✓		
MFA Is On by Default for Direct Logins to Production Orgs		✓		
Salesforce Admins Get In-App Reminders If MFA Is Turned Off		✓		
Better Error Handling for Outdated Pages in Lightning Experience (not immediately available)	✓			
See Improved Contrast in Focus States	✓			
Monitor Net Zero Cloud Changes with Field History Tracking			✓	
Work More Efficiently with the Improved Your Account Interface	✓			
Find and Buy Salesforce Products Faster with the Improved Product Catalog	✓			
Monitor Product Consumption in Near Real-Time with Digital Wallet	✓			
Experience Improved Performance for Big Objects				
Show Users Recommendations with Suggested for You	✓			
System Informational Banners Are Now Gray	✓			
Salesforce Scheduler				
Invite Customers to Enroll in Group Service Appointments		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Enable Unauthenticated Users to Modify Service Appointments		✓		
Generate Personalized Appointment Invitation Emails with Prompt Builder	✓			
Other Changes to Salesforce Scheduler			✓	
New Connect REST API Resource in Salesforce Scheduler		✓		
Einstein Search				
IdeaExchange Delivered: Improve Search for Users with Search Manager (Generally Available)				
Other Improvements in Search Manager		✓		
Provide Relevant Results with Objects to Always Search in Search Manager (Generally Available)		✓		
Ensure Security in Search with Search Manager		✓		
Improve Search with Insights from Search Analytics (Pilot)			✓	
Salesforce Data Pipelines				
Access Your Snowflake Data Using VPC on AWS (Pilot)	✓			
Optimize Recipes That Use the Local Salesforce Connection (Pilot)	✓			

Analytics

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

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Unified Analytics Experiences				
Post from CRM Analytics to Slack	✓			
Access Any Analytics Collection in Lightning Pages	✓			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Data Cloud Reports and Dashboards				
Summarize Complex Data with Matrix Reports	✓			
Analyze Data from Unified Objects and Related Source Objects	✓			
Export More Records from Data Cloud Reports	✓			
Build More Granular Reports on Calculated Insights	✓			
Unlock Insights from Unstructured Data	✓			
Add Calculated Fields to Your Data Cloud Reports with Einstein Generative AI			✓	
Use Smart Totals with Formula Fields	✓			
CRM Analytics				
Analytics Experience and Visualizations				
Amplify Visual Impact In Waterfall Charts with Conditional Formatting	✓			
Embed CRM Analytics Dashboards in LWR Sites (Generally Available)			✓	
Get More Functionality with the New Dashboard Lightning Web Component (Generally Available)			✓	
Data Integration				
Optimize Recipes That Use the Local Salesforce Connection (Pilot)	✓			
Access Your Snowflake Data Using VPC on AWS (Pilot)	✓			
Analytics Development				
Test CRM Analytics Endpoints in Postman		✓		
Intelligent Analytics Apps	✓			
Einstein Discovery				
Externally Built Models in Einstein Discovery Are Being Retired		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Tableau	✓			
Marketing Cloud Intelligence	✓			

Commerce

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

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Salesforce B2B and D2C Commerce				
Switch to an Improved Merchant Experience with the Refreshed Commerce App				
Improve the Look and Feel of Your Store with the Refreshed D2C Template			✓	
Commerce Einstein				
Improve Search Results with Einstein Semantic Search			✓	
Enable Einstein Semantic Search in APAC Regions			✓	
Commerce Setup				
Use Tailored Guided Steps for Quick Store Setup		✓		
Get Set Up Quicker with the Updated Commerce Assistant		✓		
Configure Commerce with the Enhanced Setup Assistant		✓		
Activate and Publish a Store Without a Custom Domain				
Streamline Store Creation with Smart Defaults				
Set Up Person Accounts with One Click			✓	
Share Your Store Setup Experience with In-App Feedback		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Guest Access to D2C Stores Is Automatically Enabled		✓		
Include Attachments When Importing Products				
Commerce Cart and Checkout				
Set Up Checkout Details Quickly with Manged Checkout for D2C Stores		✓		
Automate Your Shipping Setup with Managed Checkout		✓		
Provide Shoppers Estimated Delivery Dates at Checkout		✓		
Improve the Shopping Experience with an Add-to-Cart Success Message		✓		
Show the Precise Price Breakdown in the Cart Summary		✓		
Give Shoppers More Options with Coupons at Checkout		✓		
Improve Checkout with a Guided Flow		✓		
Dynamically Display Cart Information at Checkout		✓		
Commerce Search				
Automatically Rebuild Your Search Index			✓	
Get Improved Page Performance with Displayable Product Fields (Beta)	✓			
Sort Products by SKU	✓			
Improve Your Browse Experience with the Redesigned Product List Page	✓			
Data Cloud for Commerce				
Drive Business Insights and Grow Revenue with Data Cloud for Commerce			✓	
Get Performance Insights with the Inventory Intelligence Analytics Dashboard			✓	
Review Product Behavior with the Product Intelligence Analytics Dashboard			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Understand Shopper Behavior with the Shopper Intelligence Analytics Dashboard			✓	
Bring Inventory Data into Data Cloud with the Omnichannel Inventory Connector		✓		
Deliver a Personalized Customer Experience Using Data Cloud Segments				
Use AI to Offer Conversational Recommendations and Add Products to Cart		✓		
Commerce Promotions				
Create Promotions with Ease Using a Template	✓			
Entice Customers with Shipping Promotions	✓			
Configure Promotion Segments with More Flexibility	✓			
Highlight Promotional Pricing in Your Store	✓			
Commerce Components				
Blend Social Media into Your Commerce Store with the Social Links Component			✓	
Improve the Shopper Experience with Enhanced Components			✓	
Commerce Store Management				
Goals and Recommendations Is Now Part of the Insights and Actions Workspace	✓			
Enhance Store Performance with More Recommended Actions	✓			
View the History and Status of Accepted Actions	✓			
Use Visibility Rules to Manage What Buyers See	✓			
Commerce Dashboards				
Analyze Payment Performance with the Commerce Payments Dashboard	✓			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Measure the Effectiveness of Your Promotions with the Commerce Promotions Dashboard	✓			
Track Your Store's Financial Health with the Commerce Finance Dashboard	✓			
Get Order Summary Entity Data in the Business Overview Dashboard	✓			
Additional Commerce Features				
Automate Tax Processes with the New Salesforce Tax Solution for Managed Checkout (Generally Available)		✓		
Preview Added Products in Your Store Before Activating		✓		
Salesforce Tax Solution Is Renamed Manual Salesforce Tax Solution		✓		
Use a Single Custom Domain for Multiple Commerce Sites		✓		
Customize Your Salesforce Content Delivery Network (CDN) Settings for Commerce LWR Stores			✓	
Product and Category Record Pages Have a New Layout	✓			
Salesforce Order Management				
Exchange Fulfilled Items Using UI Flows	✓			
Bulk-Edit Items on Cancel, Discount, Return, and Return RMA Flows	✓			
Salesforce Payments				
Simplify Payments Setup Using the Commerce Setup Assistant		✓		
Save Time Setting Up a Merchant Account Using Managed Checkout		✓		
Get Pay Now with a Payments License Purchased from Your Account				✓
Offer Shoppers One-Click Checkout with Passwordless Login			✓	

Customization

Manage users more easily with the user access, public group, permission set, and permission set group summaries. Give record page users more of what they need where and when they need it with Lightning record page enhancements such as blank space support and visibility rules on individual tabs.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Permissions and Sharing				
IdeaExchange Delivered: Get a Summary of a User's Permissions and Access				
IdeaExchange Delivered: See Where a Public Group Is Used				
IdeaExchange Delivered: See What's Enabled in Permission Sets and Permission Set Groups (Generally Available)				
IdeaExchange Delivered: Automate and Migrate User Access with User Access Policies (Generally Available)				
Update the Order Field for Existing User Access Policies				
IdeaExchange Delivered: Allow Users to Freeze Users and Monitor Login History Without the Manage Users Permission				
Find Content on Managing Users and Data Access in One Place				
Lightning App Builder				
IdeaExchange Delivered: Use Blank Spaces to Align Fields on Dynamic Forms-Enabled Pages				
IdeaExchange Delivered: Set Conditional Visibility for Individual Tabs in Lightning App Builder				
Create Rich Text Headings in Lightning App Builder				
See Fields in Compact Density When Configuring a Lightning Record Page				
Globalization				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Enable ICU Locale Formats (Release Update)		✓		
Conduct Business with New Zimbabwe Gold Currency	✓			
Review Updated Label Translations	✓			
Evaluate the Impact of the Latest ICU and JDK Locale Updates	✓			
General Setup				
Fix Formula Syntax Errors with Einstein for Formulas				✓
Add New Custom Fields to Dynamic Forms-Enabled Pages		✓		
Enforce View Roles and Role Hierarchy Permission When Editing Public List View Visibility (Release Update)			✓	
Register More API Specifications with Support for YAML		✓		
Access More External Data Types with the Custom Adapter for Salesforce Connect			✓	
See Required Fields at a Glance on Aura-Based Page Views		✓		
Get Improved Accessibility in List Views	✓			
Get Better Performance for List Views	✓			
Review Updated URLs for List Views	✓			
See Record Fields in Two Columns on Tablets		✓		
See Dynamic Forms-Enabled Lightning Page Information for Custom Fields		✓		
Rich Text Field Images No Longer Overflow Their Column Boundaries		✓		

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
Data Cloud Features Released by Month				
AI in Data Cloud				
Manage AI Models in Einstein Studio		✓		
Power Your Generative AI Using Anthropic Models with Prompt Builder		✓		
Power Your Generative AI with Google Gemini and Prompt Builder		✓		
Leverage Alerts to Evaluate the Quality of Your Predictive Model		✓		
Let Einstein Autoselect the Best Factors for Your Use Case		✓		
Evaluate Your Model Performance with Activity Metrics		✓		
Access Models Quicker with the Updated Einstein Studio Navigation		✓		
Einstein Studio Legacy Tab Is No Longer Available in Data Cloud		✓		
Data Cloud Einstein Lookalikes in Segmentation Is Being Retired			✓	
Focus on Relevant Attributes When Creating Einstein Segments			✓	
Get Optimized Segment Results with Einstein Data Prism			✓	
Create and Customize Retrievers in Einstein Studio			✓	
Edit a Data Graph				✓
Access Data from Amazon Redshift and Databricks with BYOL Data Federation	✓			
Ingest More Data into Data Cloud with New Third-Party Connectors (Beta)			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Query Data Graphs for Metadata and Data Using the Data Graphs APIs		✓		
Get Faster Segment Counts with Approximate Segment Population			✓	
Prioritize Campaigns with Waterfall Segments (Generally Available)	✓			
Create Segments with Fewer Clicks	✓			
Rapidly Publish Segments to Hyperscaler Targets		✓		
Define Segment Filters Based on Aggregate Values Across Multiple Levels (Pilot)	✓			
Optimize Campaigns by Ranking and Limiting the Segment Audience (Pilot)	✓			
Manage B2C Communications Using Capping Control (Pilot)	✓			
Use Segments in a Data Kit	✓			
Apply Filters to Contact Points and the Activation Membership (Generally Available)		✓		
Use More Objects for Copy Field Enrichments	✓			
Data Cloud Related List Enrichments Now Support Accounts	✓			
Enrich Most Objects in Your Org With Data Cloud Data	✓			
Enrich Data Actions Using Data Graphs		✓		
Run Batch Data Transforms at Custom Time Intervals	✓			
Enhance Row Security in Batch Data Transforms	✓			
Run Batch Data Transforms with No Downtime	✓			
Refresh Data More Frequently with Incremental Refresh in BYOL Data Federation	✓			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Edit an Output Node in a Batch Data Transform	✓			
Modify Streaming Data Transforms	✓			
Refresh a Streaming Data Transform	✓			
Improve Data Quality by Monitoring Problem Record Metrics	✓			
Bring Inventory Data into Data Cloud with the Omnichannel Inventory Connector		✓		
Customize Web Pages in Real Time				✓
Refine Access with Data Spaces Feature Permissions			✓	
Connect Unstructured Data in Data Cloud				
Enhance Your AI and Automation Strategies with Unstructured Data in Data Cloud		✓		
Use Vector Search in Generative AI, Automation, and Analytics Tools		✓		
Import data from the Adobe Marketo Engage connector to Data Cloud			✓	
Experience Faster Salesforce CRM Connector Refreshes				
Identify Your Salesforce CRM Orgs Using an Alias				
Use Identity Provider Authentication for S3 Connectors	✓			
Deploy Data Kit Components with Autolaunched Flows	✓			
Work with Data Cloud in a Sandbox Org (Beta)			✓	
Deploy Data Cloud Changes from a Sandbox to Production (Beta)			✓	
Improve Search Accuracy with Hybrid Search (Beta)		✓		
Cross Cloud Updates for Data Cloud				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Organize Segment Intelligence Data With Data Spaces		✓		
Optimize Monetary Data Management with the Currency Data Type				
Include a Currency Type in a Data Action		✓		
Transcribe and Index Audio and Video Files (Beta)			✓	
Add Context to Chunks with Prepend Fields			✓	
Supercharge Your AI Usage with Retrieval Augmented Generation (RAG)				

Deployment

Check out what's new in change sets.

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

Development

Whether you're using Lightning components, Visualforce, Apex, or 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
Lightning Components				
Get the Latest LWC Changes with LWC API Version 61.0				
Update Your Light DOM Components for Improved Slot Forwarding		✓		
Use Third-Party Web Components in LWC (Beta)		✓		
Navigate to a URL-Addressable Lightning Web Component		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Control Utilities Within the Utility Bar		✓		
Confirm Your Components Use Supported Design System Customizations		✓		
Be Aware of Base Lightning Component Internal DOM Structure Changes for Future Native Shadow Support		✓		
Class and Style Attributes Render with Extra Whitespaces		✓		
Lightning Web Security Enablement Rollout Postponed			✓	
API Distortion Changes in Lightning Web Security			✓	
Visualforce				
Update References to Visualforce Pages Served on Salesforce.com	✓			
Updated Default Behavior of Visualforce Section Header Components		✓		
Apex				
Use Cursors for Expanded SOQL Query Result Support (Beta)		✓		
Evaluate Dynamic Formulas in Apex (Beta)		✓		
Use SOQL in Apex with Data Cloud Objects		✓		
Consider Field- and Record-Level Access When Using Apex With Data Cloud Objects		✓		
Mock SOQL Tests for Data Cloud Objects		✓		
Support for Five-Level Parent-to-Child Relationship SOQL Queries in Apex		✓		
Make Invocable Actions Easier to Configure with New InvocableVariable Modifiers		✓		
IdeaExchange Delivered: Monitor Apex Scheduled Jobs More Efficiently		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Update the API Version of Abstract or Virtual Classes to Prevent Overriding Private Methods		✓		
IdeaExchange Delivered: Monitor Setup Methods Using ApexTestResult		✓		
View CronTrigger and Batch Job IDs in Improved Error Messages with Scheduled and Batch Apex		✓		
Ensure More Secure Compilation of Apex Classes		✓		
See Improved Logging When FOR UPDATE Locks Are Released		✓		
Resolve Unhandled Exceptions Faster with Additional Information in Apex Exception Emails		✓		
See Improved Behavior with Custom Exceptions		✓		
Support for Standard Fields in the getRelationshipOrder Method		✓		
API				
Update API Calls to Use Your My Domain Login URL		✓		
Update Records Using External IDs in REST API		✓		
View More Details in the Updated OpenAPI Spec sObjects (Beta)		✓		
Delete the Obsolete Salesforce API Only Systems Integrations User Profile		✓		
Benefit from Simplified Org Migration with Automatically Migrated Change Sets		✓		
Salesforce Platform API Versions 21.0 Through 30.0 Retirement (Release Update)	✓			
Packaging				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Use Second-Generation Managed Packaging to Build Data Cloud Apps		✓		
Quickly Iterate Package Development Using Async Validation		✓		
Shorten Package Install Time in Scratch Orgs by Skipping a Handler		✓		
Package External Client Apps In Second-Generation Managed Packages		✓		
Explore the Updated Documentation for Components in Managed Packages		✓		
Development Environments				
Data Mask				
Access Information About Specific Data Mask Job		✓		
Automate the Running of Data Mask Processes with Job Scheduler		✓		
Other Improvements to Salesforce Data Mask		✓		
Select Who Has Sandbox Access for Production Orgs with 60 or More Public Groups			✓	
Capture a Scratch Org's Configuration with Scratch Org Snapshots (Generally Available)			✓	
Increase Sandbox Security with Inactive User Freezing	✓			
New User Permission: Manage Dev Sandboxes			✓	
Test Data Cloud Features in a Sandbox (Beta)			✓	
Platform Development Tools				
Salesforce CLI		✓		
Salesforce Extensions for Visual Studio Code				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Get Started Faster on Salesforce Extensions for Visual Studio Code with the New Documentation Site		✓		
Code Builder				
Get Started Faster on Code Builder with the New Documentation Site		✓		
Einstein for Developers (Beta)				
Get Started Faster on Einstein for Developers with the New Documentation Site		✓		
Deploy Scalable Apps with Scale Center				
		✓		
Plan and Test with Scale Test				
				✓
Heroku				
Extend Your Customer 360 Experiences with Heroku		✓		
Salesforce Functions				
Salesforce Functions Is Being Retired				
				✓
AppExchange Partners				
Find Your Packages Faster in the AppExchange Partner Console	✓			
Improve Listing Accessibility with Alt Text In Carousel Images	✓			
Change Data Capture				
Receive Change Event Notifications for More Objects		✓		
Platform Events				
Add Real-Time Event Monitoring Events to a Custom Channel		✓		
Standard-Volume Platform Events Are Being Retired		✓		
Streaming API Versions 23.0 Through 36.0 Are Being Retired		✓		
Event Bus				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Manage Your Event Subscriptions with Pub/Sub API (Beta)		✓		
Keep the Pub/Sub API Publishing Stream Alive More Easily		✓		
Generate a Client Trace ID to Troubleshoot Non-Pub/Sub API Errors		✓		
Send Real-Time Event Monitoring Events to Amazon EventBridge with Event Relays		✓		
AWS Region Validation for Seamless Event Relay Execution		✓		

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
Einstein Features			✓	
Einstein Platform				
Einstein Bots				
Get the Information Your Team Needs with Required Responses			✓	
Answer Questions Easily with Knowledge and Generative AI			✓	
Run Flows in Bot User Context (Release Update)			✓	
View Standard Bot Reports in the Summer '24 Folder		✓		
New Invocable Actions for Einstein Bots		✓		
Einstein Copilot				
Handle More Use Cases More Consistently with Copilot Topics	✓			
The Mask Personally Identifiable Information (PII) Setting Has Been Removed	✓			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Give Feedback on Copilot Responses			✓	
See Records from Different Objects in Einstein Copilot's Responses			✓	
Clear Your Einstein Copilot Feed History	✓			
Give Users Control in Custom Einstein Copilot Actions	✓			
New and Changed Standard Copilot Topics and Actions			✓	
Einstein Data Library				
Ground Generative AI Responses with Einstein Data Library (Generally Available)	✓			
Einstein Development				
Connect Your Application to Large Language Models with Models API (Beta)		✓		
Einstein Studio in Data Cloud				
Einstein Trust Layer				
Get More Trust Layer Audit Dashboards and Reports				
Prompt Builder				
Create Flex Prompt Templates with Free Text Inputs		✓		
Get Prompt Responses in More Languages		✓		
Ground Your Prompts Automatically		✓		
Ground Your Prompt Templates with Retrieval Augmented Generation (RAG)		✓		
Use One Apex Class or Flow in Multiple Prompt Templates		✓		
View Harmful Content Notification in a Prompt Response		✓		
View Masking of Sensitive Data in Prompts		✓		
Work with Large Prompts		✓		
Retrieval Augmented Generation (RAG) in Data Cloud				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Supercharge Einstein Generative AI with Retrieval Augmented Generation (RAG)				
Vector Search and Hybrid Search in Data Cloud				
Other Changes				
Explore More Anthropic, Google, and OpenAI Models on the Einstein Platform			✓	
Geo-Aware LLM Request Routing Is Available in the Einstein Generative AI Platform	✓			
Get Optimized Einstein Responses with Einstein Data Prism				
Manage your Models on the Supported Models Page			✓	
OpenAI GPT 3.5 Turbo 16k and Azure OpenAI GPT 3.5 Turbo 16k Shutdown Date Approaching			✓	
Use the Starter Usage Type for Lower Cost Models	✓			
Use Supported Locales in the Einstein Generative AI Platform	✓			

Experience Cloud

Customization is key, and Experience Cloud is here to help you deliver. Integrate enhanced LWR sites with Data Cloud to gain deeper insights into site visitor interactions. Elevate your site with new styling features for forms and buttons, streamlined search options, and increased control over the layout and spacing of your LWR sites. Improve your visitor login experience with a new integration framework for headless login and guest user identity flows. Stay productive on the go with a collection of updates to the Mobile Publisher app.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Prepare Your LWR and Aura Sites for Design System Architecture Updates		✓		
Upgrade Your App with the Latest Features from Mobile Publisher for Experience Cloud		✓		
Aura and LWR Sites				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Integrate with Data Cloud to Harness Site Data (Generally Available)		✓		
Customize the Forms and Buttons on Your LWR Site with New Styling Features	✓			
Polish the Layout of Your LWR Site for Every Screen Size	✓			
Configure Search Results Layouts with Search Manager (Generally Available)		✓		
See Updates to Dependent Picklists While Editing Records in LWR Sites		✓		
Enable or Disable a Modernized Record Experience in Aura Sites in Your Sandbox Environment		✓		
Customize URLs for Accounts and Contacts to Improve SEO (Beta)		✓		
Customize Your Einstein AI-Generated Search Answer Settings		✓		
Help Partners Draft Sales Emails Quickly			✓	
Site Performance				
Improve the Performance and Scalability of LWR Sites with Experience Delivery (Pilot)				✓
Update References to Your Force.com Site URLs		✓		
Load Cached Visualforce Site Pages Faster	✓			
Security and Sharing				
Switch to a Single Domain Certificate for Your Salesforce Content Delivery Network			✓	
Salesforce Content Delivery Network Is Off by Default for Government Cloud Organizations			✓	
Refine Your Experience Cloud Site with New Customer Identity Features			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Try a More Flexible Integration Framework for Headless Identity Flows			✓	
Assign a New User Permission for Custom Domain Management		✓		
Track More Visualforce Site Changes		✓		

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
Field Service Einstein				
Get Started with Einstein for Field Service			✓	
Customize the Pre-Work Brief with Prompt Builder			✓	
Field Service Resource Management				
Enhanced Scheduling and Optimization				
Prevent Overlapping Optimization Runs			✓	
Adjust Service Appointments with Visiting Hours to Your Local Time Zone			✓	
Enhance Service Coverage and Boost Resource Productivity by Scheduling Across Multiple Time Zones	✓			
Benefit from Smoother Scheduling and Optimization Services for Overlapping Travel Time Scenarios	✓			
Get More Clarity and Resolve Issues Faster with Improved Error Messages	✓			
Trace Who Triggered an Optimization in the Optimization Request	✓			
Let Dispatchers Easily Set Criteria for Schedule Optimization			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Review the History of Scheduling and Optimization Requests with Activity Reports (Beta)			✓	
Access Optimization Request Files on Your Own (Beta)			✓	
Keep Important Appointments Scheduled During Optimization (Beta)			✓	
Create More Precise Travel Time Estimations by Including a Buffer (Beta)		✓		
Get More Accurate Scheduling Recommendations with Appointment Insights (Beta)			✓	
Work Capacity				
Reserve Workforce Capacity in a Service Territory	✓			
Work Capacity Limit Relaxation Renamed for Better Clarity to Limit Override	✓			
Share Work Capacity Data and Information with Partner Community Dispatchers via Experience Cloud			✓	
Field Service Operations				
Service Documents				
Personalize Service Documents with Embedded Expressions		✓		
Asset Management				
Minimize Downtime with Asset Health Score	✓			
Provision Entitlements with Precision	✓			
Link Assets to Multiple Accounts and Contacts	✓			
Migrate from Maintenance Plan Frequency Fields to Maintenance Work Rules (Release Update)			✓	
Field Service Intelligence				
Unlock Insights and Dashboards with Field Service Intelligence	✓			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Field Service Customer Engagement				
Improve Your Data Security with Automated Deletion of Visual Remote Assistant Video Recordings		✔		
Field Service Mobile				
Lightning Web Components				
Simplify Interactions with Data with Near Field Communication on iOS			✔	
Capture the Layout of a Space with Augmented Reality			✔	
Give Workers Access to Files with Content Libraries		✔		
Track Hours Offline With Time Sheets Priming		✔		
Stay on Track with the Field Service Widget (Generally Available)	✔			
Get Accurate Site Check-Ins and Check-Outs (Generally Available)			✔	
Choose How Mobile Workers Navigate to Destinations			✔	
Measure an Object with Augmented Reality	✔			
Create Leads and Opportunities from the Field			✔	
Upsell Your Business from the Field (Beta)			✔	
Optimize Data Retrieval with Cache-First (Beta)				✔

Industries

Industries solutions shape Salesforce to the needs of your business, reducing the need for you to customize things yourself. Consumer Goods Cloud streamlines delivery and distribution processes with Direct Store Delivery and Van Sales. Optimize service operations in the field with Field Service for Industries. Health Cloud integrates with Milliman Care Guidelines (MCG) to bring industry-standard assessments to Integrated Care Management. Loyalty Management gives marketing managers greater flexibility with Global Promotions Management. Manufacturing Cloud helps manufacturers streamline the process of recovering costs on defective parts from suppliers with Warranty Supplier Recovery. Salesforce for Education helps students plan their degrees better with Intelligent Degree Planning. We

also have plenty of changes for Automotive Cloud, Salesforce for Nonprofits, Public Sector Solutions, Industries common features, and much more.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Automotive Cloud				
Connected Services for Vehicles				
Usage-Based Licensing for Connected Vehicle Services			✓	
Remote Vehicle Actions			✓	
Actionable Telematics Event Management			✓	
Data Cloud for Automotive Experiences				
Evaluate Vehicle and Driver Performance Telematics Data			✓	
Monitor E-Vehicle Charger Telematics Data			✓	
Connect Data Cloud and Automotive Cloud Using Prebuilt Data Streams			✓	
Improve Sales and Service Experiences for Customers Using Calculated Insights			✓	
View Telematics Metrics On a Vehicle Page			✓	
Visualize Calculated Insights for a Vehicle			✓	
Visualize Calculated Insights for an Account			✓	
Supplier Recovery Claims				
Standardize Supplier Recovery Terms Using Contracts			✓	
Automatically Create Supplier Recovery Claims from Dealer Claims			✓	
Give Your Suppliers Visibility Into Claims			✓	
Manage Claims with an Improved Context Definition			✓	
Product Service Campaigns for Vehicle and Parts Recalls				
Manage Asset Recalls and Upgrades At Scale			✓	
Segment Assets for Product Service Campaigns Easily			✓	
Automotive Foundational Enhancements				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Help Partners and Customers Launch Actions from the Experience Cloud Site			✓	
Specify the External System Name and Identifier for Vehicles and Parts			✓	
Track Repair and Maintenance Costs for Assets Using Quotes			✓	
Communications Cloud				
Connected Assets				
Actionable Event Orchestration				
Create Sophisticated Orchestration Processes for Asset Events			✓	
Automatically Match Asset Events to Actionable Event Orchestration			✓	
Define Rules to Create and Update Records Based on Asset Events			✓	
Easily Find and Use Expression Sets for Event Orchestration			✓	
Data Cloud Metrics and Calculated Insights Visualization				
View Asset Metrics on a Record Page			✓	
View Asset Calculated Insights on Record Pages			✓	
Minimize Downtime with Asset Health Score	✓			
Consumer Goods Cloud				
Consolidate Your Customer Data with Data Cloud for Consumer Goods			✓	
Retail Execution				
Plan Tours and Start Tours Activities Efficiently			✓	
Get Meaningful Recommendations with Account Summarization (Beta)			✓	
Capture Store-Related Data Easily			✓	
Share Visit is Retiring			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
New and Changed Objects			✓	
Sync Management				
Centrally Administer Your Sync Experience			✓	
Expedite Sync Using Optimized Named Fetch Trees			✓	
Identify Sync Records in Logs Easily with Sync IDs			✓	
Process Simultaneous Sync Request Load Efficiently			✓	
Improve Support for Solving Sync Issues by Logging Extended Sync KPIs			✓	
Include CPU Calculation Time in APEX Calculation			✓	
New and Changed Objects in Consumer Goods Cloud Sync			✓	
Visual Studio Code Based Modeler				
Simplify Contract Customization with Keyword Suggestions			✓	
Add Validation Methods in A Few Quick Steps			✓	
Deep Link Additional Apps in Your Consumer Goods Cloud Offline Mobile App			✓	
Trade Promotion Management				
Retain Manually Entered KPI Values for Periods			✓	
Download Promotion Data Easily			✓	
Share Claim Data With Third-Party Systems			✓	
Execute Push Promotions Faster			✓	
Improve Promotion Effectiveness with Analytics Dashboards			✓	
Preview Your Processing Service			✓	
Manage Permission Sets Efficiently			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Other Changes in Consumer Goods Cloud			✓	
Energy and Utilities Cloud				
Asset Service Lifecycle Management				
Product Service Campaign				
Manage Mass Asset Recalls, Modifications, and Upgrades Easily			✓	
Segment Assets in Product Service Campaigns Swiftly			✓	
Work Order Estimation				
Estimate Field Service Work Before You Create Work Orders			✓	
Asset Coverage View				
Provision Entitlements with Precision	✓			
Financial Services Cloud				
Digital Lending				
Give Clients a Self-Serve Loan Application Process			✓	
Help Clients Apply for a Loan			✓	
Approve or Reject a Loan Application by Using Underwriter Console			✓	
New and Changed Invocable Actions			✓	
New Apex Namespace in Digital Lending				
New Metadata Types in Digital Lending			✓	
Digital Lending—India				
Get Digital Lending—India Up and Running with Ease		✓		
Increase Speed and Ease of Adoption with Digital Lending—India Sample App	✓			
Onboard Loan Applicants Faster with Guided Application Intake	✓			
Offer a Smooth Loan Application Review Experience	✓			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Reduce the Turnaround Time for a Loan Disbursal	✓			
Transaction Dispute Management				
Resolve Transaction Disputes Faster with Prebuilt Mastercom® Integration		✓		
Business Client Engagement				
Discover the Ultimate Owners of Your Business Clients			✓	
View Relationships of Your Business Clients			✓	
Rollup Definitions for Record Rollups				
Create Record Rollup Definitions More Easily			✓	
Integration Orchestration (Generally Available)				
Streamline Integration Callouts with Integration Orchestration		✓		
Visualize Integration Callouts and Manage Them Easily		✓		
Group Membership and Households				
Use Party Relationship Groups to Create Groups Easily and Efficiently			✓	
Visualize Groups or Households with Actionable Relationship Center			✓	
Household API Setup				
Aggregate and View Salesforce Records in your Financial Planning Tool by Using API			✓	
Data Cloud for Financial Services Cloud				
Visualize Insights into a Household and its Members		✓		
Calculate More Customer Insights		✓		
Capture Income and Expenses				
View Client Cash Flow Summary		✓		
Financial Account Management Standard Objects				
Deliver Excellent Banking Service with the Retail Banking Console App			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Streamline Communication and Foster Customer Success with the Wealth Management Console App			✓	
Manage Your Commercial Banking Activities Efficiently with the Commercial Banking Console App			✓	
Get Customer's Financial Account Information with Standard Objects		✓		
Add Flexibility to Financial Accounts in Service Processes with Standard Objects		✓		
Get Started Faster with Guided Setups				
Get Households Up and Running with Ease			✓	
Get Record Rollups Up and Running with Ease			✓	
Get Financial Accounts, Financial Account Parties, and Financial Account Transactions Up and Running with Ease			✓	
Watch Financial Services Cloud Videos		✓		
New and Changed Financial Services Cloud Object Fields				
New Connect REST API Resources			✓	
Health Cloud				
Einstein for Health Cloud				
Automate Assessment Generation With Einstein Generative AI			✓	
Home Health Enhancements				
Revolutionize Patient Care With Home Health			✓	
Optimize Home Visit Scheduling With Manual Resource Assignment			✓	
Provide Personalized Care by Recording Patient Preference Order			✓	
Streamline Dependent Home Visit Scheduling With a New Flow			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Deliver Effective Patient Care With Advanced Group Visit Capabilities			✓	
Elevate Scheduler Efficiency With an Improved User Interface			✓	
Expedite Your Home Health Setup			✓	
Integrated Care Management Enhancements				
Access MCG Assessments and Care Guidelines			✓	
Create Care Plans Using MCG Assessments			✓	
Administer Assessments Suggested from MCG Assessments			✓	
Track MCG Assessment History			✓	
Update Care Plans Using Care Plan Templates			✓	
Automatically Share Care Task Records			✓	
Group Benefits in Health Cloud				
Boost Sales Productivity with the Group Benefits App			✓	
Intelligent Appointment Management Enhancements				
Book a Series of Appointments with Multi-Step Scheduling			✓	
Reduce Friction in Managing Appointment Changes			✓	
Get Enhanced Guidance to Set Up Intelligent Appointment Management		✓		
Medication Management Updates				
Medication Management Add-On License is Deprecated	✓			
Patient Program Outcome Management (Pilot)				
Store Outcome Data in the Patient Program Outcome Management Data Model (Pilot)			✓	
Calculate Outcome Metrics Using Salesforce Flows (Pilot)			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Participant Management			✓	
Pharmacy Benefits Verification				
View a Comprehensive Summary of Patient's Member Plans			✓	
Raise Verification Requests for Pharmacy Benefits			✓	
Record Responses from Payers			✓	
Provider Network Management Enhancements				
Use Provider Network Management in an App		✓		
Use DocuSign to Collect Provider Signature on Applications			✓	
Enhance Security with reCAPTCHA	✓			
Provider Search Enhancements				
View More Relevant Details in Search Result Cards	✓			
Improve Provider Search Results with Precise Matching			✓	
Get More Control Over Provider Search Data			✓	
Get Enhanced Guidance to Set Up Provider Search			✓	
Optimize Patient Care by Using Segmentation Insights			✓	
Health Cloud Console				
View Events, Tasks, and More with the Health Cloud Console App			✓	
Health Cloud Managed Package				
End of Distribution for the Health Cloud Managed Package		✓		
Use Standard Relationship Objects in More Health Cloud Features			✓	
Health Cloud Admin Guide				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Find the Single Source of Truth for the Health Cloud Admin Guide	✔			
Health Cloud Has New and Changed Objects		✔		
MuleSoft Direct Integrations with Health Cloud			✔	
New Connect REST API Resources in Health Cloud		✔		
New and Changed Invocable Actions in Health Cloud		✔		
New Metadata Types in Health Cloud		✔		
Insurance				
Life Sciences Cloud				
Participant Management				
Discover Clinical Trials Easily with Criteria-Based Search and Filter			✔	
Evaluate Participant Eligibility With Prescreening Assessments			✔	
Simplify Application Process With Built-in Templates			✔	
Capture Informed Participant Consents with Flows			✔	
Patient Program Outcome Management (Pilot)				
Store Outcome Data in the Patient Program Outcome Management Data Model (Pilot)			✔	
Calculate Outcome Metrics Using Salesforce Flows (Pilot)			✔	
Pharmacy Benefits Verification				
View a Comprehensive Summary of Patient's Member Plans			✔	
Raise Verification Requests for Pharmacy Benefits			✔	
Record Responses from Payers			✔	
Life Sciences Cloud Has New Objects		✔		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
New Invocable Actions in Life Sciences Cloud			✓	
New Metadata Types in Life Sciences Cloud			✓	
Loyalty Management				
Global Promotions Management				
Add Multidimensional Promotion Rules for Nuanced Business Requirements	✓			
Refine Promotion Rule Eligibility Based on a Product's Attributes	✓			
Design Promotion Rules with No Eligibility Requirements			✓	
Control Who Can Create Promotions with Ease			✓	
Provide Uninterrupted Member Services with Negative Points Balance			✓	
Replicate Seasonal and Repetitive Promotions with Minimal Effort	✓			
Streamline Program Manager Onboarding			✓	
Increase Your Loyalty Program's Appeal by Partnering with More Brands	✓			
Quickly Find Vouchers and Badges When You Design Promotion Setup Rules	✓			
Watch Loyalty Management Videos	✓			
New and Changed Objects in Loyalty Management		✓		
New Metadata Types in Loyalty Management		✓		
Manufacturing Cloud				
Data Cloud Features for Manufacturing Cloud				
Harmonize Asset and Operator Performance Telematics Data			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Share Data Between Manufacturing Cloud and Data Cloud at Scale Using Data Streams			✓	
Make Data-Driven Decisions on Assets and Customer Revenue with Calculated Insights			✓	
Visualize Asset Telematics Data			✓	
View Multidimensional Metrics for an Asset			✓	
View Multidimensional Metrics for an Account			✓	
Warranty Supplier Recovery				
Establish Contract Terms for Supplier Cost Recovery		✓		
Efficiently Create and Edit Supplier Recovery Claims				
Manage Supplier Recovery Claims by Efficiently Using the Experience Cloud				
Product Service Campaign				
Manage Mass Asset Recalls, Services, and Upgrades Efficiently			✓	
Identify and Segment Assets in Product Service Campaigns Easily			✓	
Estimate Field Service Work and Quote Costs to Customers Easily				
Associate Any Sales Agreement with a Contract				
Watch Manufacturing Cloud Video				
Media Cloud				
Net Zero Cloud				
Insert Questions and Response Placeholders in Microsoft 365 Word to Design Document Templates for ESG Disclosures		✓		
Einstein for Net Zero Cloud				
Search for and Draft ESG Reports (Beta)		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Other Improvements for ESG Report Accuracy Assessment by Using Einstein Generative AI			✓	
Export Carbon Calculations for Audit	✓			
Track Value Changes in Key Objects and Fields			✓	
Simplify Energy Use Data Collection	✓			
Grant Energy Use Data Upload and Entry Permissions to Users	✓			
Other Improvements to Custom Fuel Framework	✓			
Other Improvements to Scope Allocation	✓			
New and Changed Objects for Net Zero Cloud	✓			
Metadata API		✓		
Public Sector Solutions				
Enable Constituents to File Social Insurance Claims			✓	
Tackle Care Barriers with Care Plans and Goals			✓	
Enhance Service Delivery Experience for Public Sector Providers			✓	
Efficiently Capture Complete Interaction Notes by Using a Guided Flow			✓	
Redetermine Benefit Eligibility When Constituents Recertify for Benefits			✓	
Share Performance Indicators and Outcome Results on an Experience Cloud Site			✓	
Help Employees Do More on the Employee Experience Cloud Site			✓	
IdeaExchange Delivered: Give Inspectors a Link to More Information About a Regulatory Code			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
IdeaExchange Delivered: Make Follow-Up Visits Easier for Inspectors by Relating Them to the Previous Visit			✓	
Set Up Service Excellence Capabilities More Easily			✓	
Improvement in Dynamic Assessments			✓	
Set Up Licensing and Permitting Flows with Out-of-the-Box Components			✓	
Keep Your Benefit Management Flows Up to Date with the Latest Fixes and Improvements			✓	
New and Changed Objects in Public Sector Solutions		✓		
Metadata API		✓		
Referral Marketing				
Design Reusable Promotion Templates Aligned with Your Business Goals	✓			
Make the Most of the Refreshed Referral Promotion Guided Flow	✓			
Save Time with the Revamped Promotion Email Templates	✓			
Knock Off the Hassle of Determining the Sender Email Address	✓			
Improve Referral Prediction Accuracy by Analyzing Additional Features	✓			
Track Advocate Count as a Promotion KPI	✓			
Reduce Customer Acquisition Costs by Running Referral Promotions for Your Members	✓			
Watch Referral Marketing Videos	✓			
New and Changed Objects in Referral Marketing		✓		
Salesforce Contracts				
Salesforce for Education				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Help Students Determine Their Steps to Graduation with Intelligent Degree Planning		✓		
Track Academic Advancement with Learner Progress		✓		
Compare and Connect Mentors with a Mentee		✓		
Migrate from Managed Packages to Education Cloud		✓		
Import Your Common App Data into Education Cloud		✓		
Get a Quick View of Admissions Item Status		✓		
Assign Appointment Resources Automatically and Efficiently		✓		
Draft Questions by Using Einstein for Intake Assessments		✓		
Use AI to Set Course and Program Expectations with Einstein Skills Generator		✓		
Use QR Codes to Facilitate Check-ins		✓		
View Learning Details in Learning Summary		✓		
Use Fundraising Updates for Advancement	✓			
Einstein for Fundraising (Beta)	✓			
New and Changed Objects in Education Cloud		✓		
Salesforce for Nonprofits				
Nonprofit Cloud				
Fundraising				
Program Management				
Nonprofit Cloud for Case Management			✓	
Nonprofit Cloud for Grantmaking			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Quickly Find Salesforce for Nonprofit Managed Package Release Information	✓			
Elevate Retirement	✓			
foundationConnect Retirement	✓			
Vlocity Contract Lifecycle Management				
Industries Common Features				
Action Launcher				
Provide Prompt Customer Service by Quickly Launching Aura Components	✓			
Experience Improved Clarity with the Renamed Out-of-the-Box Deployment Feature	✓			
Changed Object in Action Launcher		✓		
Actionable List Members				
Add or Remove Columns in Actionable List Members to View Relevant Information	✓			
Improve the Efficiency of List Creators with the Record Status Filter	✓			
Streamline the List Creator Workflow with Contextual OmniScripts on Bulk Action Panel	✓			
Save Time and Improve Efficiency with Bulk Action Plans	✓			
Business Rules Engine				
Replace and Delete Subexpressions in Expression Sets Easily	✓			
Map Subexpression Variables to Expression Set Resources Efficiently	✓			
Use Boolean Data Type in Expression Set Constants	✓			
Troubleshoot Large Expression Sets Easily	✓			
Change Decision Tables Used in Expression Sets Effortlessly	✓			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Easily Create Decision Tables by using Templates		✓		
Enhance your Decision Table Logic by using the Does Not Match and Contains Operators		✓		
Create Decision Tables that Support Large Number of Rows (Pilot)		✓		
Changed Business Rules Engine Objects		✓		
Context Service				
Automatically Map Context Definition to Standard Objects		✓		
Generate Input Mapping Easily for Context Definitions		✓		
Specify Context Mapping Intent to Use Different Mapping Types		✓		
Use Context Definitions as Mapping Data Source		✓		
New Objects in Context Service			✓	
Metadata API		✓		
Connect REST APIs				
Context Namespace			✓	
Criteria-Based Search and Filter				
Enrich the Search Experience on Experience Cloud Sites			✓	
Show Search Results in an Interactive Map			✓	
Help Users Refine Search Results with Sorting for Cards			✓	
Copy and Report On Search Results			✓	
Connect REST APIs				
Data Processing Engine				
Use a CSV File as a Data Source		✓		
Add Flexibility to Data Cloud Filter and Join Nodes with All Map Fields		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Support for Multiple Writeback Nodes with Data Cloud		✓		
Make Smarter Definitions With Formula Nodes for Data Cloud		✓		
Metadata API		✓		
Einstein Summary				
Efficiently Summarize the Information Stored in Object Records	✓			
Engagement (Beta)				
Efficiently Summarize a Customer Interaction (Beta)	✓			
Efficiently Summarize Up To Five Recent Customer Interactions (Beta)	✓			
Grantmaking				
Effortlessly Launch Complex Grant Applications			✓	
Measure the Impact and Success of Grants with Outcome Management			✓	
Securely Collaborate on Grantmaking Application Sections			✓	
Easily Add Grantmaking Permission Sets to Permission Set Groups			✓	
Quickly Delete Individual Applications	✓			
New and Changed Objects for Grantmaking		✓		
Industry Integration Solutions				
Efficiently Deploy Industry Integrations to CloudHub 2.0			✓	
Ensure Confidentiality of Parameter Values on Anypoint Platform			✓	
Intelligent Document Reader				
Optimize Data Extraction by Excluding Rows in Tabular Data				
Intelligent Form Reader				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Optimize Data Extraction by Excluding Rows in Tabular Data				
Interaction Summaries				
Efficiently Create and Manage Interaction Notes			✓	
New and Changed Objects in Interaction Summaries		✓		
List Builder for Data Cloud Segment				
Get Better Outreach Results by Suppressing Irrelevant Records	✓			
Changed Object in List Builder for Data Cloud Segment		✓		
Rollup Definitions for Record Rollups				
Work More Intuitively with Record Rollup Definitions UI			✓	
New Connect REST API Resource in Record Rollup Definitions				
Scoring Framework				
Efficiently Debug Analytics App Installation Failures with Saved Assets		✓		
Service Process Studio				
Control Access to Service Processes by Listing Them as Products		✓		
Watch the Service Process Studio Video		✓		
Stage Management				
Automate and Manage Business Process Stage Transitions		✓		
Timeline				
Quickly Deliver Better Customer Insights to Contact Center Agents (CCAs) With Data Graph	✓			
Provide Personalized Support to Customers with Summaries on Timeline	✓			

Marketing

Salesforce offers three marketing products: Account Engagement (formerly known as Pardot), Engagement (formerly known as Marketing Cloud), and Marketing Cloud Growth edition. Unified Messaging tools support Marketing Cloud Growth and other Salesforce apps.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Einstein Personalization				
Provide Personalized Experiences With Einstein Personalization		✔		
Marketing Cloud Account Engagement				
Send Operational Emails to Opted-Out Prospects Directly from Engagement Studio		✔		
Copy Images to a Salesforce CMS Workspace		✔		
View Alerts in the Optimizer		✔		
Account Engagement API: New and Changed Items		✔		
Engage for Gmail Chrome Extension Is Being Retired		✔		
Marketing Cloud Engagement				
App, Setup, and Security				
Quickly Deploy a Retail Onboarding Journey with Industry Solutions		✔		
Get More Subscriber Information with Package Manager Interactive Email Industry Solutions		✔		
Visualize Automation History		✔		
Copy Large Datasets Efficiently in Automation Studio		✔		
Fine-Tune Permissions for SFTP Users		✔		
Plan Automations Based on Start-Time Scheduling Recommendations		✔		
Repeat Automations More Frequently		✔		
Get More Insights About Your Automation Health and History		✔		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Secure Event Notification Service Connections with OAuth 2.0 with Assertion Authentication		✓		
Monitor Event Notification Service Callbacks Using Alert Manager		✓		
Social Studio Is Being Retired	✓			
Cross-Cloud				
Prevent Email Sends with Empty Fields in Distributed Marketing	✓			
Process Builder Is Retiring for Marketing Cloud Connect	✓			
Data Management				
Maximum Length of a Data Extension Field Has Changed	✓			
Engagement Data Retention and Access Policy Is Changing	✓			
Developers				
AMPscript RetrieveSalesforceObjects() Function Rowset Limit		✓		
Compress Journey History Data Downloads		✓		
Manage Data Extensions with REST API		✓		
Release Multiple Contacts from Journey Waits Simultaneously		✓		
Use AMPscript to Encode JWTs with RSA Signatures		✓		
Journeys				
Give Journeys a High System Priority	✓			
Get Useful Journey Information on the Canvas	✓			
Send a Larger Volume of Emails with High-Throughput Sending	✓			
Specify Inbox Message Send Dates in Journey Builder	✓			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Improve Journey Performance with Recommendations	✓			
Messaging				
Shorten SMS Links in MobileConnect and Journey Builder	✓			
Secure a Custom Domain for SMS Link Shortening in MobileConnect				✓
Simplify SMS Messaging by Using DLT Templates in MobileConnect	✓			
Add MobilePush to Your Flutter Mobile Apps		✓		
Test and Troubleshoot Your App Configuration Using the MobilePush Diagnostic Tool		✓		
MobilePush Developer Documentation Has Been Updated		✓		
Enhance Message Engagement Tracking with More MobilePush Events		✓		
Stay Compliant with Apple Privacy Regulations with the New Privacy Manifest		✓		
Adopt the New Authentication Pattern for Android Applications in MobilePush			✓	
Reuse Template Message Names Across Your WhatsApp Business Accounts	✓			
Marketing Cloud Intelligence				
Get Customer Behavior Information with the LinkedIn Company Page Connector	✓			
Leverage More Data from Google Display & Video 360	✓			
Easily Integrate Marketing Cloud Intelligence with Google Search Ads 360	✓			
Drive Campaign Performance with Performance Max Data in Bing Ads	✓			
Marketing Cloud Personalization				
Track More Marketing Cloud Personalization Product Metrics		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Update Your Firebase Cloud Messaging API Certificate for Mobile Push		✓		
Archived Release Notes	✓			
Marketing Cloud Growth				
Work More Efficiently with New Access Points on Campaigns	✓			
Get More Done with Updated Flow Functionality	✓			
Build a Static List Quickly with Campaign Members	✓			
Track and Use Data to Inform Your Strategy	✓			
Streamline Tasks with Content Creation Enhancements	✓			
Make Your Landing Pages More Accessible and Secure	✓			
Manage Your SMS Request and Flow Experience	✓			
Save Time with Grounded Einstein AI Tools	✓			
Other Changes in Marketing Cloud Growth		✓		
Unified Messaging				
Merge Marketing and Service by Migrating from WhatsApp-First Business Messaging to Unified Messaging				
Transfer a WhatsApp Conversation from Marketing Cloud Engagement to Service Cloud with Journey Builder				
View Analytics for the WhatsApp Session Transfer Activity in Journey Builder				
Suppress Promotional WhatsApp Messages During Support Interactions with Journey Builder				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Expand the Data Available for Your WhatsApp Engagement Queries in Unified Messaging				
Configure Customer Consent for Unified WhatsApp Messages in Flow	✓			

Mobile

Configure offline landing pages without code using Mobile Builder for Salesforce Mobile App, which is now generally available. Improve your Mobile Publisher app with new security features and prepare your app for new notification and device operating system requirements. Submit the required Firebase information for push notifications on Android mobile connected apps.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Salesforce Mobile App				
Everything That's New in the Salesforce Mobile App				
Hide Global Search for Specific Lightning Apps		✓		
Configure Offline App Landing Pages Easily with Mobile Builder (Generally Available)			✓	
Keep Working While Your Records Download with Background Priming (Beta)				✓
See Only Actions You Can Use in Mobile Builder		✓		
Access the Recent Activity Timeline on the Salesforce Mobile App with Copilot Enabled	✓			
Message Customers in the Salesforce Mobile App (Beta)			✓	
Mobile Publisher				
Submit Your Mobile Publisher Android App's Required Firebase Information Before June	✓			
Mobile Publisher Android Apps with Managed Public Distribution Are No Longer Updated	✓			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Experience Cloud Apps Now Require Android 8 or iOS 16 and Later	✓			
Set Up Opt-In Biometric Login for Fast and Secure Experience Cloud App Logins (Beta)	✓			
Configure How Your Experience Cloud App Responds to Security Threats	✓			
Binary Upload Is the Default Distribution Method for New Mobile Publisher Apps	✓			
Add Links to an Experience Cloud iOS App's Login Page	✓			
Set the Default Method for How Your Experience Cloud App Opens External URLs (Generally Available)	✓			
Simplify Site Navigation on Mobile Publisher for LWR Sites (Beta)		✓		
Privacy Manifests Are Now Generated for Experience Cloud iOS Apps	✓			
General				
Update Your Android Mobile Connected App with Firebase Information Required for Push Notifications				

OmniStudio

In Summer '24, OmniStudio (when the Managed Package Runtime setting is disabled) supports features from OmniStudio for Vlocity, including filling address fields in omniscritps with Google Map data, using Salesforce private connect for HTTP actions in integration procedures, and choosing whether to merge entries within a list in an integration procedure list action. Also, DataRaptor is now Omnistudio Data Mapper. For Winter '25 upgrades, disable New Order Save Behavior. To prepare for future releases, remove organization and profile standard objects from data mappers, remove OmniStudio components with unlocked packages, and check the impact of the date change in the ADDDAY function return.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Easily and Accurately Complete Address Fields		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Make Secure HTTP Outbound Calls to AWS VPC		✓		
Remove Duplicates Within a List When Merging Lists		✓		
OmniStudio DataRaptor Has a New Name		✓		
Configure New Order Save Behavior During Upgrade		✓		
Remove Organization and Profile Standard Objects from Data Mappers Used by Customer Portal Users		✓		
Change in the ADDDAY Function Output				
OmniStudio Minor Releases				✓

Revenue

Automate and scale your revenue operations with a robust portfolio of Revenue Cloud products. Use Revenue Lifecycle Management to empower your organization's sales and revenue management processes. Salesforce Billing offers efficient resolutions to all invoice processing issues.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Revenue Lifecycle Management				
Revenue Lifecycle Management Videos	✓			
Product Catalog Management				
Use Dynamic Options to Add All Products Based On a Product Classification to a Product Bundle		✓		
Maximize Product Reach with Translated Product and Product Category Data		✓		
Accurately Represent Monetary Values and Percentages in Product Attributes		✓		
Alter Product Attribute Values Through Slider Controls		✓		
Personalize Product Catalog Management Objects with Custom Fields		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Other Changes in Product Catalog Management		✓		
Product Discovery			✓	
New and Changed Objects in Product Catalog Management			✓	
Connect REST APIs			✓	
Salesforce Pricing				
Accurately Derive Prices from Products and Assets Using Salesforce Pricing			✓	
Automatically Populate Output Variables for Pricing Elements			✓	
Easily Update Context Tags			✓	
Enhance Pricing Data Security			✓	
Tailor Pricing Discounts for Your Business Using Contract-Based Pricing			✓	
Track Pricing Data Using Event Log Files			✓	
Monitor Your Pricing Data From the Operations Console			✓	
Comprehensively Track Product Cost by Using Cost Books			✓	
Search for Any Price Book with the Redesigned Price Book Component			✓	
New Objects in Salesforce Pricing			✓	
Connect REST APIs			✓	
New Metadata Type			✓	
Product Configurator				
Increase Productivity with Actionable Configuration Rules			✓	
Create Flexible and Dynamic Sales Packages	✓			
Enhance Product Configuration with Additional Data Types	✓			
Increase Service Adaptability With Custom Field and Field Mapping Support	✓			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
New and Changed Objects for Product Configurator	✓			
Connect REST APIs			✓	
Quote and Order Capture				
Transaction Line Editor			✓	
Extend Revenue Lifecycle Management With Custom Field Support			✓	
Customize Prices for Different Types of Transactions			✓	
Craft Professional Quote Documents with Document Builder			✓	
Get Better Cost Estimates by Including Tax Information on Orders			✓	
Easily Submit Orders for Fulfillment			✓	
New and Changed Objects in Quote and Order Capture			✓	
New Invocable Action in Quote and Order Capture			✓	
New Metadata Type in Quote and Order Capture			✓	
Asset Lifecycle				
Assetize Orders Flow	✓			
Use Contract Pricing to Apply Prices and Discounts	✓			
Create Contract Prices and Discounts Using a Flow	✓			
Visualize Your Quote and Order Changes	✓			
Asset Conversion Tool for Transitioning from Subscription Management to Revenue Lifecycle Management	✓			
Customer Community and Customer Community Plus Support for Asset Lifecycle	✓			
Managed Asset Viewer	✓			
New Object in Asset Lifecycle			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Dynamic Revenue Orchestrator (Generally Available)				
Enable Dynamic Revenue Orchestrator for Your Org		✓		
Set Up Permissions and Licenses		✓		
See Your Fulfillment at a Glance from the Home Page		✓		
Define How Order Line Items Decompose		✓		
Design Orchestration Graphically		✓		
Configure Mapping for Fields and Attributes		✓		
Monitor Decomposition During Fulfillment		✓		
View Fulfillment While it Happens		✓		
Keep Track of Items in Jeopardy		✓		
Manage Fallout		✓		
New Objects in Dynamic Revenue Orchestrator			✓	
New Metadata Type in Dynamic Revenue Orchestrator			✓	
New Invocable Action in Dynamic Revenue Orchestrator			✓	
Salesforce Billing				
Improved Clean Up Process for Invoice Runs			✓	
New Metadata Type			✓	
Salesforce Subscription Management			✓	

Sales

Boost your sales teams' results with new features across Sales Cloud. Sales rep's get a boost to their productivity with standard and custom list view actions in the Account, Contact, and Lead Intelligence views. Use Generative Conversation Insights to create custom insights for video calls and get answers to things such as customer sentiment or deal terms. Sales managers have more flexibility in how they view forecasts. Enablement has an improved test and deploy experience for sales programs. And in Salesforce Maps, users experience better performance when plotting for high-volume data.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Einstein for Sales				
Draft Personalized Sales Emails with Einstein			✓	
Control Whether Users Can Enter Their Own Sales Email Prompt Instructions			✓	
Einstein Automated Contacts Is Being Retired in February 2025			✓	
Get Better Performance for Activity 360 Reporting			✓	
Einstein Copilot for Sales				
Accomplish More with Sales Copilot Topics	✓			
Improve the Convenience of Setting Up Meeting Requests			✓	
Relationship Selling				
Visualize Key Contacts on the Buyer Relationship Map	✓			
Add Company and Buyer Information to Contacts Automatically			✓	
Sales Foundations				
Contacts				
Create Contacts Automatically from Email and Calendar Interactions			✓	
Enhance Your Contact Information Automatically			✓	
Accessibility Enhanced in Contact Suggestions			✓	
Activities				
Return to Your To Do List Exactly as You Left It	✓			
Organize and Find Records Easily with Personal Labels	✓			
Grant Access to the Label Object In Custom Profiles To Continue Using To Do List Labels (Release Update)	✓			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
See More Valuable Information in Seller Home	✓			
IdeaExchange Delivered: Save Time with More Actions in the Intelligence Views	✓			
Einstein Conversation Insights				
Configure Custom Insights with Generative Conversation Insights			✓	
Use Einstein Conversation Insights with Single User Meetings	✓			
Share Edit Access for Record Collections with Other Users	✓			
Access More Dashboard Improvements	✓			
Sales Engagement				
Use Screen Flows as Cadence Steps in Cadence Builder 2.0	✓			
Create More Customized Sales Playbooks in Cadence Builder 2.0	✓			
Save Time by Creating Email Templates with Cadences	✓			
Easily Organize Cadence Builder 2.0 Cadences	✓			
Cadence Builder Classic Is Being Retired	✓			
Revenue Intelligence				
Navigate Revenue Insights Dashboards More Easily	✓			
Use Custom Fiscal Forecasts in Revenue Insights	✓			
Increase Your Deal Potential with Lead Data in Einstein Account Management	✓			
Access Your Revenue Insights Resources in One Place	✓			
Get Your Revenue Data Even Faster	✓			
Monitor Your Revenue Insights Installations and Upgrades	✓			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Collaborative Forecasts				
View Forecasts Grouped How It Makes Sense to You			✔	
Further Customize the Forecast Guidance You Receive in Copilot			✔	
Pipeline Inspection				
Save Time with More Actions in Pipeline Inspection	✔			
Identify Potentially Risky Contacts on Deals	✔			
Sales Programs and Partner Tracks with Enablement				
Provide Users with Coaching-Inspired Feedback Driven by Einstein Generative AI			✔	
Make Your Enablement Goals More Effective with Advanced Milestone Options		✔		
Get Transparency on Your Goal Progress with Itemized Progress Details	✔			
Help Users Discover and Complete Enablement Program Goals on Time		✔		
Develop, Test, and Deploy Enablement Programs and Measures More Easily		✔		
Tailor Your Enablement Programs to Your Company's Preferred Content System - Developer Preview		✔		
Other Changes in Enablement		✔		
Partner Relationship Management				
Help Partners Send Personalized Sales Emails Fast			✔	
Sales Performance Management				
Salesforce Maps and Salesforce Maps Advanced				
Get More from Salesforce Maps with an Enhanced User Experience			✔	
Changes Afoot for Custom Data Sources			✔	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Sales Planning				
Data Sources Management	✓			
Segmentation	✓			
Territory Planning				
Quota Planning	✓			
Limited Availability of Original Sales Planning	✓			
Sales Territories (Formerly Enterprise Territory Management)				
Enterprise Territory Management Is Now Sales Territories	✓			
Compensate Reps Based on Effective Territory Coverage Dates	✓			
Email, Calendar, and Integrations				
Einstein Activity Capture				
Understand Downloaded User Connection Reports Quickly		✓		
Outlook and Gmail Integration				
Enter Generative AI Instructions to Create Sales Emails in Email Integrations			✓	
Log Emails and Events More Intuitively	✓			
Salesforce Inbox (Retired)				
Inbox Mobile Was Retired		✓		
Salesforce for Outlook (Retiring)				
Salesforce for Outlook Is Now Being Retired in December 2027		✓		
Sales Cloud Everywhere				
See the Fields You Want in Sales Cloud Everywhere			✓	
Focus on the Right Records and Personalize Your Workspace	✓			
Other Changes in the Sales Cloud				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Enable New Order Save Behavior (Release Update)			✓	
Focus More Easily with the Latest Visual Refresh	✓			

Salesforce CMS

Clone any content type and its variants, add an API name when you create an enhanced CMS workspace and content, and work with CMS content previews.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Save Time with Content Record Cloning in Your Enhanced CMS Workspace		✓		
Preview Custom Content Types in Enhanced CMS Workspaces		✓		
Preview CMS Content as a Guest or Authenticated User		✓		
Secure Linked Sources in Salesforce CMS Content with Trusted URLs		✓		
Add an API Name to New Enhanced CMS Workspaces and Content		✓		

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
Flow Integration			✓	
Flow Builder Updates				
Let Einstein Build a Draft Flow for You (Beta)		✓		
Screen Flow Updates				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
IdeaExchange Delivered: Collect User Input to Build a List of Records from a Screen (Generally Available)		✓		
IdeaExchange Delivered: Empower Users to Fill in Addresses More Quickly with the New Search Field in the Address Screen Component		✓		
IdeaExchange Delivered: Require User Input in the Address Screen Component		✓		
Update Choices on a Screen in Real Time with Reactive Collection Choice Sets		✓		
Troubleshoot Screen Flows Faster with More Detailed Error Messages		✓		
Restrict User Input on Screen Components with the Disabled and Read Only Fields				
Update Records Using the State and Country Codes Selected in Address Screen Components		✓		
Run and Use the Results of an Autolaunched Flow on the Same Screen with the New Action Button Component (Beta)		✓		
Other Improvements in Screen Flow Components		✓		
User Experience Updates				
Find the Type of Automation to Build with Ease		✓		
View Your Elements by Label in the Flow Builder Toolbox		✓		
Build Flows More Easily with Auto-Generated Element Names		✓		
Find and Select Flow Resources More Easily in More Elements		✓		
Use the Enhanced Action and Subflow Panel in Flow Builder		✓		
Transform Your Data in Flows (Generally Available)		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Configure Conditions More Easily with Is Blank and Is Empty Operators in Flows		✓		
Check for Duplicates Before Creating Records in a Flow		✓		
Reuse Prompt Flows to Boost Efficiency			✓	
Flow Marketing Cloud				
End a Flow for a User at Any Point with Exit Rules		✓		
Wait for Specific Link Clicks with the Wait Until Event Element		✓		
Access Data Graph Attributes in Your Campaign Flows		✓		
View Detailed Flow Execution Data		✓		
Debug Segment-Triggered Flows		✓		
Package Segment and Form-Triggered Flow Templates		✓		
Flow Debugging				
Run Tests for Data Cloud-Triggered Flows		✓		
Debug Scheduled Flows More Successfully		✓		
Flow Runtime				
Flow and Process Run-Time Changes in API Version 61.0		✓		
Flow Management				
Manage Your Flows More Efficiently with the Automation Lightning App			✓	
Fine-Tune Access to Elements in Flow Builder			✓	
Have Unlimited Paused and Waiting Flows		✓		
Organize Your Flows Based on Categories and Subcategories That You Define		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Flow Actions				
Lock and Unlock Records with an Action		✔		
Use the New Toggle for Flow Action Inputs with Explicit Default Values		✔		
Configure a Secure Connection with MuleSoft in Setup (Generally Available)			✔	
Use Threading Tokens in Emails		✔		
Flow and Process Release Updates				
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)		✔		
Improve Scheduled Flow Performance with Updated Limits		✔		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Sort Apex Batch Action Results by Request Order (Release Update)			✓	
Enforce Permission Requirements Defined on Built-In Apex Classes Used as Inputs (Release Update)			✓	
Flow Orchestration				
Suspend and Resume an Orchestration		✓		
Resume a Failed Orchestration		✓		
Select the Orchestration Work Item to Complete		✓		
Use Omni-Channel Routing with Work Items		✓		
Configure Conditions More Easily with the Is Blank Operator in Orchestrations		✓		
Other Improvements		✓		

Security, Identity, and Privacy

External Client App Manager, OAuth 2.0 token exchange handlers, and Event Log File Browser are each now available in Setup. Also, external client apps now support a bunch of new OAuth flows. Give users access to manage custom domains with a new, more targeted user permission. Create uninterrupted user experiences across Salesforce and custom interfaces with the new Single-Access UI Bridge API. Access your Data Cloud encryption policy status from the Security Center Encryption Policy metric. Scratch orgs on Salesforce Edge Network use partitioned domains. And Android mobile connected apps now require the Admin SDK private key and project ID from a Google Firebase project.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Salesforce Backup				
Set a Custom Backup Schedule				
Get More Information from Backup and Restore Logs			✓	
Add Read-Only Objects to Your Backup Policy			✓	
Domains				
Update References to Your Previous Salesforce Domains		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Identify Redirections for Your Instanced My Domain Hostnames			✓	
Grant Specific Permission to Manage Custom Domains		✓		
Maximize Availability with Partitioned Domains in More Orgs	✓			
Identity and Access Management				
Customize SMS One-Time Password Delivery for Experience Cloud Sites (Beta)				✓
Brand the Welcome Email for Passwordless Registration		✓		
Create External Client Apps While Maintaining Security and Defined User Roles			✓	
Use More OAuth Features with External Client Apps			✓	
Integrate Custom App Experiences with the Salesforce UI			✓	
Create Token Exchange Handlers More Easily		✓		
Migrate to a Multiple-Configuration SAML Framework (Release Update)			✓	
Enter New Firebase Information Required for Android Push Notifications				
Use REST API for Access to External Client App OAuth Consumer Credentials (Release Update)			✓	
Verify Email Addresses to Meet the Email Verification Requirement		✓		
Stay on Top of MFA Compliance		✓		
Forced Login is Permanently Disabled in Winter '25		✓		
Identify the Origin IP Address for Logins with One or More Proxies			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Password Reset Login Subtype Label Is Changed		✓		
Enable Embedded Login			✓	
Take Advantage of Apex Enhancements for Processing JSON Web Tokens (JWTs)			✓	
Use the Token Exchange Flow with More Identity Providers		✓		
Simultaneous Token Requests Are Blocked During the Refresh Token Flow		✓		
Users Must Approve Access Every Time They Trigger the Device Flow		✓		
Refresh Token Rotation Now Works As Expected for Instances on Salesforce's First-Party Infrastructure		✓		
Privacy Center				
Retain Data with Privacy Center		✓		
UI Text and Functionality Improvements in Privacy Center		✓		
Permission Requirements for the Consent Event Stream Are Enforced				
Salesforce Shield				
Data Detect				
Einstein Data Detect Is Now Data Detect			✓	
Event Monitoring				
Query Low-Latency Event Data with Event Log Objects (Beta)			✓	
Access and Download Event Log File Data with the Event Log File Browser (Generally Available)			✓	
Download Up to 1 Year of Event Log Files			✓	
Track Network Performance Metrics			✓	
Identify Instanced Hostname Redirections			✓	
Track Pricing Data Using Event Log Files			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Field Audit Trail				
Audit Net Zero Cloud Field Changes			✓	
Shield Platform Encryption				
Encrypt Search Index Keys with Manageable Root Keys				
Encrypt Grantmaking Compliant Data Sharing Comments			✓	
See Fewer Encryption Statistics and Sync Timeouts			✓	
Access the Bring Your Own Key Pages with Assistive Technologies			✓	
Encrypt Application Form Seller Item Fields			✓	
Encrypt Party Income and Party Expense Fields			✓	
Encrypt Party Financial Liability, Party Financial Asset, and Party Financial Asset Lien Fields			✓	
Security Center				
Create Custom Metrics in Security Center (Beta)		✓		
View Pertinent Data with an Enhanced Security Center Dashboard Page		✓		
View Your Data Cloud Encryption Policy Status from the Security Center Encryption Policy Metric		✓		
View Fields That Are Encrypted Under Your Shield Platform Encryption Policy		✓		
Other Changes				
Allow Only Trusted Cross-Org Redirections (Release Update)			✓	
Adopt Updated Content Security Policy (CSP) Directives (Release Update)			✓	
Review and Resolve Blocked External Redirections		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
IdeaExchange Delivered: Limit Who Receives Notifications About Certificate Expiration			✓	
Control Which HTTP Status Codes Refresh Access Tokens for Named Credentials			✓	
Confirm Access to External Systems When Named Credentials Use the OAuth 2.0 Browser Flow	✓			
Create 3072-Bit Sized Certificates			✓	
Audit More Changes to Salesforce Sites and Visualforce Sites		✓		
Enjoy Faster Load Times for Cached Salesforce Site Pages	✓			
The BrowserId_sec Cookie Was Removed	✓			
Visualforce Section Header Components Are Secure by Default		✓		

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
Discover Service Capabilities with My Service Journey (Beta)	✓			
Einstein for Service				
Einstein Conversation Mining				
Track Key Trends and Top Contact Reasons Across More Channels		✓		
Einstein for Feedback Management				
Get Insightful Perspectives from Summaries of Survey Responses	✓			
Get Deeper Insights from Survey Responses				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Einstein Work Summaries				
Catch Up with Midconversation Summaries in Five More Languages	✓			
Catch Up Quickly On Emails with Einstein Work Summaries for Email (Generally Available)	✓			
Customize Your Work Summaries in Copilot (Generally Available)	✓			
Use Einstein Work Summaries in Additional Languages	✓			
Service Intelligence				
Get Your Service Intelligence Data Even Faster			✓	
Monitor Your Service Intelligence Installations and Upgrades			✓	
Access Your Service Intelligence Resources in One Place			✓	
Help Agents Predict Time to Resolve Cases			✓	
View Contact Center Metrics on Enhanced Dashboards			✓	
Simplify Service Intelligence Permission Sets		✓		
Apply Additional Service Assets in Data Cloud			✓	
Service Catalog				
Run Catalog Items for Contacts in Service Console		✓		
Make Catalog Items Available On External Sites with Lightning Out			✓	
Provide Guest User Access to Service Catalog			✓	
Integrate Service Catalog with Knowledge			✓	
Einstein for Service Catalog (Beta)				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Drive Case Resolution in Service Catalog with AI (Beta)			✓	
Share Catalog Item Links to Customers with Einstein Copilot (Beta)			✓	
Channels				
Email				
Transition to the Lightning Editor for Email Composers in Email-to-Case (Generally Available) (Release Update)			✓	
Disable Ref ID and Transition to New Email Threading Behavior (Release Update)			✓	
Catch Up On Emails Quickly with Einstein Work Summaries for Email (Generally Available)	✓			
Enjoy Improved Threading for Emails Sent by Flows	✓			
Use Threading Tokens with More Objects	✓			
Threading Tokens Are Exempt From Salesforce Org Storage Policy				
Manage Visibility for Your Email Routing Address		✓		
Messaging				
Merge Marketing and Service by Migrating from Enhanced WhatsApp to Unified Messaging		✓		
Message Your Customers from the Salesforce Mobile App			✓	
Say Goodbye to Standard WhatsApp Channels			✓	
Upgrade SMS and Facebook Messenger Channels from Standard to Enhanced		✓		
Analyze Conversation Transcripts in Data Cloud	✓			
Block Sensitive Data in Enhanced Messaging, Messaging for In-App and Web, and Voice Transcripts	✓			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Use Status-Based Capacity with Messaging (Beta)		✓		
Register SMS Long Codes in Setup		✓		
Create a Custom UI Solution for Messaging for In-App and Web (Beta)		✓		
Messaging Components			✓	
Agent Messaging Experience	✓			
Track Who Ends Enhanced Messaging Sessions	✓			
Activate or Deactivate Sensitive Data Rules from the Rules List View	✓			
Einstein Conversation Mining is Now Available in Messaging for In-App and Web			✓	
Access to Sensitive Data Rules is Restricted to Admins	✓			
Route Data to Objects in Partner Messaging (Beta)			✓	
Set a More Informative Channel Type in Partner Messaging (Beta)		✓		
Customize the Partner Messaging Channel Setup Experience Using Icons (Beta)	✓			
The Minimize Chat Window Button Is Relocated in Messaging for Web	✓			
Messaging for Web Development			✓	
Send Automated Notifications in Partner Messaging Channels (Beta)		✓		
Bring Your Own Channel for Messaging (Generally Available)			✓	
Voice				
Reassign Agents to Queues on the Fly			✓	
Get Midconversation Summaries for Voice in Five More Languages	✓			
Protect Sensitive Data by Masking Customer Phone Numbers		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Identify and Backfill Missing Call Transcripts in Bulk		✓		
Take Calls from Preferred Audio Devices	✓			
Security Increased for Authenticating Users in Amazon Connect with SSO			✓	
Resolve Common Status Conflicts Between Omni-Channel and Amazon Connect		✓		
Toggle Between Callers and Put Other Agents on Hold in Multi-Party Calls	✓			
Troubleshoot Failures During Amazon Contact Center Creation			✓	
Customize When to the Apply Sales Engagement Automatic Task Creation Feature		✓		
Use an Apex-Defined Variable for All Intelligence Signal Types (Release Update)			✓	
Pass the Conversation Intelligence Rule Name as Input to a Flow (Release Update)			✓	
Show an Accurate Call-Recording State in Omni-Channel			✓	
Control the Enhanced Conversation Component's Height in the Voice Call Record Page		✓		
Disable CTR Sync for Voice Call Records		✓		
Get the Latest Enhancements for Your Amazon Connect Contact			✓	
Account for Latency Between Omni-Channel and Amazon Connect when Rerouting Calls	✓			
Social Media				
Social Customer Service Starter Pack Is Being Retired		✓		
Chat				
Legacy Chat Is Being Retired				✓
Channel Tools				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
The Search Individual Flow Action Is Now Generally Available			✓	
Knowledge				
Unify Knowledge from Various Sources in Salesforce (Generally Available)			✓	
Turn On Lightning Article Editor and Article Personalization for Knowledge (Release Update)			✓	
Run the Lightning Knowledge Migration Tool			✓	
Routing				
IdeaExchange Delivered: Support Customers While on the Go with Omni-Channel for Mobile (Beta)		✓		
Stay Logged In to Omni-Channel When Using Multiple Tabs		✓		
Route Orchestration Work Items with Omni-Channel		✓		
Pause Messaging Sessions with Omni-Channel Status-Based Capacity (Beta)		✓		
Enhance Routing with Omni-Channel for Government Cloud Plus		✓		
Keep Routing Work During Service Degradation		✓		
Feedback Management				
Do More with an Enhanced Data Mapper Page	✓			
Survey Invitations View in Contact Activity Tab Is No Longer Supported	✓			
Scheduled Reminders				
Boost Participation for Upcoming Events with Scheduled Reminders	✓			
Industries in Service Cloud				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Extend Your Service Cloud Implementation with Service Innovations from Industries		✓		
Create Rules with Business Rules Engine		✓		

Salesforce Overall

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

IN THIS SECTION:

[General Enhancements](#)

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

[Salesforce Scheduler](#)

Create group appointments and invite customers to enroll to service appointments. Provide unauthenticated users the flexibility to modify or cancel their appointments. Generate personalized emails for appointment invitations.

[Einstein Search](#)

Customize search, provide relevant results, and ensure security in Search Manager. Improve search with Search Manager and Search Analytics, and see more results with advanced lookup search.

[Salesforce Data Pipelines](#)

Connect to more data sources with the new Parquet connector and support for Virtual Private Connections on Snowflake.

General Enhancements

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

IN THIS SECTION:

[Create and Verify Your Default No-Reply Organization-Wide Email Address to Send Email \(Release Update\)](#)

To comply with increased email security standards, orgs are required to create and verify a Default No-reply address in Organization-Wide Email Address settings.

[Enable LWC Stacked Modals \(Release Update\)](#)

As part of the Salesforce internal migration from Aura to LWC, more modals in Lightning Experience now render using LWC. This update provides improved performance, especially when working with a large number of fields on a record create or edit modal. You can now also use Dynamic Forms in a modal that's opened from a Create from Lookup field on most LWC-enabled record pages. When you enable this update, you can expect minor changes to modal behavior. This update is available starting in Summer '24.

[Add the New Setup Domain](#)

Ensure that Setup pages in Lightning Experience load content correctly when browsers block third-party cookies. If your users have general access to the internet, no action is required. 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.

[Prepare for Restrictions on Salesforce Cookie Use](#)

To test custom functionality and code that uses a Salesforce session cookie before browsers fully block third-party cookies, enable the My Domain setting, Require first-party use of Salesforce cookies. For example, to load your authenticated Visualforce page in an iframe on a third-party website, the process uses a Salesforce session cookie. Also, if you previously enabled third-party cookies to use Lightning Out (beta) without a custom domain or token-based authentication, test the Lightning components that you deployed outside of Salesforce servers. Previously, to test the impact of this change on the use of Salesforce cookies, you set flags and settings in your browser, and those steps vary by browser.

[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 for users on Chrome 111 through 126 until September 2024.

[MFA Is On by Default for Direct Logins to Production Orgs](#)

To prevent unauthorized access to Salesforce accounts, multi-factor authentication (MFA) is required when users log in. To help customers satisfy this contractual security requirement, MFA is now a default part of the direct login process when a new production org goes live. Sandbox orgs aren't affected by this change. Orgs that are in a trial period aren't affected until they're converted to a subscription.

[Salesforce Admins Get In-App Reminders If MFA Is Turned Off](#)

As previously communicated, the contractual requirement to use multi-factor authentication (MFA) for Salesforce products is in full effect (as of February 1, 2022). Instead of the original plan to technically enforce the use of MFA, we've implemented a new notification model instead. If a customer disables the MFA org-wide setting, they no longer comply with the MFA requirement. All admins for the org receive periodic in-app warnings until MFA is re-enabled.

[Better Error Handling for Outdated Pages in Lightning Experience](#)

Experience a smoother workflow with more precise error handling if your page falls out of sync with the Salesforce server. Previously, an outdated page immediately triggered an error and a forced refresh. Now, the server attempts to process the outdated page. If the processing is successful, the page shows a warning message that reminds you to refresh the page when convenient. Rarely, the server can't process the outdated page. In this case, an error message prompts you to refresh the page, which resyncs the page to the server.

[See Improved Contrast in Focus States](#)

We've updated Salesforce Lightning Design System (SLDS) blueprints and Lightning base components with a new focus state styling that overrides the browser's default focus state styling. The new styling will appear as a dark blue line around the perimeter of the component. Depending on the component, this styling may be outset or inset. This change is turned on by default, and there's no option to turn it off.

[Monitor Net Zero Cloud Changes with Field History Tracking](#)

View changes to key Net Zero Cloud fields with Field History Tracking. You can add up to 20 fields per object on every Net Zero Cloud object, expanding your monitoring and data governance reach to sustainability and emissions data

[Work More Efficiently with the Improved Your Account Interface](#)

An updated interface provides a more consistent and improved experience, helping you find the information that matters most to you.

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The Product Catalog in the Your Account App provides a dedicated place where you can view and purchase Salesforce products or buy additional licenses and consumption-based resources.

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Now you can use Digital Wallet to monitor your product usage and detect trends over time for your consumption-based Salesforce products. Accessible through the Your Account app and Consumption Cards feature in the app launcher, Digital Wallet gives overviews and detailed breakdowns of your company's product usage in near real-time.

[Experience Improved Performance for Big Objects](#)

To optimize performance, data is no longer encoded or validated during the write process when it's larger than the maximum allowed size. When data is read, the UI layer interprets precision and scale as specified in the metadata. Previously, precision and scale were enforced when writing data to or reading data from a big object.

[Show Users Recommendations with Suggested for You](#)

Enable relevant, personalized suggestions based on your company's specific business needs and processes. Suggested for You provides recommendations to adopt new features, ways to do more with what you have, and products we think your users can benefit from.

[System Informational Banners Are Now Gray](#)

As part of a system-wide standardization of colors, all system informational banners, such as the sandbox logout confirmation, are now gray instead of blue.

Create and Verify Your Default No-Reply Organization-Wide Email Address to Send Email (Release Update)

To comply with increased email security standards, orgs are required to create and verify a Default No-reply address in Organization-Wide Email Address settings.

Where: This change applies to Lightning Experience and Salesforce Classic in all Editions, except Database.com.

When: This update was introduced with Summer '24 and Salesforce is scheduled to enforce it 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: The verified Default No-Reply organization-wide email address is used to send emails from your org. This update allows increased accountability for email deliverability.

How: In order to comply with increased email security standards, some emails will fail to be sent when lacking a customer defined Default No-Reply Organization-Wide Email Address.

SEE ALSO:

[Salesforce Help: Set Up a Default No-Reply Email Address \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Considerations for Using Organization-Wide Email Addresses \(can be outdated or unavailable during release preview\)](#)
[Release Updates](#)

Enable LWC Stacked Modals (Release Update)


As part of the Salesforce internal migration from Aura to LWC, more modals in Lightning Experience now render using LWC. This update provides improved performance, especially when working with a large number of fields on a record create or edit modal. You can now also use Dynamic Forms in a modal that's opened from a Create from Lookup field on most LWC-enabled record pages. When you enable this update, you can expect minor changes to modal behavior. This update is available starting in Summer '24.

Where: This change applies to Lightning Experience in all 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 then click the maintenance tab.

How: This update introduces minor changes to modal behavior. When you create a record via a lookup field, the **Save & New** button no longer appears. Additionally, post-save navigation no longer occurs on modals that are opened from a custom quick action. When creating a record from a stacked modal, you're returned to the record page on record save instead of navigating to the created record.

To review this update, from Setup, in the Quick Find box, enter *Release Updates*, and then select **Release Updates**. For Enable LWC Stacked Modals, follow the testing and activation steps.

-  **Note:** When working with actions, using Dynamic Forms via a Create from Lookup field is supported only for standard actions. Other types of actions, such as default actions and custom quick actions, continue to use information from the page layout.

If you use custom quick actions, consider these guidelines.

- **LWC quick actions**—When using the `lightning/navigation` module, the newer modal overlays and stacks on the previous modal by default. To automatically close the previous modal when navigating, set `replace` to `true`.
- **Aura quick actions**—If you used `force:createRecord` or `force:editRecord`, we recommend updating your code to use `lightning:navigation` so that you can control post-save navigation behavior. To use post-save navigation on record save, specify `navService.navigate(pageRef, true)`; where the `replace` property is `true`.

SEE ALSO:

[Salesforce Help: Break Up Your Record Details with Dynamic Forms \(can be outdated or unavailable during release preview\)](#)

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

[Lightning Web Components Developer Guide: Quick Action Navigation \(can be outdated or unavailable during release preview\)](#)

[Lightning Aura Components Developer Guide: Navigate to a Record Create Page with Default Field Values \(can be outdated or unavailable during release preview\)](#)

Add the New Setup Domain

Ensure that Setup pages in Lightning Experience load content correctly when browsers block third-party cookies. If your users have general access to the internet, no action is required. 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 feature continues its staggered rollout in Summer '24. The change is first enabled in sandboxes and nonproduction orgs, and then in production orgs.

SEE ALSO:

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

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

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

Prepare for Restrictions on Salesforce Cookie Use

To test custom functionality and code that uses a Salesforce session cookie before browsers fully block third-party cookies, enable the My Domain setting, Require first-party use of Salesforce cookies. For example, to load your authenticated Visualforce page in an iframe on a third-party website, the process uses a Salesforce session cookie. Also, if you previously enabled third-party cookies to use Lightning Out (beta) without a custom domain or token-based authentication, test the Lightning components that you deployed outside of Salesforce servers. Previously, to test the impact of this change on the use of Salesforce cookies, you set flags and settings in your browser, and those steps vary by browser.

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

Why: Major web browsers block third-party cookies by default. Users can configure some browsers to allow these cookies, but browser developers intend to stop offering that option. Notably, Google plans to fully block third-party access to Salesforce cookies in Chrome in December 2024.

How: To prevent third-party use of Salesforce cookies, from Setup, in the Quick Find box, enter *My Domain*, and then select **My Domain**. In the Routing and Policies section, click **Edit**. Enable **Require first-party use of Salesforce cookies**, and save your changes.

The screenshot shows the 'Routing and Policies' configuration page. At the top, there are 'Save' and 'Cancel' buttons. Below the title, there are three sections:

- Salesforce Edge Network:** A text block stating it applies to most domains and that it can't be enabled in this org. An information icon is present.
- Login Policy:** A text block stating it applies to My Domain login URLs. Below it are two checkboxes: 'Prevent login from https://login.salesforce.com' and 'Prevent SOAP API login from https://login.salesforce.com', both with information icons.
- Content Delivery Network:** A checkbox 'Use Content Delivery Network (CDN) by default when enhanced domains are enabled for Experience Cloud sites' is checked.

The 'Cookies' section is highlighted with an orange box. It contains a checkbox 'Require first-party use of Salesforce cookies' which is checked, with an information icon to its right. At the bottom of the page, there are 'Save' and 'Cancel' buttons.

Important: This setting only affects Salesforce cookies. To test calls from Salesforce that use a third-party cookie, including third-party applications embedded in Salesforce, disable third-party cookies in your browser.

SEE ALSO:

[Salesforce Help: Test the Impact of Blocked Salesforce Session Cookies \(can be outdated or unavailable during release preview\)](#)

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 for users on Chrome 111 through 126 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 for users on Chrome 111 through 126 on September 3, 2024. After this date, Google Chrome storage partitioning is enabled regardless of the setting.

Important: If you use this setting to opt out of Google Chrome storage partitioning, avoid upgrading to Chrome 127. Google's deprecation trial ended for users on Chrome 127 on July 23, 2024. Storage partitioning is now enabled for these users regardless of the setting.

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.

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.

SEE ALSO:

[Salesforce Help: User Interface Settings \(can be outdated or unavailable during release preview\)](#)

[Google Privacy Sandbox: Storage Partitioning](#)

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


MFA Is On by Default for Direct Logins to Production Orgs

To prevent unauthorized access to Salesforce accounts, multi-factor authentication (MFA) is required when users log in. To help customers satisfy this contractual security requirement, MFA is now a default part of the direct login process when a new production org goes live. Sandbox orgs aren't affected by this change. 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 versions of the mobile app in all editions.

When: This change went 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. To help protect against threats like phishing attacks and credential stuffing, Salesforce requires all users to log in with MFA. To learn more about the value of MFA and how it works, watch [this short video](#). For full details about the contractual requirement to use MFA, see the [Salesforce MFA FAQ](#).

 **Important:** MFA is also required for users who access Salesforce with single sign-on (SSO). If you use SSO for your production org, ensure that MFA is enabled for your SSO identity provider. Alternatively, you can use the free MFA functionality provided by Salesforce. See [Use Salesforce MFA for SSO Logins](#) in Salesforce Help.

How: Salesforce enables MFA for your production org's direct login process via the **Require multi-factor authentication (MFA) for all direct UI logins to your Salesforce org** setting on the Identity Verification page in Setup.

Each time a user logs in directly to your production org with their Salesforce username and password, they must also provide an MFA verification method. Verification method options include authenticator apps, security keys, and built-in authenticators. The first time the user logs in, they're guided through the steps to register their method.

There's a 30-day grace period where users can skip MFA. The grace period starts the first time any user logs in. After it starts, the 30-day clock applies uniformly to all users. For example, if a user logs in 20 days after the grace period began, they can skip MFA for 10 more days.

 **Note:** There are some use cases that aren't required to use MFA. For a few of these situations, a Salesforce admin must manually waive MFA for the affected user types. Check out [Exclude Exempt Users from MFA](#) in Salesforce Help for full guidance.

SEE ALSO:

[Salesforce Admins Get In-App Reminders If MFA Is Turned Off](#)

[Knowledge Article: Everything You Need to Know About Multi-Factor Authentication](#)

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

Salesforce Admins Get In-App Reminders If MFA Is Turned Off

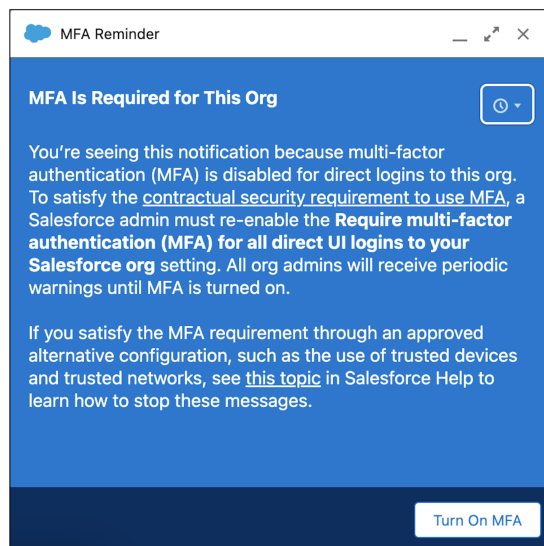
As previously communicated, the contractual requirement to use multi-factor authentication (MFA) for Salesforce products is in full effect (as of February 1, 2022). Instead of the original plan to technically enforce the use of MFA, we've implemented a new notification model instead. If a customer disables the MFA org-wide setting, they no longer comply with the MFA requirement. All admins for the org receive periodic in-app warnings until MFA is re-enabled.

Where: This change applies to Lightning Experience and all versions of the mobile app in all editions.

Why: Salesforce has finished automatically enabling MFA for direct logins to existing production orgs, and MFA is now turned on by default when new production orgs are created. Thanks to the partnership of our customers and their commitment to safeguarding user account access, this MFA program has been extremely successful. Because of high adoption rates for products built on the Salesforce Platform, and wanting to be respectful of your time and resources, we're shifting away from the original plan to enforce MFA by removing the option to turn it off. We recognize that it could be helpful for Salesforce admins to retain the option to briefly disable MFA for testing or configuration purposes. However, customers should keep in mind that if they turn off MFA, they're out of compliance with their contractual obligation to use it.

Important: The contractual requirement to use MFA for direct and SSO logins to products built on the Salesforce Platform remains in effect. This change doesn't apply to other Salesforce products where MFA is enforced.

How: If the **Require multi-factor authentication (MFA) for all direct UI logins to your Salesforce org** setting is disabled in a production org, all Salesforce admins see a warning prompt when working in Setup. These recurring prompts advise that the org is out of compliance with the contractual MFA requirement and provide guidance on how to proceed. An admin can select the **Turn On MFA** button in the prompt to go directly to the page in Setup where they can re-enable the MFA setting.



Admins can dismiss this prompt, but it reappears periodically until the MFA org-wide setting is turned on again.

SEE ALSO:

[Knowledge Article: Everything You Need to Know About Multi-Factor Authentication](#)

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

Better Error Handling for Outdated Pages in Lightning Experience

Experience a smoother workflow with more precise error handling if your page falls out of sync with the Salesforce server. Previously, an outdated page immediately triggered an error and a forced refresh. Now, the server attempts to process the outdated page. If the processing is successful, the page shows a warning message that reminds you to refresh the page when convenient. Rarely, the server can't process the outdated page. In this case, an error message prompts you to refresh the page, which resyncs the page to the server.

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

When: This change is applied on a rolling basis starting in Summer '24.

Why: This change handles a client-out-of-sync error, which can occur if the version of JavaScript that the page runs differs from the version that the server has. The JavaScript version resyncs when you refresh the page. The client-out-of-sync error is unrelated to your Salesforce data.

How: If an outdated page is processed, Salesforce shows one of these messages.

- Warning: This page has changes since the last refresh. To get the latest updates, save your work and finish your conversations before refreshing the page.
- Error: We couldn't process your request. Refresh the page and try again. Any unsaved changes are discarded when you refresh the page.

See Improved Contrast in Focus States

We've updated Salesforce Lightning Design System (SLDS) blueprints and Lightning base components with a new focus state styling that overrides the browser's default focus state styling. The new styling will appear as a dark blue line around the perimeter of the component. Depending on the component, this styling may be outset or inset. This change is turned on by default, and there's no option to turn it off.

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

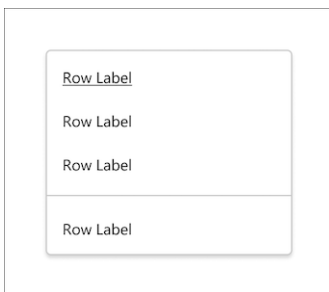
Why: Web Content Accessibility Guidelines (WCAG) include criteria for non-text contrast and focus appearance. Meeting these guidelines means that all users can more easily see the content on any device or in any lighting conditions.

With the current focus state colors in Salesforce, users with low vision who use a keyboard or other assistive devices sometimes struggle to see which element is focused on. This update satisfies WCAG's criteria for non-text contrast and makes it clear which element is focused on.

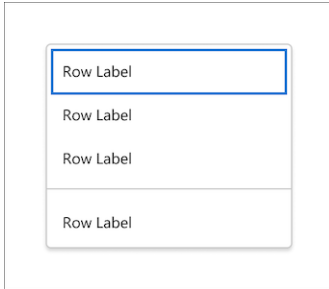
Old Styling vs. New Styling

The following images show examples of the old focus state styling versus the new focus state styling.

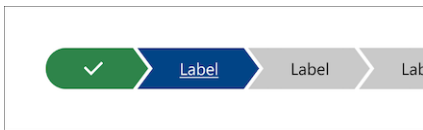
Old focus state styling:



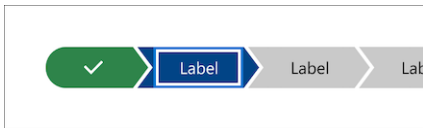
New focus state styling:



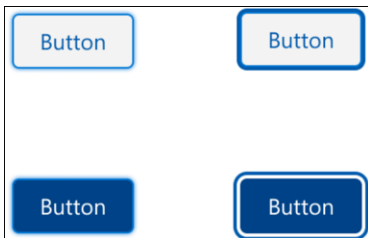
Old focus state styling:



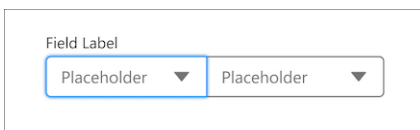
New focus state styling:



Old focus state styling (left images) vs. new focus state styling (right images):



Old focus state styling:



New focus state styling:



SEE ALSO:

[SLDS: Salesforce Lightning Design System](#)

[W3C: Web Content Accessibility Guidelines \(WCAG\)](#)

Monitor Net Zero Cloud Changes with Field History Tracking

View changes to key Net Zero Cloud fields with Field History Tracking. You can add up to 20 fields per object on every Net Zero Cloud object, expanding your monitoring and data governance reach to sustainability and emissions data

Where: This change applies to Salesforce Classic ([not available in all orgs](#)), Lightning Experience, and the Salesforce app in Contact Manager, Essentials, Group, Professional, Enterprise, Performance, Unlimited, Developer, and Database.com editions. Standard Objects aren't available in Database.com.

Who: This feature is available for customers with New Zero Cloud enabled.

How: From Setup, in the Quick Find box, enter *Field History Tracking*, and then select **Field History Tracking**. Click **View** on an object, enable tracking on that object, and then select the fields you want to track.

SEE ALSO:

[Track Value Changes in Key Objects and Fields](#)

[Audit Net Zero Cloud Field Changes](#)

[Salesforce Help: Field Audit Trail \(can be outdated or unavailable during release preview\)](#)

[Track Value Changes in Key Objects and Fields](#)

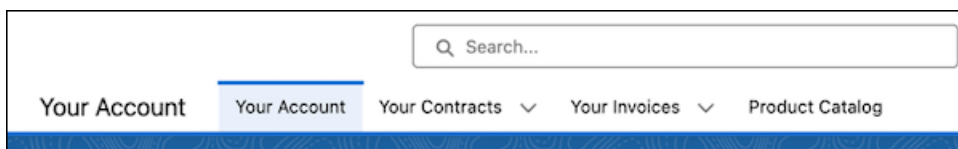
Work More Efficiently with the Improved Your Account Interface

An updated interface provides a more consistent and improved experience, helping you find the information that matters most to you.

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

Who: Your Account is available to users with the Manage Billing permission or the Your Account App Admin User permission set.

Why: Switch between your most frequent Your Account tasks with the new horizontal navigation menu. Increase your product and license count, manage quotes, contracts, and renewals, and pay invoices without having to return to the home page.



To view the horizontal navigation menu, enable tab visibility for custom profiles and standard profiles without the Manage Billing permission or the Your Account App Admin User permission set. In the Users - Profiles settings, set all Your Account tabs to Default On.

Important: If the Product Catalog tab is set to Tab Hidden, users can't access the feature.

As part of this enhancement, we created these virtual objects: SalesforceContract, SalesforceInvoice, SalesforcePayment, and SalesforceQuote.

See [New and Changed Objects](#)

SEE ALSO:

[Update User Profiles](#)

[View and Edit Tab Settings in Permission Sets](#)

[Tab Settings](#)

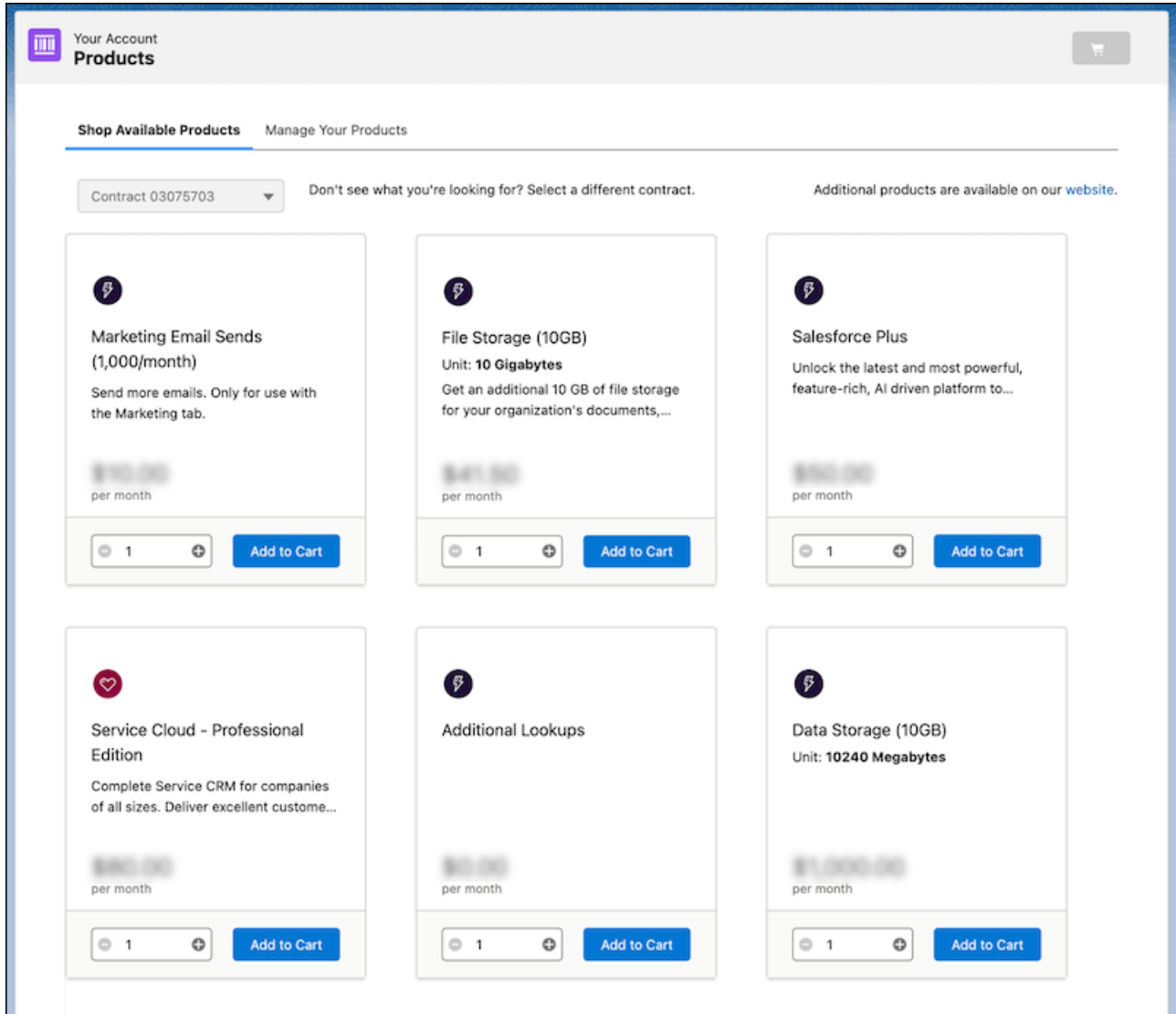
Find and Buy Salesforce Products Faster with the Improved Product Catalog

The Product Catalog in the Your Account App provides a dedicated place where you can view and purchase Salesforce products or buy additional licenses and consumption-based resources.

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

Who: Your Account is available to users with the Manage Billing permission or the Your Account App Admin User permission set.

Why: In the Shop Available Products tab, browse Salesforce products that you can add to your contract. In the Manage Your Products tab, browse a list of Salesforce products you own and buy additional licenses and consumption-based resources.



With detailed product descriptions, pricing, and discount information, the Product Catalog provides a comprehensive buying experience all in one place.

Important: To view the Product Catalog, enable tab visibility for custom profiles and standard profiles without the Manage Billing permission or the Your Account App Admin User permission set. In the Users - Profiles settings, set Product Catalog tab to Default On. If the Product Catalog tab is set to Tab Hidden, users can't access the feature.

How: In the Your Account app, click **Browse & Buy** or the Product Catalog tab.

SEE ALSO:

[Update User Profiles](#)

[View and Edit Tab Settings in Permission Sets](#)

[Tab Settings](#)

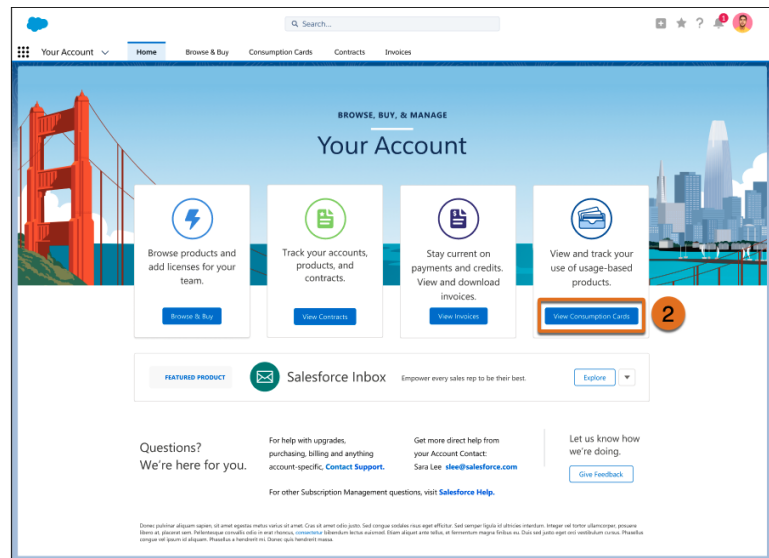
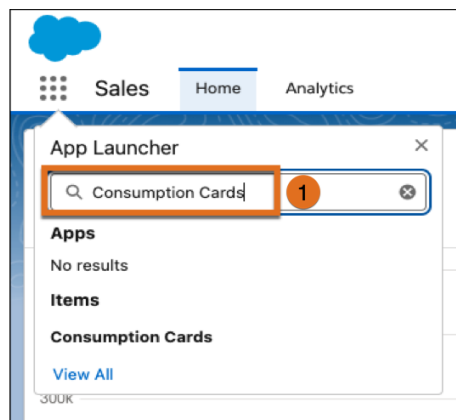
Monitor Product Consumption in Near Real-Time with Digital Wallet

Now you can use Digital Wallet to monitor your product usage and detect trends over time for your consumption-based Salesforce products. Accessible through the Your Account app and Consumption Cards feature in the app launcher, Digital Wallet gives overviews and detailed breakdowns of your company's product usage in near real-time.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions. Digital Wallet is available for Data Cloud consumption-based products. To learn more, see [Digital Wallet-Enabled Products and Rate Cards](#).

Who: Digital Wallet is available to users with the View Consumption user permission. Your Account is available to users with the Manage Billing permission or the Your Account App Admin User permission set.

How: Use the App Launcher to find Consumption Cards (1). Alternatively, in the Your Account app, click the Consumption Cards tab or **View Consumption Cards** (2) from the tile on the Home page.



SEE ALSO:

[About Digital Wallet](#)

Experience Improved Performance for Big Objects

To optimize performance, data is no longer encoded or validated during the write process when it's larger than the maximum allowed size. When data is read, the UI layer interprets precision and scale as specified in the metadata. Previously, precision and scale were enforced when writing data to or reading data from a big object.

Where: This change applies to Enterprise, Performance, Unlimited, and Developer editions.

When: This feature rolls out in May 2024.

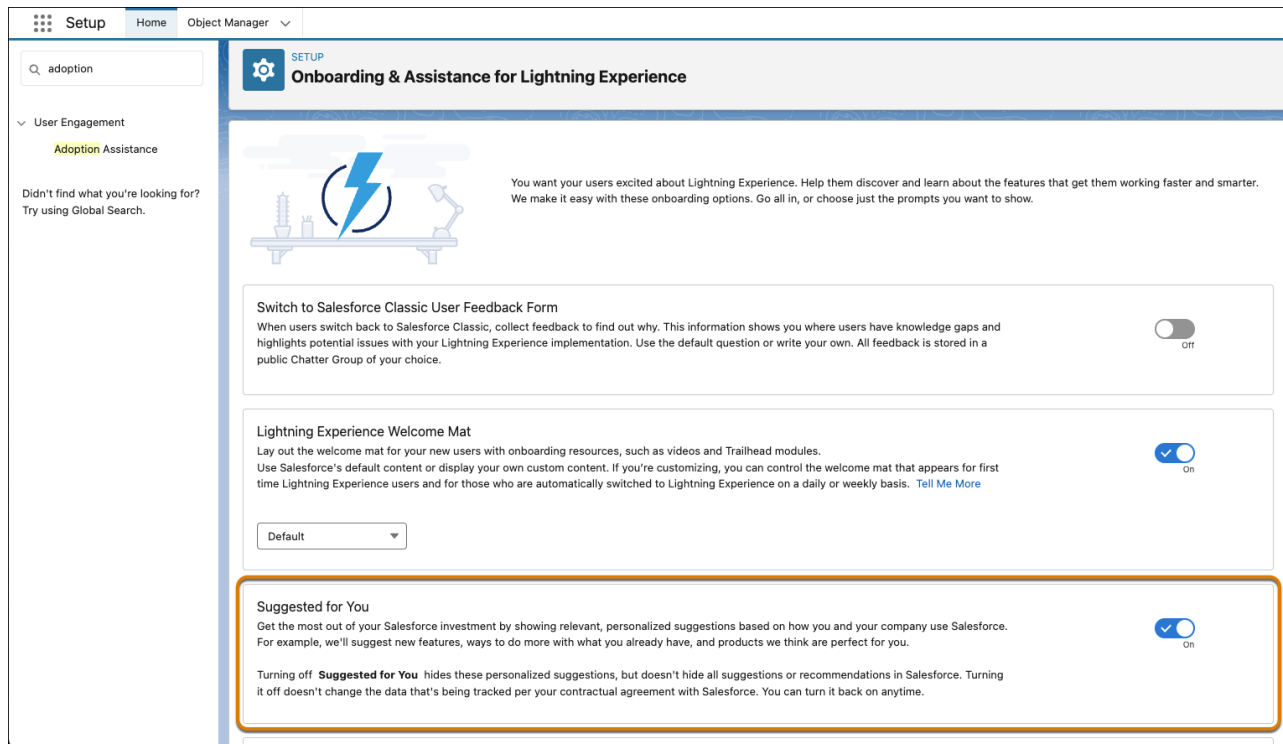
Show Users Recommendations with Suggested for You

Enable relevant, personalized suggestions based on your company's specific business needs and processes. Suggested for You provides recommendations to adopt new features, ways to do more with what you have, and products we think your users can benefit from.

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

When: This feature becomes available on July 12, 2024.

How: From Setup in Lightning Experience, in the Quick Find box, enter Adoption Assistance, and then select **Adoption Assistance**.



System Informational Banners Are Now Gray

As part of a system-wide standardization of colors, all system informational banners, such as the sandbox logout confirmation, are now gray instead of blue.

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

Salesforce Scheduler

Create group appointments and invite customers to enroll to service appointments. Provide unauthenticated users the flexibility to modify or cancel their appointments. Generate personalized emails for appointment invitations.

IN THIS SECTION:

[Invite Customers to Enroll in Group Service Appointments](#)

Create appointments for a large group of customers, and provide them with the flexibility to enroll in or unenroll from the service appointment. Directly enroll lead records and authenticated users to the appointment or share the group appointment enrollment URLs with unauthenticated users via email. You can also customize the default email templates to reflect brand personality and include the links for unenrollment.

[Enable Unauthenticated Users to Modify Service Appointments](#)

Unauthenticated users can now modify or cancel the service appointments that they created. Salesforce Scheduler provides customizable email templates that include links that redirect users to dedicated pages, allowing them to modify their appointments with ease.

[Generate Personalized Appointment Invitation Emails with Prompt Builder](#)

Save your end users time from manually writing appointment invitation emails by creating a Salesforce Scheduler Email prompt template.

[Other Changes to Salesforce Scheduler](#)

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

[New Connect REST API Resource in Salesforce Scheduler](#)

Connect REST APIs help customers, partners, and ISVs integrate with Salesforce software and UIs. Learn more about the new resource available in Salesforce Scheduler.

Invite Customers to Enroll in Group Service Appointments

Create appointments for a large group of customers, and provide them with the flexibility to enroll in or unenroll from the service appointment. Directly enroll lead records and authenticated users to the appointment or share the group appointment enrollment URLs with unauthenticated users via email. You can also customize the default email templates to reflect brand personality and include the links for unenrollment.

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

How: When you create the service appointment, use the group appointment mode. After you create the service appointment, you can add the customers who you want to enroll.

Appointment Booking

Select Service Resources

Select an appointment mode

Regular

Individual or multiple resource appointment

Group

Multiple attendee appointment

*Parent Record

Acme

Find a service resource

By work type group, appointment type, or service territory

By name

Search Service Resources...

By previously scheduled service appointments

Next

SEE ALSO:

[Salesforce Scheduler Help: Schedule an Outbound Appointment \(can be outdated or unavailable during release preview\)](#)

[Salesforce Scheduler Help: Enable Concurrent Scheduling for Group Service Appointments \(can be outdated or unavailable during release preview\)](#)

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

[Salesforce Scheduler Help: Considerations for Multiple Service Resource Events \(can be outdated or unavailable during release preview\)](#)

Enable Unauthenticated Users to Modify Service Appointments

Unauthenticated users can now modify or cancel the service appointments that they created. Salesforce Scheduler provides customizable email templates that include links that redirect users to dedicated pages, allowing them to modify their appointments with ease.

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

How: Click the link in the email notification that launches the flow to modify a service appointment for unauthenticated users.

SEE ALSO:

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

Generate Personalized Appointment Invitation Emails with Prompt Builder

Save your end users time from manually writing appointment invitation emails by creating a Salesforce Scheduler Email prompt template.

Where: Prompt Builder is available in Lightning Experience in Enterprise and Performance editions with the Einstein for Sales, Einstein for Platform, or Einstein for Service add-on. These add-ons include Data Cloud. Einstein generative AI is available in Lightning Experience.

Who: To use Salesforce Scheduler Email prompt template type, users need the Salesforce Scheduler AddOn license.

How: From Setup, in the Quick Find box, enter *Prompt*, and then select **Prompt Builder**. Create a prompt template by using the Salesforce Scheduler Email template type and the appointment invitation object.

New Prompt Template

Select the type of prompt template to build. Based on the template type, define the resources available for the template. [Learn more in Salesforce Help.](#)

* Prompt Template Type ⓘ
Salesforce Scheduler Email ▼

* Prompt Template Name
Lead Appointment Invitation

* API Name
Lead_Appointment_Invitation

Template Description
Email template to send appointment invitation to potential leads.

* Object ⓘ
Appointment Invitation ▼

Cancel Next

To purchase an add-on, contact your Salesforce account executive.

SEE ALSO:

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

[Salesforce Scheduler Help: Share Service Resource Availability with Actionable List Members \(can be outdated or unavailable during release preview\)](#)

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

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: All users with the Salesforce Scheduler permission set license can now use shift concurrency.

SEE ALSO:

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

New Connect REST API Resource in Salesforce Scheduler

Connect REST APIs help customers, partners, and ISVs integrate with Salesforce software and UIs. Learn more about the new resource available in Salesforce Scheduler.

Retrieve a list of group appointments along with the remaining attendee limit

Make a POST request to the new `/connect/scheduling/group-appointments` resource.

New request body: Group Appointments Input

New response body: Group Appointments

Einstein Search

Customize search, provide relevant results, and ensure security in Search Manager. Improve search with Search Manager and Search Analytics, and see more results with advanced lookup search.

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IN THIS SECTION:

[IdeaExchange Delivered: Improve Search for Users with Search Manager \(Generally Available\)](#)

Improve search efficiency and relevance by customizing search for your users in Search Manager. Create configurations for search channels, filter search for your users with rules, and configure objects to always search. This feature, now generally available, includes some changes since the beta release. We delivered this feature thanks to your ideas on IdeaExchange.

[Provide Relevant Results with Objects to Always Search in Search Manager \(Generally Available\)](#)

Select objects to always search in a global search configuration. Tailor your selection for a specific user profile. The page to select objects to always search has moved to Search Manager. This feature, now generally available, includes some changes since the beta release.

[Ensure Security in Search with Search Manager](#)

Apply field-level security to custom fields that contain sensitive information in Search Manager. All standard fields are protected by default. You can select up to 100 custom fields per object. If an object has more than 100 custom fields, the search engine matches results based on information in the unprotected additional fields. To prevent unwanted results, protect fields or remove unprotected fields from the search index.

[Improve Search with Insights from Search Analytics \(Pilot\)](#)

Analyze search-related data with the built-in dashboard or build your own dashboard. Use insights to make search engine changes, optimize content, and train users. For example, Search Analytics tells you when your users can't find results for certain search terms. You can then add content to address gaps or modify the search engine to include those search terms in synonym groups.



Improve Search for Users with Search Manager (Generally Available)

Improve search efficiency and relevance by customizing search for your users in Search Manager. Create configurations for search channels, filter search for your users with rules, and configure objects to always search. This feature, now generally available, includes some changes since the beta release. 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.

IN THIS SECTION:[Other Improvements in Search Manager](#)

Manage the search index, edit and delete configurations, and migrate configurations in Search Manager.

SEE ALSO:

[Provide Relevant Results with Objects to Always Search in Search Manager \(Generally Available\)](#)

[Ensure Security in Search with Search Manager](#)

[Other Improvements in Search Manager](#)

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

Other Improvements in Search Manager

Manage the search index, edit and delete configurations, and migrate configurations in Search Manager.

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

Why: Search Manager users can now:

- Manage the search index by adding and removing fields from objects.
- Clear up clutter by editing and deleting Search Manager configurations.
- Avoid repeating work by migrating Search Manager configurations between Salesforce orgs.

SEE ALSO:

[IdeaExchange Delivered: Improve Search for Users with Search Manager \(Generally Available\)](#)

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

[Salesforce Help: Manage the Search Index \(can be outdated or unavailable during release preview\)](#)

Provide Relevant Results with Objects to Always Search in Search Manager (Generally Available)

Select objects to always search in a global search configuration. Tailor your selection for a specific user profile. The page to select objects to always search has moved to Search Manager. This feature, now generally available, includes some changes since the beta release.

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

Why: For new users, Einstein sometimes doesn't have enough data to accurately determine which objects to search. Make sure your new users see objects relevant to their profile in their search results. For example, if marketing users in your Salesforce org always search for leads, select Lead as an object to always include in searches for marketing users.

SEE ALSO:

[IdeaExchange Delivered: Improve Search for Users with Search Manager \(Generally Available\)](#)

[Salesforce Help: Select Which Objects to Always Search in Global Search \(can be outdated or unavailable during release preview\)](#)

Ensure Security in Search with Search Manager

Apply field-level security to custom fields that contain sensitive information in Search Manager. All standard fields are protected by default. You can select up to 100 custom fields per object. If an object has more than 100 custom fields, the search engine matches results based on information in the unprotected additional fields. To prevent unwanted results, protect fields or remove unprotected fields from the search index.

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

When: After June 5, 2024, in your sandbox, go to Search Manager. If you have objects with unprotected fields, test the index configuration to resolve security risks. After June 12, migrate the configuration to your production org.

Why: Protect fields to prevent unwanted results. For example, add the Trade Union custom field to the Employee object and apply protection. If you don't protect this field, users can search for the trade union's name and find all employees in that trade union.

SEE ALSO:

[IdeaExchange Delivered: Improve Search for Users with Search Manager \(Generally Available\)](#)


[Salesforce Help: Protect Custom Fields in Search \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Manage the Search Index \(can be outdated or unavailable during release preview\)](#)

Improve Search with Insights from Search Analytics (Pilot)

Analyze search-related data with the built-in dashboard or build your own dashboard. Use insights to make search engine changes, optimize content, and train users. For example, Search Analytics tells you when your users can't find results for certain search terms. You can then add content to address gaps or modify the search engine to include those search terms in synonym groups.

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

 **Note:** This feature is not generally available and is being piloted with certain Customers subject to additional terms and conditions. It is not part of your purchased Services. This feature is subject to change, may be discontinued with no notice at any time in 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: To use Search Analytics, you need a Data Cloud license and Data Cloud credits.

How: From Setup, in the Quick Find box, enter *Einstein Search*, and then select **Settings**.

SEE ALSO:

[Salesforce Help: Getting Insights with Search Analytics \(Pilot\) \(can be outdated or unavailable during release preview\)](#)

Salesforce Data Pipelines

Connect to more data sources with the new Parquet connector and support for Virtual Private Connections on Snowflake.

IN THIS SECTION:

[Access Your Snowflake Data Using VPC on AWS \(Pilot\)](#)

You can now gain insights into your private Snowflake data in Salesforce Data Pipelines. Create a remote connection using the Virtual Private Connection (VPC) for Snowflake on AWS connector to sync data from Snowflake to Data Manager. Using the AWS VPC interface endpoints provides secure connectivity to Snowflake internal stages and ensures that data transfer from Snowflake takes place on the AWS internal network and doesn't use the public internet.


[Optimize Recipes That Use the Local Salesforce Connection \(Pilot\)](#)

Improve the performance of recipes run after a full local Salesforce object sync by choosing to optimize the synced data.

Access Your Snowflake Data Using VPC on AWS (Pilot)

You can now gain insights into your private Snowflake data in Salesforce Data Pipelines. Create a remote connection using the Virtual Private Connection (VPC) for Snowflake on AWS connector to sync data from Snowflake to Data Manager. Using the AWS VPC interface endpoints provides secure connectivity to Snowflake internal stages and ensures that data transfer from Snowflake takes place on the AWS internal network and doesn't use the public internet.

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

 **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.

How: From Setup, in the Quick Find box, enter *Private*, and select **Private Connect**. Create an outbound connection, and then on the Named Credentials page create external credentials and named credentials. In Data Manager, create a new connection for the Snowflake Private Connector.

SEE ALSO:


[Knowledge Article: Participate in a Salesforce Pilot](#)

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

Optimize Recipes That Use the Local Salesforce Connection (Pilot)

Improve the performance of recipes run after a full local Salesforce object sync by choosing to optimize the synced data.

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

 **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.

How: In Data Manager, open the Connections option. Under SFDC_LOCAL, click the object that you want to optimize full syncs for. Then, on the Data Sync Settings tab, select **Optimize data sync for future runs**. It's recommended that you use a sandbox environment to test this feature.

SEE ALSO:

[Knowledge Article: Participate in a Salesforce Pilot](#)

[Salesforce Help: Optimize Recipes That Use the Local Salesforce Connection \(Pilot\) \(can be outdated or unavailable during release preview\)](#)

Release Updates

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

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

Often, release updates provide a Test Run option so you can enable an update and examine any changes to your org, including changes to customizations, before that update's Complete Steps By date. 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.

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.

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.

Grant Access to the Label Object In Custom Profiles To Continue Using To Do List Labels (Release Update)

The Label object is now available in the API. This change supports the Record Labels feature in Sales Cloud. Standard profiles include access to the Label object automatically. If you use custom profiles, add access to the Label object to let users assign labels to records and continue using labels in the To Do List.

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.

Create and Verify Your Default No-Reply Organization-Wide Email Address to Send Email (Release Update)

After Winter '25, to comply with increased email security standards, orgs are required to create and verify a Default No-reply address in Organization-Wide Email Address settings.

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.

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. 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.

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 in Spring '24.

Prevent Guest User from Editing or Deleting Approval Requests (Release Update)

After Prevent Guest User from Editing or Deleting Approval Requests is enabled, guest users can approve or reject an approval request. Guest users are no longer able to edit, reassign, or delete approval requests. This update was first 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. This update is available starting in Winter '24.

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.

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 supports agent productivity specific to your business needs.

Use REST API for Access to External Client App OAuth Consumer Credentials (Release Update)

To follow recommended security standards, use the new `credentials` Connect REST API resource instead of Metadata API to access External Client App OAuth consumer credentials.

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.

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.

Adopt Updated Content Security Policy (CSP) Directives (Release Update)

To help protect your org from cross-site scripting and other code-injection attacks, Salesforce updated the delivered CSP directives for Lightning pages. This change can prevent externally hosted fonts and images from loading. It can also prevent external websites from loading within an iframe on your Lightning pages. To prepare for this change, review the impact and update your trusted URLs. This update was available starting in Summer '24 and was scheduled to be enforced in Winter '25, but we postponed the enforcement date to Spring '25.

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 was first available in Winter '21.

Enable LWC Stacked Modals (Release Update)

As part of the Salesforce internal migration from Aura to LWC, more modals in Lightning Experience now render using LWC. This update provides improved performance, especially when working with a large number of fields on a record create or edit modal. You can now also use Dynamic Forms in a modal that's opened from a Create from Lookup field on most LWC-enabled record pages. When you enable this update, you can expect minor changes to modal behavior. This update is available starting in Summer '24 and will be enforced in Spring '25.

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 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 Permission Requirements Defined on Built-In Apex Classes Used as Inputs (Release Update)

This update enables permission requirements to be enforced for file-based Apex classes that are used as inputs for Apex actions. It also guarantees that the affected Apex action operates within the current component context. Currently, Apex actions rely on the previous component context. This behavior leads to failed flow interviews when the flow includes an Apex action that contains a file-based Apex class with permission requirements as input.

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.

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 was first available in Spring '24 and was scheduled to be enforced in Winter '25, but we postponed the enforcement date to Spring '25. If your organization doesn't use roles, this update has no impact.

Sort Apex Batch Action Results by Request Order (Release Update)

This update enables Apex batch action results to be displayed in the order the requests are received. Currently, error-prone requests are prioritized at the top of the result list, while successful ones are positioned at the bottom.

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. This update was generally available in Lightning Experience in Spring '24.

Use an Apex-Defined Variable for All Intelligence Signal Types (Release Update)

This release update adds a new intelligenceSignals flow input parameter that contains detected conversation intelligence signals. Use this Apex-defined input parameter for your Recommendation Strategy and autolaunched flows linked to a Conversation Intelligence rule. This update is available starting in 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 was first made available in Spring '24. It was scheduled to be enforced for all instances in Summer '24, but we postponed the enforcement date for production instances to Spring '25. This update is still enforced for sandboxes in Summer '24.

Scheduled to Be Enforced in Summer '25

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

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

This update fixes a bug with the evaluation criteria in processes that have multiple criteria and a record update. This release update ensures that a process with multiple criteria and a record update evaluates the original value of the field that began the process with a value of null. This update was first made available in Summer '19.

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

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

IN THIS SECTION:[Unified Analytics Experiences](#)

Post snapshots of CRM Analytics dashboards and lenses in Slack. Add any collection created in Analytics as a component of your Lightning page.

[Data Cloud Reports and Dashboards](#)

Track important metrics in matrix format. Include unstructured data in your reports. Get help from Einstein generative AI when creating report formulas.

[CRM Analytics](#)

Distribute CRM Analytics dashboards and lenses to expanded audiences with new Lightning web components.

[Intelligent Analytics Apps](#)

Make data-driven decisions fueled by product, shopper, and inventory insights in Commerce Intelligence. Identify trends in your service operations with insights from Field Service Intelligence.

[Einstein Discovery](#)

Externally built models are being retired.

[Tableau](#)

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

[Marketing Cloud Intelligence](#)

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

Unified Analytics Experiences

Post snapshots of CRM Analytics dashboards and lenses in Slack. Add any collection created in Analytics as a component of your Lightning page.

IN THIS SECTION:[Post from CRM Analytics to Slack](#)

Facilitate data-driven collaboration by sharing directly from CRM Analytics to your channels in Slack. Now you can post CRM Analytics dashboards and lenses, including intelligent app dashboards. Slack recipients get a snapshot showing the latest data. Or post a link with quick action buttons that can include view details, share, subscribe, and download from Slack.

[Access Any Analytics Collection in Lightning Pages](#)

Provide analytics where your users work with embedded collections on Lightning pages. In the Lightning App Builder, you can now select any Analytics collection to be a component of your page. Previously, only the first collection was available for embedding. A collection can include CRM Analytics dashboards and lenses, Lightning reports and dashboards, and Tableau dashboards.

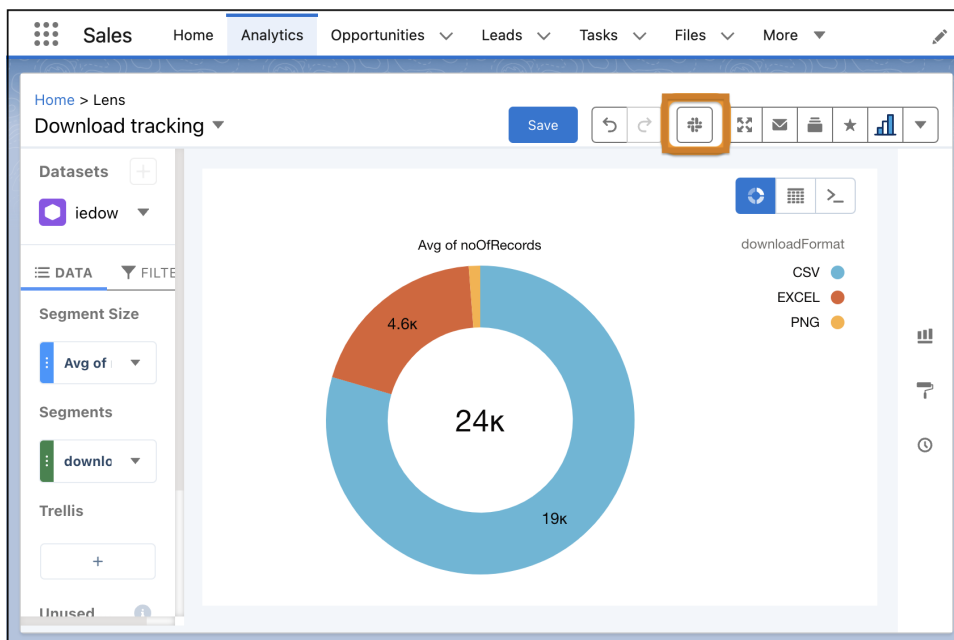
Post from CRM Analytics to Slack

Facilitate data-driven collaboration by sharing directly from CRM Analytics to your channels in Slack. Now you can post CRM Analytics dashboards and lenses, including intelligent app dashboards. Slack recipients get a snapshot showing the latest data. Or post a link with quick action buttons that can include view details, share, subscribe, and download from Slack.

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

Who: Users must have the Connect Salesforce with Slack system permission in Salesforce, and they must connect their CRM Analytics for Slack app in their Slack workspace to their Salesforce account. To post snapshots, users need the Download CRM Analytics Data permission, and if Secure Image Sharing and Downloading is enabled, they also need the Share CRM Analytics Images permission.

How: On a dashboard or lens that's been saved in CRM Analytics, click the Post to Slack icon.



Select the Slack workspace and channels where you want to share the item. Optionally, add a comment to spark conversation with your teammates.

Post to Slack

Before posting in Slack, make sure recipients have access to the lens.

* Select a Workspace: Salesforce × Send to: Q

#public-channel (public) ×

Message (optional):


Image Preview: ×

All shared images are public.

Cancel Post

You can post with or without a snapshot. Both options include a link to the item in CRM Analytics.

Today ▾



CRM Analytics APP 10:38 AM

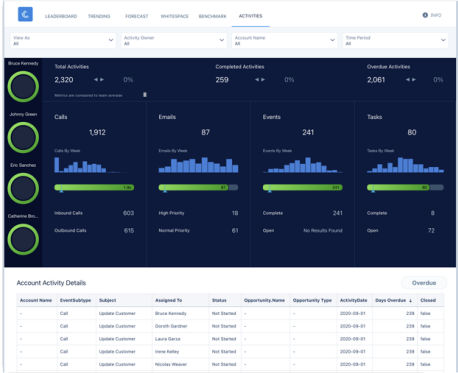
Check out this snapshot of our dashboard!

Shared by *Karen*


Dashboard | [Gallery - Activity Components](#)

In Customer Insights • Last Viewed On Apr 7, 2024 5:34 PM

Gallery - Activity Components ▾



Today ▾



CRM Analytics APP 10:38 AM

Here's the post without a snapshot.

Shared by *Karen*

Dashboard | [Gallery - Activity Components](#)

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

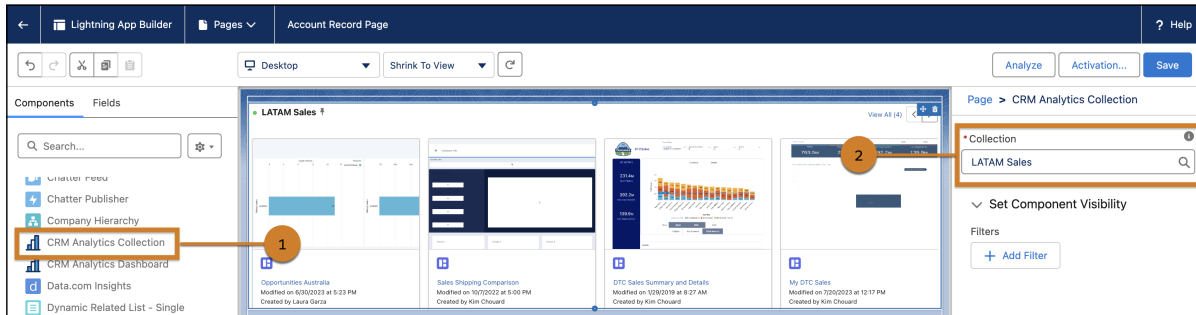
Access Any Analytics Collection in Lightning Pages

Provide analytics where your users work with embedded collections on Lightning pages. In the Lightning App Builder, you can now select any Analytics collection to be a component of your page. Previously, only the first collection was available for embedding. A collection can include CRM Analytics dashboards and lenses, Lightning reports and dashboards, and Tableau dashboards.

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

How: In the Lightning App Builder, add the CRM Analytics Collection component to your page (1). Select an available collection from the Collection lookup in the configuration panel (2).

126



SEE ALSO:

[Salesforce Help: Curate and Share Insights with Collections](#)

[Salesforce Help: Add Collections to Lightning Pages](#)

Data Cloud Reports and Dashboards

Track important metrics in matrix format. Include unstructured data in your reports. Get help from Einstein generative AI when creating report formulas.

IN THIS SECTION:

[Summarize Complex Data with Matrix Reports](#)

Get a comprehensive view of your data at a glance by grouping Data Cloud records in a matrix format. Surface trends across sections of the data by comparing subtotals. For a broader perspective, review the totals and grand totals in the report. For example, identify customers' shopping patterns by adding a row grouping for event type and a column grouping for product category in a matrix report. You can add up to two row-level and two-column level groups, which can also be based on formulas.

[Analyze Data from Unified Objects and Related Source Objects](#)

Data Cloud reports now support unified link objects that are key to identity resolution, so you can review records from a unified object and related source objects in the same report. For example, to review customer details from different sources along with key qualifier IDs, build a custom report that relates Individual, Unified Individual, and Unified Individual Link Object DMOs.

[Export More Records from Data Cloud Reports](#)

Export up to 50,000 rows from a Data Cloud report using the .csv, .xls, or .xlsx file formats. This limit includes totals and subtotals. Previously, the limit was 2,000 rows.

[Build More Granular Reports on Calculated Insights](#)

To get a more in-depth analysis of metrics from a calculated insight object, add up to five dimensions as groups to a calculated insight report. Previously, you could include up to three dimensions. With this enhancement, you can define non-aggregatable measures with higher precision, such as ranking. For example, focus your marketing efforts with a report that ranks web traffic sources based on five demographic characteristics: age group, gender, education, income, and family status.

[Unlock Insights from Unstructured Data](#)

Sometimes the relevant customer information that you capture, such as call notes and chat transcripts, resides as unstructured data in your data source. With Data Cloud reports, you can process unstructured data in a data model object (DMO), analyze it, and report on it. For example, review customer satisfaction scores alongside customer comments from the Survey Response DMO. Or, include PDF files of case notes from case DMO records for future reference.

[Add Calculated Fields to Your Data Cloud Reports with Einstein Generative AI](#)

Customizing reports to meet your business needs is much easier when Einstein Report Formula Generation assists with the technical work of creating row-level and summary formulas. Describe a calculation in simple terms, and Einstein discovers the relevant data and suggests a formula. Previously, constructing formulas for calculated fields required expertise in data models, objects and fields, available functions, and the various limitations of data types and formula types.

[Use Smart Totals with Formula Fields](#)

You can now use smart totaling in Data Cloud reports that include a formula field column. For example, in a Sales Order DMO, the total order amount is calculated using a formula with the unit price and quantity for each line item. When you run a report on the DMO, smart totaling ensures that each line item in the sales order is included in subtotals and grand totals only once.

Summarize Complex Data with Matrix Reports

Get a comprehensive view of your data at a glance by grouping Data Cloud records in a matrix format. Surface trends across sections of the data by comparing subtotals. For a broader perspective, review the totals and grand totals in the report. For example, identify customers' shopping patterns by adding a row grouping for event type and a column grouping for product category in a matrix report. You can add up to two row-level and two-column level groups, which can also be based on formulas.

Where: This change applies to Data Cloud in Developer, Enterprise, Performance, and Unlimited editions.

How: From the Reports tab or from the report run page, click next to a field name and select **Groups Rows by This Field** or **Groups Columns by This Field**.

Report: Shopping Cart Engagement
New Shopping Cart Engagement Report

Total Records
 59

	Shopping Cart Engagement Id	Shopping Cart Event Type	Account Contact	Product	Product Category
1	31607	Checkout Success		Skis	Climbing Gear
2	6456	Add to Cart		board	Watersports Gear
3	86666	Checkout in Progress		n Snowboard	Camp & Hike
4	42003	Remove from Cart		Skis	Watersports Gear
5	74791	Checkout in Progress		Shoes	Camp & Hike
6	98863	Checkout Success		Skis	Watersports Gear
7	84715	Add to Cart	Cesar Chillis	3-Person Towable Tube	Camp & Hike

Shopping Cart Event Type	Product Category	Camp & Hike	Climbing Gear	Snow Equipment	Watersports Gear	Total
<input type="checkbox"/> Add to Cart	Record Count	5	6	2	9	22
<input type="checkbox"/> Checkout Failed	Record Count	1	-	1	2	4
<input type="checkbox"/> Checkout Success	Record Count	3	3	5	-	11
<input type="checkbox"/> Checkout in Progress	Record Count	6	3	3	5	17
<input type="checkbox"/> Remove from Cart	Record Count	1	2	1	1	5
Total	Record Count	16	14	12	17	59

Details (3 Rows) Shopping Cart Event Type = Checkout in Progress Product Category = Snow Equipment Clear

	Shopping Cart Engagement Id	Account Contact	Product
1	96518	Bill Dadio	Carbon Skis
2	70116	Miner Longlands	Mountain Snowboard
3	86666	Karoline Insall	Mountain Snowboard
4			

Row Counts Detail Rows Grand Total Stacked Summaries

Analyze Data from Unified Objects and Related Source Objects

Data Cloud reports now support unified link objects that are key to identity resolution, so you can review records from a unified object and related source objects in the same report. For example, to review customer details from different sources along with key qualifier IDs, build a custom report that relates Individual, Unified Individual, and Unified Individual Link Object DMOs.

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 unified object DMO as the primary object, and specify the report's Store-in category. Relate the primary object to the data source object and the unified link object DMOs. Then specify the fields that you want to display.

Report Types Setup:

- A Unified Individual (Data Cloud)** - Primary Object
- B Unified Link Individual (Data Cloud)**
 - A to B Relationship:**
 - Each "A" record must have at least one related "B" record.
 - "A" records may or may not have related "B" records.
- C Individual (Data Cloud)**
 - B to C Relationship:**
 - Each "B" record must have at least one related "C" record.
 - "B" records may or may not have related "C" records.

Report: Individual with Unified Individual Link - New Report

Total Records: 11

	Person Name	Key Qualifier Id	Last Modified Date
1	Pam Owenby	408	3/4/2024, 1:27 AM
2	Jacklyn Rogers	360	8/8/2023, 11:19 AM
3	Palmer Ivkovic	932	2/11/2024, 12:19 AM
4	Val Biddlecombe	083	2/27/2024, 7:00 PM
5	Rose Campbell	779	12/17/2023, 11:49 AM
6	Karen Synder	345	6/11/2023, 6:29 PM
7	Cesar Chilles	001	1/7/2024, 3:21 PM
8	Amelia Song	914	6/9/2023, 6:41 PM
9	Benjamin Blair	095	5/13/2023, 6:08 PM
10	Jack Davis	712	2/10/2023, 5:41 PM
11	Aaron James	297	8/17/2023, 8:41 PM

SEE ALSO:

[Salesforce Video: Build a Data Cloud Report Using a Custom Report Type](#)

[Salesforce Help: Unified Link Objects and Relationships to Unified Objects \(can be outdated or unavailable during release preview\)](#)

Export More Records from Data Cloud Reports

Export up to 50,000 rows from a Data Cloud report using the .csv, .xls, or .xlsx file formats. This limit includes totals and subtotals. Previously, the limit was 2,000 rows.

Where: This change applies to Data Cloud in Developer, Enterprise, Performance, and Unlimited editions.

How: From the Reports tab or from the report run page, click and select **Export**.

Data Cloud Report: Shopping Cart Engagement

Report: Shopping Cart Engagement
New Shopping Cart Engagement Report

Shopping Cart Event Type	Shopping Cart Engagement Id	Account Contact	Product Category
Add to cart (22)	12976	Jacklyn Rogers	Watersports Gear
	89723	Aaron James	Watersports Gear
	60786	Pam Owenby	Watersports Gear
	84718	Teena Enocksson	Camp & Hike
	67057	Norm May	Snow Equipment

Buttons: Add Chart, Edit, Save, Export

Build More Granular Reports on Calculated Insights

To get a more in-depth analysis of metrics from a calculated insight object, add up to five dimensions as groups to a calculated insight report. Previously, you could include up to three dimensions. With this enhancement, you can define non-aggregatable measures with higher precision, such as ranking. For example, focus your marketing efforts with a report that ranks web traffic sources based on five demographic characteristics: age group, gender, education, income, and family status.

Where: This change applies to Data Cloud in Developer, Enterprise, Performance, and Unlimited editions.

Unlock Insights from Unstructured Data

Sometimes the relevant customer information that you capture, such as call notes and chat transcripts, resides as unstructured data in your data source. With Data Cloud reports, you can process unstructured data in a data model object (DMO), analyze it, and report on it. For example, review customer satisfaction scores alongside customer comments from the Survey Response DMO. Or, include PDF files of case notes from case DMO records for future reference.

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**. Build a custom report type using the DMO that contains the unstructured data as a primary or secondary object. Relate other DMOs to suit your reporting needs, and specify the fields that you want to display.

SEE ALSO:

[Salesforce Video: Build a Data Cloud Report Using a Custom Report Type](#)

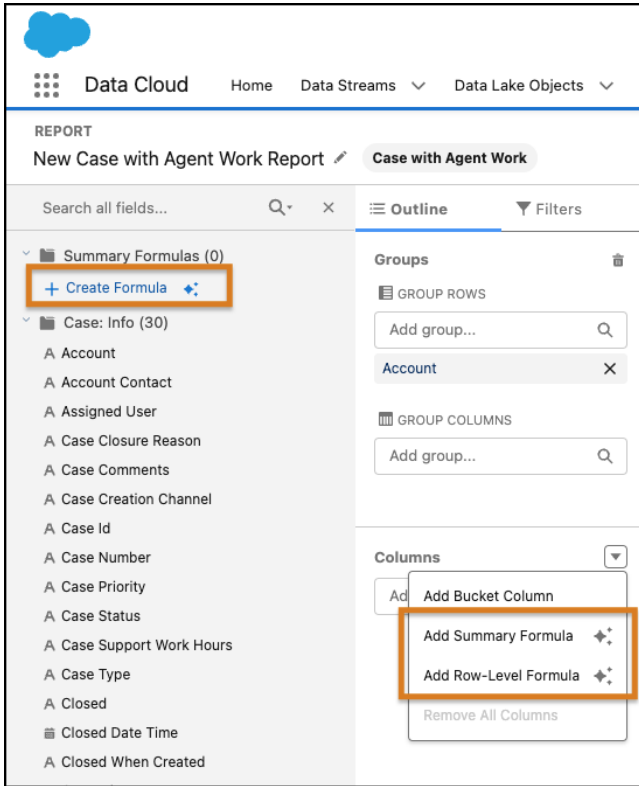
Add Calculated Fields to Your Data Cloud Reports with Einstein Generative AI

Customizing reports to meet your business needs is much easier when Einstein Report Formula Generation assists with the technical work of creating row-level and summary formulas. Describe a calculation in simple terms, and Einstein discovers the relevant data and suggests a formula. Previously, constructing formulas for calculated fields required expertise in data models, objects and fields, available functions, and the various limitations of data types and formula types.

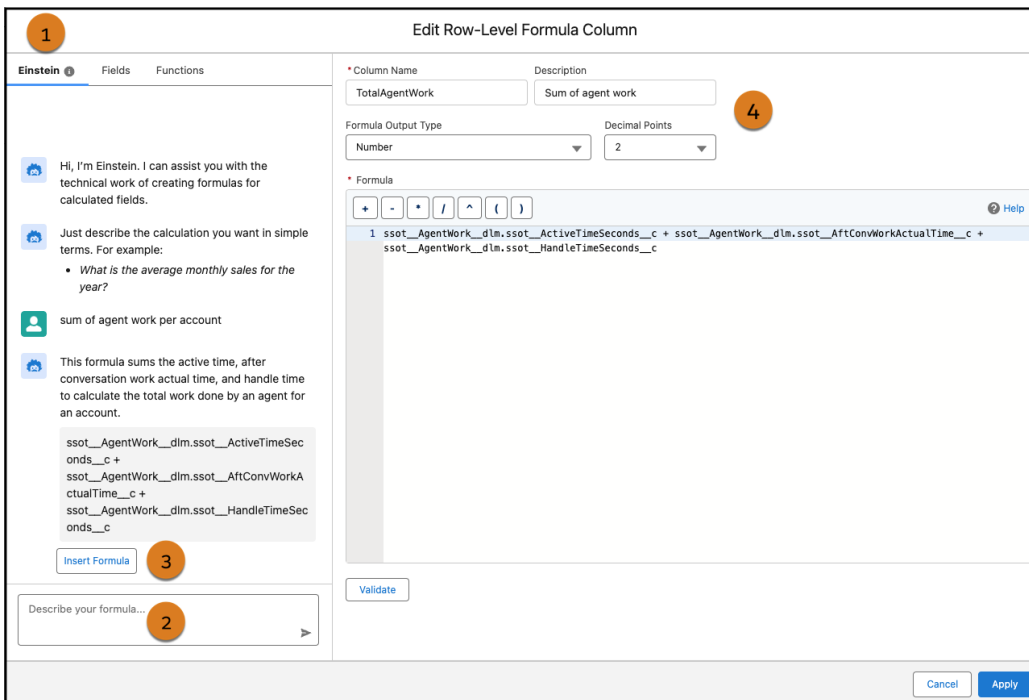
Where: This change applies to Data Cloud in Enterprise, Performance, Unlimited, and Developer editions with Einstein 1 Sales Edition or Einstein 1 Service Edition and the DC Report GPT add-on. Einstein generative AI is available in Lightning Experience.

How: From Setup, in the Quick Find box, enter *Einstein Setup*, and then select **Einstein Setup**. Enable **Turn on Einstein**.

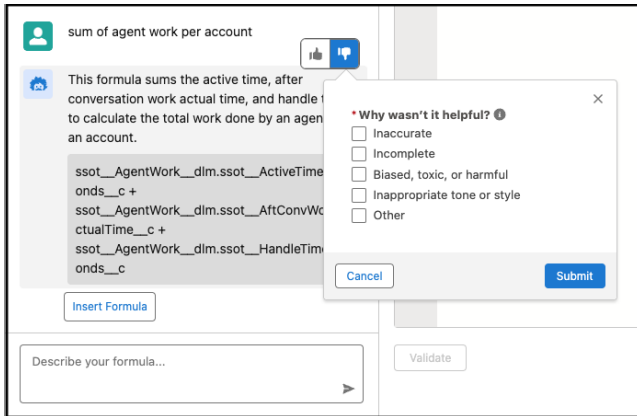
When editing a report, select **Create Formula** in the Fields panel, or select **Add Summary Formula** or **Add Row-Level Formula** in the Columns menu.



In the formula builder, on the Einstein tab (1), describe the calculation that you want (2). You can ask questions such as, “How many days did it take each opportunity to close?” or “After deducting taxes and expenses, what are our net earnings?” If the Einstein formula looks good, click **Insert Formula** (3) and Einstein fills in all the fields for you (4).



Feedback can help us improve, and it's greatly appreciated. Access the thumbs up and thumbs down icons by hovering on Einstein's response.



SEE ALSO:

[Einstein Features](#)

[Cross Cloud Updates for Data Cloud](#)

[Salesforce Help: About Einstein Generative AI](#)

[Salesforce Help: Adding Calculated Columns with Einstein Report Formula Generation \(can be outdated or unavailable during release preview\)](#)

Use Smart Totals with Formula Fields

You can now use smart totaling in Data Cloud reports that include a formula field column. For example, in a Sales Order DMO, the total order amount is calculated using a formula with the unit price and quantity for each line item. When you run a report on the DMO, smart totaling ensures that each line item in the sales order is included in subtotals and grand totals only once.

Where: This change applies to Data Cloud in Developer, Enterprise, Performance, and Unlimited editions.

Report: Sales Order New Sales Order Report				
Total Records	Total Product Quantity	Total Unit Price	Total Total Billing Amount	
5	7.000000	1,495.0000	1,920.00	
<input type="checkbox"/> Sold To Customer ↑	Product	Product Quantity	Unit Price	<input type="checkbox"/> Total Billing Amount
<input type="checkbox"/> Adam Young (2)	Carbon Skis	1.000000	465.0000	465.00
	Full Body Harness	2.000000	75.0000	150.00
Subtotal		3.000000	540.0000	615.00
<input type="checkbox"/> Blake Zambrano (2)	Carbon Skis	1.000000	465.0000	465.00
	Combo Water Skis	1.000000	140.0000	140.00
Subtotal		2.000000	605.0000	605.00
<input type="checkbox"/> Sean Collins (1)	1-Person Sleeping Bag	2.000000	350.0000	700.00
Subtotal		2.000000	350.0000	700.00
Total (5)		7.000000	1,495.0000	1,920.00

CRM Analytics

Distribute CRM Analytics dashboards and lenses to expanded audiences with new Lightning web components.

IN THIS SECTION:

[Analytics Visualization and Sharing](#)

Apply conditional formatting in waterfall charts. Embed dashboards in Lightning Experience and Experience Cloud pages with the new, native CRM Analytics Dashboard Lightning web component.

[Analytics Data Integration](#)

Connect to secure data sources with support for Virtual Private Connections on Snowflake.

[CRM Analytics Development](#)

Inspect your Analytics assets and execute queries using the new CRM Analytics Connect API Postman collection.

Analytics Visualization and Sharing

Apply conditional formatting in waterfall charts. Embed dashboards in Lightning Experience and Experience Cloud pages with the new, native CRM Analytics Dashboard Lightning web component.

IN THIS SECTION:

[Amplify Visual Impact In Waterfall Charts with Conditional Formatting](#)

Help users quickly spot areas of interest and get deeper exploration of their data by adding conditional formatting to waterfall charts. Previously, your data had to be configured with other supported chart types that weren't as compelling with displaying how positive and negative changes impacted initial data values.

[Embed CRM Analytics Dashboards in LWR Sites \(Generally Available\)](#)

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 \(Generally Available\)](#)

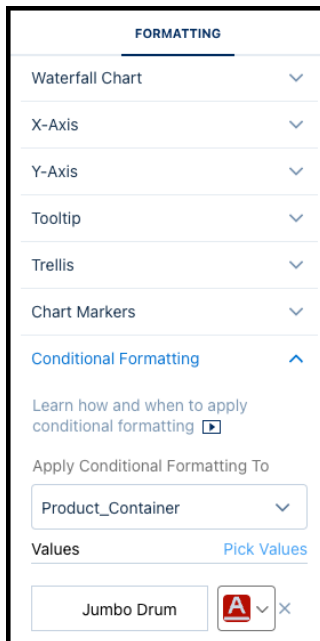
Embed your CRM Analytics dashboards in Lightning Experience pages with the new, native CRM Analytics Dashboard Lightning web component. The component works seamlessly in Lightning Experience pages and LWR sites. For example, customers can view visualizations of opportunity data alongside their opportunity information.

Amplify Visual Impact In Waterfall Charts with Conditional Formatting

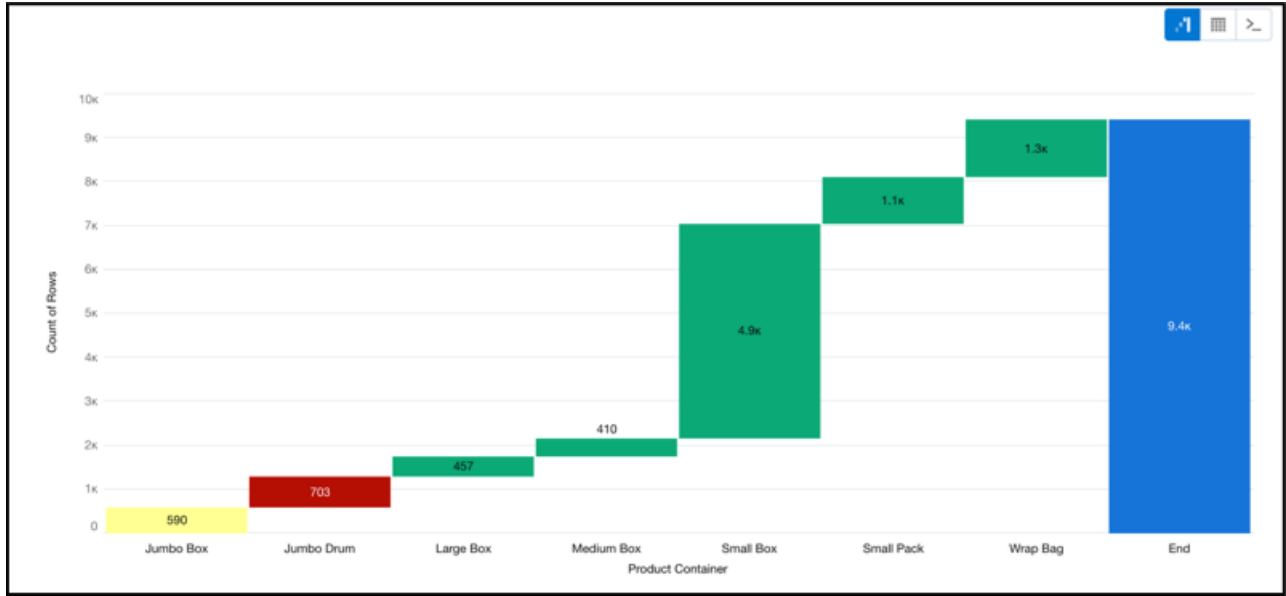
Help users quickly spot areas of interest and get deeper exploration of their data by adding conditional formatting to waterfall charts. Previously, your data had to be configured with other supported chart types that weren't as compelling with displaying how positive and negative changes impacted initial data values.

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

How: Open or create a dashboard with a waterfall chart. Click **Formatting** and open Conditional Formatting.



Apply a conditional formatting rule to a field. For example, highlight when available container inventory is lower than demand. Click **Done**.



SEE ALSO:

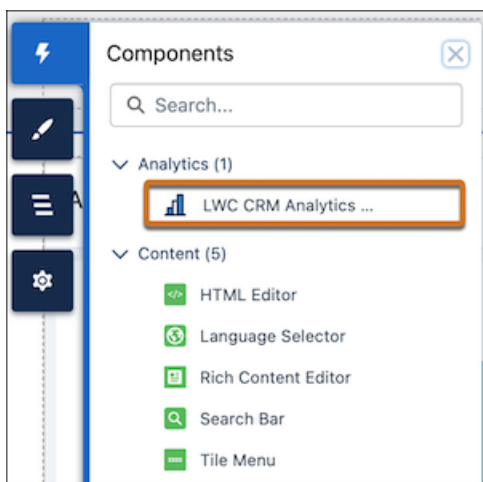
[Salesforce Help: Automatically Highlight Data with Conditional Formatting \(can be outdated or unavailable during release preview\)](#)

Embed CRM Analytics Dashboards in LWR Sites (Generally Available)

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.

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.

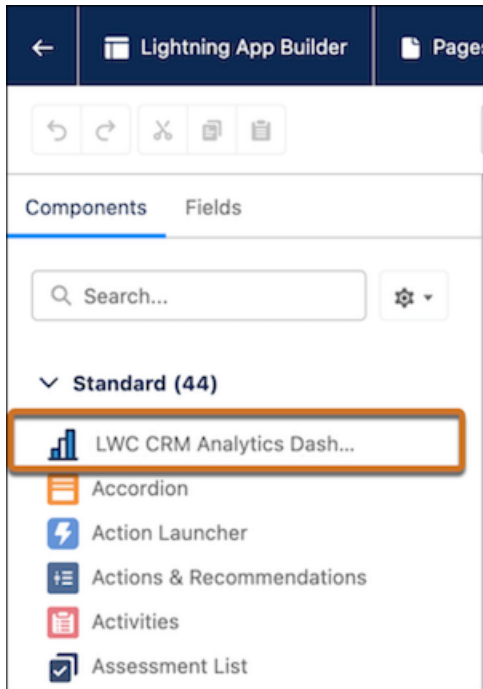


Get More Functionality with the New Dashboard Lightning Web Component (Generally Available)

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. For example, customers can view visualizations of opportunity data alongside their opportunity information.

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

How: Open Lightning App Builder for the page you want to edit. From the component palette, drag **LWC CRM Analytics Dashboard** onto the page.



Analytics Data Integration

Connect to secure data sources with support for Virtual Private Connections on Snowflake.

IN THIS SECTION:

[Optimize Recipes That Use the Local Salesforce Connection \(Pilot\)](#)

Improve the performance of recipes run after a full local Salesforce object sync by choosing to optimize the synced data.


[Access Your Snowflake Data Using VPC on AWS \(Pilot\)](#)

You can now gain insights into your private Snowflake data in CRM Analytics. Create a remote connection using the Virtual Private Connection (VPC) for Snowflake on AWS connector to sync data from Snowflake to Data Manager. Using the AWS VPC interface endpoints provides secure connectivity to Snowflake internal stages and ensures that data transfer from Snowflake takes place on the AWS internal network and doesn't use the public internet.

Optimize Recipes That Use the Local Salesforce Connection (Pilot)

Improve the performance of recipes run after a full local Salesforce object sync by choosing to optimize the synced data.

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

 **Note:** This feature is 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.

How: In Data Manager, open the Connections option. Under SFDC_LOCAL, click the object that you want to optimize full syncs for. Then, on the Data Sync Settings tab, select **Optimize data sync for future runs**. It's recommended that you use a sandbox environment to test this feature.

SEE ALSO:


[Knowledge Article: Participate in a Salesforce Pilot](#)

[Salesforce Help: Optimize Recipes That Use the Local Salesforce Connection \(Pilot\) \(can be outdated or unavailable during release preview\)](#)

Access Your Snowflake Data Using VPC on AWS (Pilot)

You can now gain insights into your private Snowflake data in CRM Analytics. Create a remote connection using the Virtual Private Connection (VPC) for Snowflake on AWS connector to sync data from Snowflake to Data Manager. Using the AWS VPC interface endpoints provides secure connectivity to Snowflake internal stages and ensures that data transfer from Snowflake takes place on the AWS internal network and doesn't use the public internet.

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

 **Note:** This feature is not generally available and is being piloted with certain Customers subject to additional terms and conditions. It is not part of your purchased Services. This feature is subject to change, may be discontinued with no notice at any time in 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.

How: From Setup, in the Quick Find box, enter *Private*, and select **Private Connect**. Create an outbound connection, and then on the Named Credentials page create external credentials and named credentials. In Data Manager, create a new connection for the Snowflake Private Connector.

SEE ALSO:

[Participate in a Salesforce Pilot](#)

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

CRM Analytics Development

Inspect your Analytics assets and execute queries using the new CRM Analytics Connect API Postman collection.

IN THIS SECTION:[Test CRM Analytics Endpoints in Postman](#)

Develop more quickly with the new CRM Analytics collection in Postman. Test endpoints using your own development environment, and view output instantly. Use these results to help you build your integrations with CRM Analytics.

Test CRM Analytics Endpoints in Postman

Develop more quickly with the new CRM Analytics collection in Postman. Test endpoints using your own development environment, and view output instantly. Use these results to help you build your integrations with CRM Analytics.

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

SEE ALSO:

[Postman for Salesforce Developers: Salesforce CRM Analytics Connect API](#)

[CRM Analytics REST API Developer Guide](#)

Intelligent Analytics Apps

Make data-driven decisions fueled by product, shopper, and inventory insights in Commerce Intelligence. Identify trends in your service operations with insights from Field Service Intelligence.

- [Commerce Intelligence Release Notes](#)
- [Field Service Intelligence Release Notes](#)
- [Revenue Intelligence Release Notes](#)
- [Service Intelligence Release Notes](#)

Einstein Discovery

Externally built models are being retired.

IN THIS SECTION:[Externally Built Models in Einstein Discovery Are Being Retired](#)

After July 31, 2024, you can no longer use externally built machine learning models in Einstein Discovery. Your prediction definitions that use an external model will also fail. Instead, use Einstein Discovery to create a model.

Externally Built Models in Einstein Discovery Are Being Retired

After July 31, 2024, you can no longer use externally built machine learning models in Einstein Discovery. Your prediction definitions that use an external model will also fail. Instead, use Einstein Discovery to create a model.

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

SEE ALSO:

[Create a Model](#)

Tableau

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

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

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

Marketing Cloud Intelligence

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

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

Commerce

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

IN THIS SECTION:

[Salesforce B2B and D2C Commerce](#)

Delight your users and enhance your store's performance with the updated Commerce app. Customize your store in under 30 minutes with the refreshed D2C Store template. Jump-start your promotions with predesigned templates that populate your promotion details. Take advantage of Managed Checkout, included with new D2C stores, for a seamless payment, tax, and shipping setup. Enable automatic index rebuilds for up-to-date product information, and use Data Cloud for Commerce for actionable insights into your ecommerce business. Automate tax calculations and reporting on global payments for a streamlined checkout process with Salesforce Tax Solution.

[Salesforce Order Management](#)

Easily replace shopper and buyer items using enhanced exchanges, now accessible in the UI via flows. Manage orders in bulk with large order support for cancellations, returns, and more.

[Salesforce Payments](#)

Let the Commerce Setup Assistant configure Salesforce Payments, and add a Payments merchant account to your D2C store using Managed Checkout. Streamline how registered customers make purchases with one-click checkout. Get Pay Now with a new Salesforce Payments license that's independent of a Commerce license.

Salesforce B2B and D2C Commerce

Delight your users and enhance your store's performance with the updated Commerce app. Customize your store in under 30 minutes with the refreshed D2C Store template. Jump-start your promotions with predesigned templates that populate your promotion details. Take advantage of Managed Checkout, included with new D2C stores, for a seamless payment, tax, and shipping setup. Enable automatic index rebuilds for up-to-date product information, and use Data Cloud for Commerce for actionable insights into your ecommerce business. Automate tax calculations and reporting on global payments for a streamlined checkout process with Salesforce Tax Solution.

IN THIS SECTION:

[Switch to an Improved Merchant Experience with the Refreshed Commerce App](#)

The refreshed Commerce app includes a redesigned landing page for store home, is easier to navigate, and improves access to your store's data and content with revamped workspaces. Easily move between stores, and use the new store switcher dropdown to create a store. Preview and activate your store using the new quick access buttons without going through Experience Builder or store settings. New Summer '24 customers automatically receive the refreshed app. If you're an existing customer, you can make the switch at your convenience.

[Improve the Look and Feel of Your Store with the Refreshed D2C Template](#)

Create a new store with the refreshed D2C Store template, which includes updated styling, fonts, and colors to create a cohesive and visually pleasing experience for your customers. Grab your visitors' attention with the new banner on the Home page, and the refreshed layout provides better organization and presentation of your products and content.

[Commerce Einstein](#)

Turn on Semantic Search on the Commerce Einstein page to improve relevance, reduce "no results found" pages, lower bounce rates, and increase conversion rates.

[Commerce Setup](#)

Set up a store quickly using tailored guided setup steps and an updated Commerce setup assistant. Activate and publish the store without a custom domain. Streamline store creation with smart defaults, and easily set up person accounts. Guest access is automatically enabled when the store is created, and you can share feedback on the setup experience. Import attachments along with product data.

[Commerce Cart and Checkout](#)

Quickly configure checkout services for a D2C store to streamline your store setup. Improve the shopping flow, and keep your customers engaged with a simple add-to-cart message. Show the precise price breakdown in carts so shoppers know what they're paying for. Offer shoppers the ability to enter coupons during checkout for more options and incentives to complete their purchase. Make it easier for shoppers to complete their purchases with a guided flow and a dynamic cart summary displayed at checkout. Give shoppers confidence when selecting shipping options with estimated delivery dates at checkout.

[Commerce Search](#)

Automatically rebuild your search index to ensure that your customers always view the most up-to-date product and catalog information in their search results. Improve store performance and page load times on search, product, cart, and checkout pages with default displayable product fields. Sort search and category pages by product SKU. Adjust column and spacing settings for product cards and get more category, filter, and sort options on the redesigned product list page.

[Data Cloud for Commerce](#)

Harness the power of near real-time analytics with Data Cloud for Commerce. Intelligent analytics dashboards for product, shopper, and inventory insights provide key performance indicators to help make data-driven decisions that grow revenue and improve efficiency. Use the new Omichannel Inventory Connector to bring your inventory data into Data Cloud, and deliver personalized shopping experiences to your customers.

Commerce Promotions

Rev up your promotions with templates that make it easy to create enticing deals for your customers. Offer shipping promotions to drive sales and encourage customers to complete their purchases. Enjoy the flexibility of updating an active promotion. Make your promotions stand out by displaying pricing on Product Card components with customizable text colors. Combine promotions for a total percentage discount to keep things tidy.

Commerce Components

Showcase your content on your Commerce LWR store with the Carousel component. Easily integrate links to popular social media platforms into your Commerce LWR store with the Social Links component. Enhance your customers' shopping experience with the upgraded Order History component, now featuring product images to help them track their purchases.

Commerce Store Management

In the refreshed Commerce app, Goals and Recommendations has moved into the Insights and Actions workspace. Use the new History table to see details of a specific action and the output, such as a new promotion. The table shows only the actions that were taken for the selected goal. Get more ideas about how to improve your store's performance with more recommended actions.

Commerce Dashboards

Gain valuable insights into the health and performance of your store's payment transactions with the Commerce Payments Dashboard. Take advantage of the Promotions Dashboard to view coupon offerings and discount campaigns to create data-driven strategies to optimize and enhance customer acquisition, engagement, and retention. Monitor your store's financial health with the Commerce Finance Dashboard, which provides a comprehensive view of your sales, taxes, and shipping charges.

Additional Commerce Features

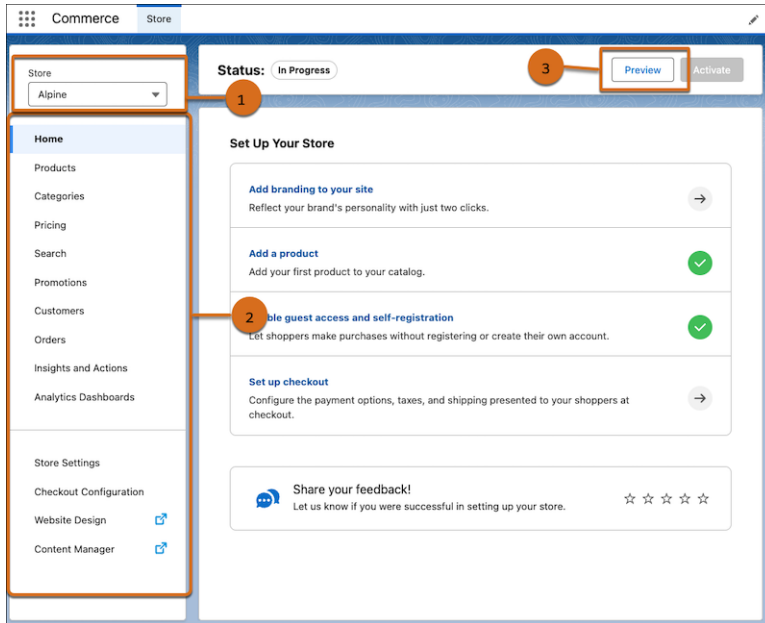
Calculate, collect, and report tax on global payments automatically with the Salesforce Tax Solution. Add a product to up to five categories in your store and preview the results without leaving the add product page. Personalize your customers' shopping experience by combining Data Cloud segments and Commerce buyer groups. Create shopper profiles using a wide range of customer data available in Data Cloud.

Switch to an Improved Merchant Experience with the Refreshed Commerce App

The refreshed Commerce app includes a redesigned landing page for store home, is easier to navigate, and improves access to your store's data and content with revamped workspaces. Easily move between stores, and use the new store switcher dropdown to create a store. Preview and activate your store using the new quick access buttons without going through Experience Builder or store settings. New Summer '24 customers automatically receive the refreshed app. If you're an existing customer, you can make the switch at your convenience.

Where: This change applies to B2B Commerce and D2C Commerce in Enterprise, Unlimited, and Developer editions.

How: Move through the app with ease using persistent left navigation (2), which keeps you on track with access to all the functions and features. The navigation is always available under the Store tab (1). Preview the store by clicking Preview (3).



You can also customize the app by adding items to the navigation or by using the Lightning App Builder to tailor your record pages.

SEE ALSO:

[Salesforce Help: Enable the Refreshed Commerce App \(can be outdated or unavailable during release preview\)](#)

Improve the Look and Feel of Your Store with the Refreshed D2C Template

Create a new store with the refreshed D2C Store template, which includes updated styling, fonts, and colors to create a cohesive and visually pleasing experience for your customers. Grab your visitors' attention with the new banner on the Home page, and the refreshed layout provides better organization and presentation of your products and content.

Where: This change applies to D2C Commerce in Enterprise, Unlimited, and Developer editions.

How: From the Commerce Setup Assistant, click **Start Selling Online**, and select the refreshed D2C Store template.

SEE ALSO:

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

Commerce Einstein

Turn on Semantic Search on the Commerce Einstein page to improve relevance, reduce "no results found" pages, lower bounce rates, and increase conversion rates.

IN THIS SECTION:

[Improve Search Results with Einstein Semantic Search](#)

Turn on semantic search to improve relevance, reduce "no results found" pages, lower bounce rates, and increase conversion rates. Einstein semantic search accounts for synonyms, alternate spellings, abbreviations, typos, and product themes, improving your search results.

Enable Einstein Semantic Search in APAC Regions

Improve relevance, reduce “no results found” pages, lower bounce rates, and increase conversion rates with semantic search. Einstein semantic search considers synonyms, alternate spellings, abbreviations, typos, and product themes, improving your search results.

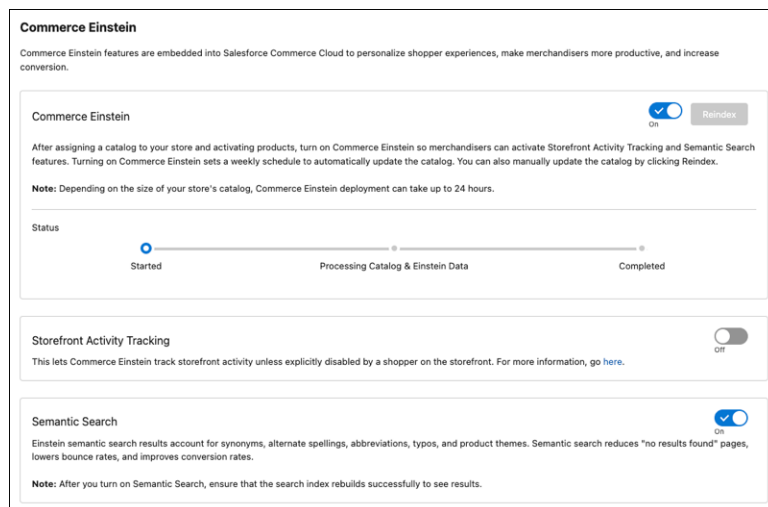
Improve Search Results with Einstein Semantic Search

Turn on semantic search to improve relevance, reduce “no results found” pages, lower bounce rates, and increase conversion rates. Einstein semantic search accounts for synonyms, alternate spellings, abbreviations, typos, and product themes, improving your search results.

Where: This change applies to B2B Commerce and D2C Commerce in Enterprise, Unlimited, and Developer editions.

When: Semantic search is available in North America and Europe and will be available in the Asia-Pacific region in Summer '24.

How: From Store Settings, select **Commerce Einstein**, and then turn on **Commerce Einstein** and **Semantic Search**. Rebuild your search index to start seeing results.



SEE ALSO:

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

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

[Salesforce Help: AI-Powered Search for Commerce \(can be outdated or unavailable during release preview\)](#)

Enable Einstein Semantic Search in APAC Regions

Improve relevance, reduce “no results found” pages, lower bounce rates, and increase conversion rates with semantic search. Einstein semantic search considers synonyms, alternate spellings, abbreviations, typos, and product themes, improving your search results.

Where: This change applies to B2B Commerce and D2C Commerce in Enterprise, Unlimited, and Developer editions.

How: Select a store, and click **Settings**. Select **Commerce Einstein**, and then turn on **Commerce Einstein** and **Semantic Search**. Rebuild your search index to start seeing results.

Commerce Einstein

Commerce Einstein features are embedded into Salesforce Commerce Cloud to personalize shopper experiences, make merchandisers more productive, and increase conversion.

Commerce Einstein On Reindex

After assigning a catalog to your store and activating products, turn on Commerce Einstein so merchandisers can activate Storefront Activity Tracking and Semantic Search features. Turning on Commerce Einstein sets a weekly schedule to automatically update the catalog. You can also manually update the catalog by clicking Reindex.

Note: Depending on the size of your store's catalog, Commerce Einstein deployment can take up to 24 hours.

Status

Started

Processing Catalog & Einstein Data

Completed

Storefront Activity Tracking Off

This lets Commerce Einstein track storefront activity unless explicitly disabled by a shopper on the storefront. For more information, go [here](#).

Semantic Search On

Einstein semantic search results account for synonyms, alternate spellings, abbreviations, typos, and product themes. Semantic search reduces "no results found" pages, lowers bounce rates, and improves conversion.

Note: After you turn on Semantic Search, ensure that the search index updates successfully to see results.

SEE ALSO:

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

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

[Salesforce Help: AI-Powered Search for Commerce \(can be outdated or unavailable during release preview\)](#)

Commerce Setup

Set up a store quickly using tailored guided setup steps and an updated Commerce setup assistant. Activate and publish the store without a custom domain. Streamline store creation with smart defaults, and easily set up person accounts. Guest access is automatically enabled when the store is created, and you can share feedback on the setup experience. Import attachments along with product data.

IN THIS SECTION:

[Use Tailored Guided Steps for Quick Store Setup](#)

Get started with your store in under 30 minutes. Customize it further with intelligent tasks, and get your orders rolling faster with the enhanced store setup experience. The required guided tasks, which are curated based on your selling channel, are marked complete as you go—you no longer need manual clicks to indicate that they're done. After all the tasks are complete, you can preview and activate your store. If you're using the refreshed Commerce app, you can preview and activate directly from the new store home page and avoid navigating to multiple pages.

[Get Set Up Quicker with the Updated Commerce Assistant](#)

Experience a faster setup process, reduced manual effort, and increased efficiency with the latest enhancements to the Commerce Setup Assistant. Take advantage of one-click automated setup of Payments, Order Management, Reports and Dashboards, and Omnichannel Inventory. You can also enable guest shoppers to visit the store and purchase products with a one-click person account setup. If you've already set up Commerce, run the setup assistant to update settings with optimized values.

[Configure Commerce with the Enhanced Setup Assistant](#)

Get a more streamlined experience with the revamped Commerce Setup Assistant. The Assistant walks you through basic setup and installs the essential settings and page layouts. If setup fails or only partially completes, the Assistant also provides troubleshooting guidance.

[Activate and Publish a Store Without a Custom Domain](#)

Now you can activate your Commerce store to share it with colleagues or see what the store looks like before setting up your custom domain. Then when you're ready to go live, configure the CDN and custom domain to provide optimal performance, scalability, and security. We've also expanded the activate function so that when you activate the store, the store also gets published.

[Streamline Store Creation with Smart Defaults](#)

When you create a D2C store using the channel creation wizard, if person accounts are enabled, the guest access and self-registration options are now enabled. And, all new D2C stores are also set up with Managed Checkout, a unified checkout experience that uses Salesforce native services for payments, taxes, and shipping.

[Set Up Person Accounts with One Click](#)

Set up person accounts in B2B Commerce and D2C Commerce with just one click. Person accounts represent the customers who visit the store and make purchases, making the shopping experience more convenient and seamless.

[Share Your Store Setup Experience with In-App Feedback](#)

Help us create the best store setup experience by providing feedback directly while you're setting up your store. Rate your store setup experience at any time, and help us understand what is working well and where we can improve.

[Guest Access to D2C Stores Is Automatically Enabled](#)

You no longer need to manually turn on guest access when a D2C store is created. Your guests can browse, make purchases, and get a hassle-free shopping experience the moment that your store is active. After guest access is enabled automatically, the Guest User profile is created, sharing settings are turned on, and person accounts is mapped as the default record type.

[Include Attachments When Importing Products](#)

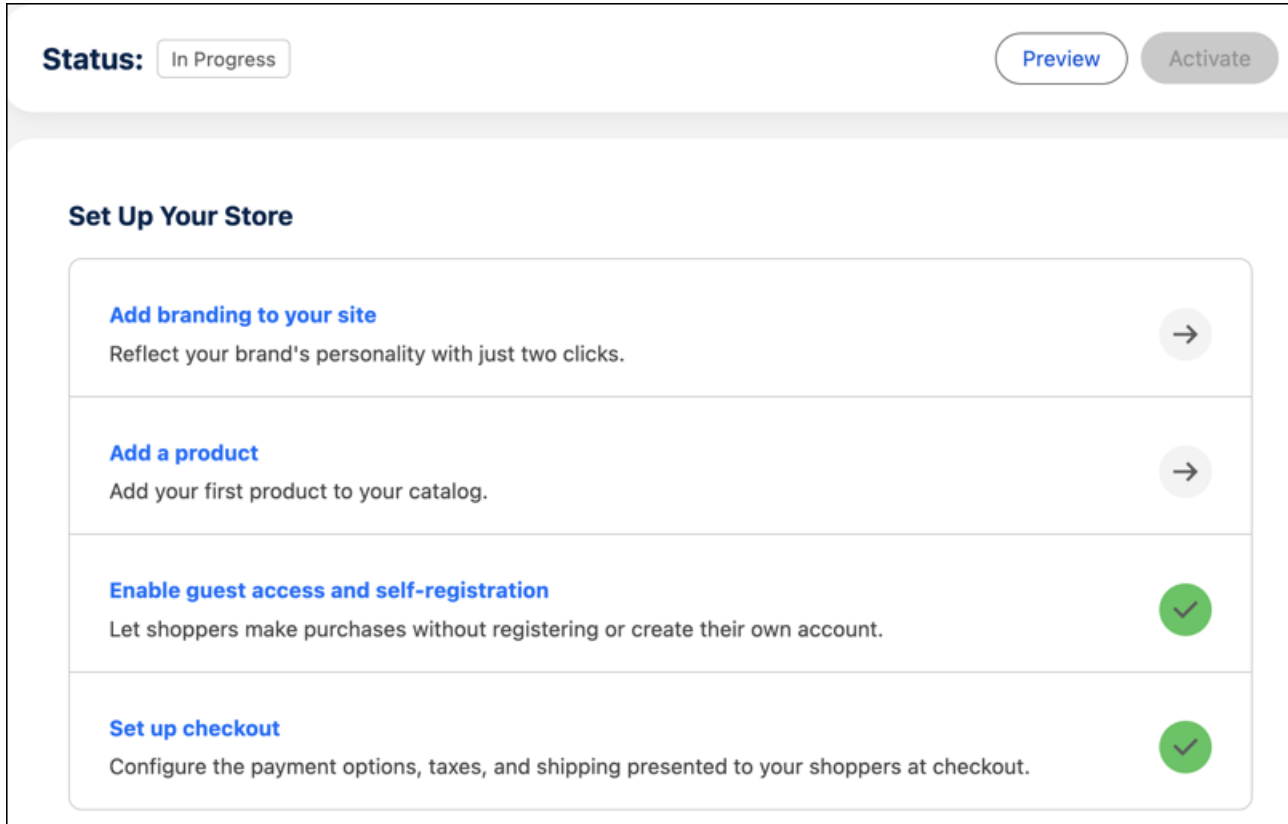
Bring all your product information together in one place. Now you can import PDF files and other attachments that you want to provide with your products along with the product data when you import a CSV file. Create a CSV file that references the attachments and then import the file from the Product Workspace.

Use Tailored Guided Steps for Quick Store Setup

Get started with your store in under 30 minutes. Customize it further with intelligent tasks, and get your orders rolling faster with the enhanced store setup experience. The required guided tasks, which are curated based on your selling channel, are marked complete as you go—you no longer need manual clicks to indicate that they're done. After all the tasks are complete, you can preview and activate your store. If you're using the refreshed Commerce app, you can preview and activate directly from the new store home page and avoid navigating to multiple pages.

Where: This change applies to B2B Commerce, D2C Commerce, and Reorder Portal in Enterprise, Unlimited, and Developer editions.

How: On your store home page, complete all the tasks that are displayed based on the selling channel. This image shows the store home page for a D2C store.



SEE ALSO:

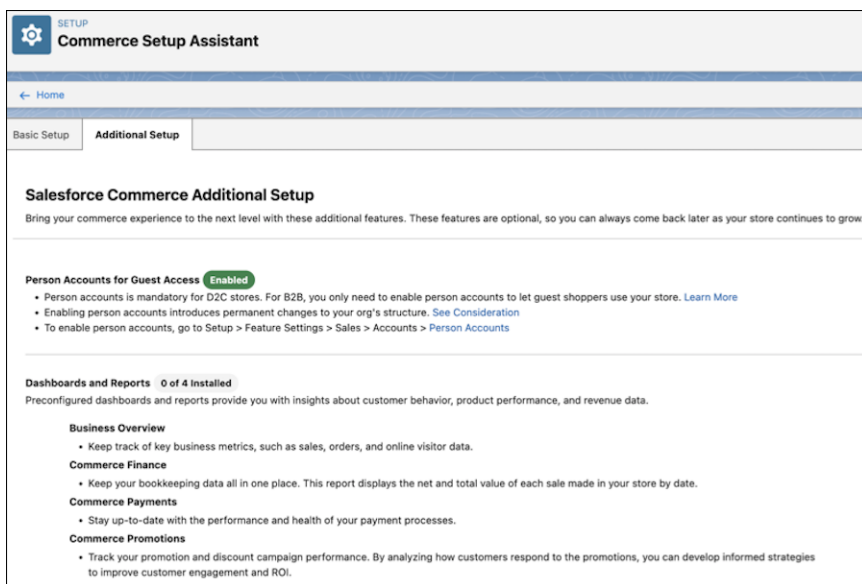
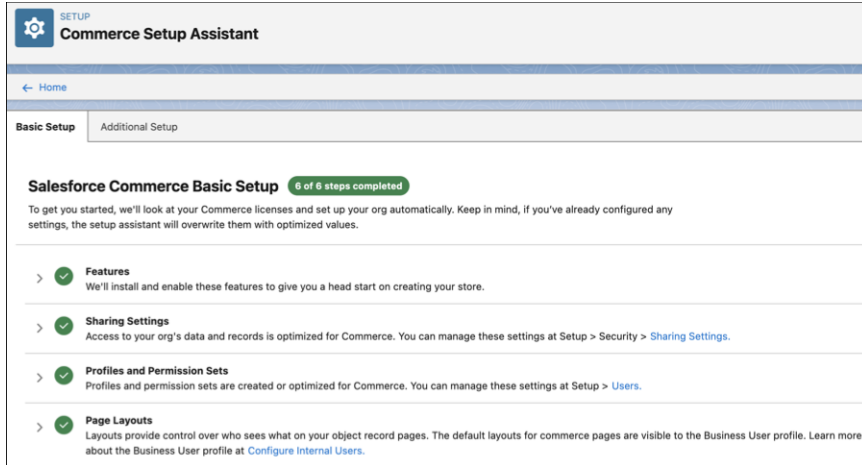
[Salesforce Help: Commerce Store Setup Tasks \(can be outdated or unavailable during release preview\)](#)

Get Set Up Quicker with the Updated Commerce Assistant

Experience a faster setup process, reduced manual effort, and increased efficiency with the latest enhancements to the Commerce Setup Assistant. Take advantage of one-click automated setup of Payments, Order Management, Reports and Dashboards, and Omnichannel Inventory. You can also enable guest shoppers to visit the store and purchase products with a one-click person account setup. If you've already set up Commerce, run the setup assistant to update settings with optimized values.

Where: This change applies to B2B Commerce and D2C Commerce in Enterprise, Unlimited, and Developer editions.

How: From Salesforce Setup, access the Commerce Setup Assistant. On the Salesforce Commerce Setup tile, click **Get Started**.



Watch a video overview of the Commerce store setup process.

 [Watch a video](#)

SEE ALSO:

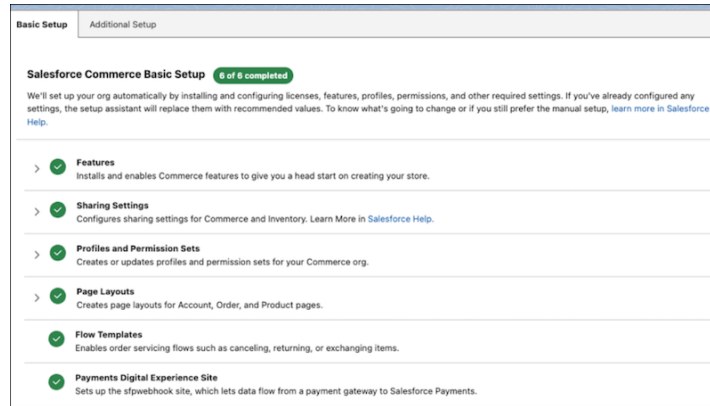
[Salesforce Help: Prepare Your Org for Commerce \(can be outdated or unavailable during release preview\)](#)

Configure Commerce with the Enhanced Setup Assistant

Get a more streamlined experience with the revamped Commerce Setup Assistant. The Assistant walks you through basic setup and installs the essential settings and page layouts. If setup fails or only partially completes, the Assistant also provides troubleshooting guidance.

Where: This change applies to B2B Commerce and D2C Commerce in Enterprise, Unlimited, and Developer editions.

How: From Salesforce Setup, open the Commerce Setup Assistant, and click **Get Started**.



SEE ALSO:

[Salesforce Help: Commerce Setup Assistant](#)

Activate and Publish a Store Without a Custom Domain

Now you can activate your Commerce store to share it with colleagues or see what the store looks like before setting up your custom domain. Then when you're ready to go live, configure the CDN and custom domain to provide optimal performance, scalability, and security. We've also expanded the activate function so that when you activate the store, the store also gets published.

Where: This change applies to B2B Commerce and D2C Commerce in Enterprise, Unlimited, and Developer editions.

SEE ALSO:

[Salesforce Help: Activate Your Store \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Configure a Custom Domain and CDN \(can be outdated or unavailable during release preview\)](#)

Streamline Store Creation with Smart Defaults

When you create a D2C store using the channel creation wizard, if person accounts are enabled, the guest access and self-registration options are now enabled. And, all new D2C stores are also set up with Managed Checkout, a unified checkout experience that uses Salesforce native services for payments, taxes, and shipping.

Where: This change applies to B2B Commerce and D2C Commerce in Enterprise, Unlimited, and Developer editions.

Who: This feature is available only with the External Apps license.

SEE ALSO:

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

[Automate Your Shipping Setup with Managed Checkout](#)

Set Up Person Accounts with One Click

Set up person accounts in B2B Commerce and D2C Commerce with just one click. Person accounts represent the customers who visit the store and make purchases, making the shopping experience more convenient and seamless.

Where: This change applies to B2B Commerce and D2C Commerce in Enterprise, Unlimited, and Developer editions.

How: From Salesforce Setup, access the Commerce Setup Assistant. On the Salesforce Commerce Setup tile, click **Get Started**. Go to the Additional Setup tab, and for Person Accounts for Guest Access, click **Get Started**.

SEE ALSO:

[Salesforce Help: Prepare Your Org for Commerce \(can be outdated or unavailable during release preview\)](#)

Share Your Store Setup Experience with In-App Feedback

Help us create the best store setup experience by providing feedback directly while you're setting up your store. Rate your store setup experience at any time, and help us understand what is working well and where we can improve.

Where: This change applies to B2B Commerce and D2C Commerce in Enterprise, Unlimited, and Developer editions.

SEE ALSO:

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

Guest Access to D2C Stores Is Automatically Enabled

You no longer need to manually turn on guest access when a D2C store is created. Your guests can browse, make purchases, and get a hassle-free shopping experience the moment that your store is active. After guest access is enabled automatically, the Guest User profile is created, sharing settings are turned on, and person accounts is mapped as the default record type.

Where: This change applies to D2C Commerce in Enterprise, Unlimited, and Developer editions.

SEE ALSO:

[Salesforce Help: Prepare Your Org for Commerce \(can be outdated or unavailable during release preview\)](#)

Include Attachments When Importing Products

Bring all your product information together in one place. Now you can import PDF files and other attachments that you want to provide with your products along with the product data when you import a CSV file. Create a CSV file that references the attachments and then import the file from the Product Workspace.

Where: This change applies to B2B Commerce and D2C Commerce in Enterprise, Unlimited, and Developer editions.

SEE ALSO:

[Salesforce Help: Import and Export Commerce Data \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: CSV File Format for Importing Data Globally \(can be outdated or unavailable during release preview\)](#)

Commerce Cart and Checkout

Quickly configure checkout services for a D2C store to streamline your store setup. Improve the shopping flow, and keep your customers engaged with a simple add-to-cart message. Show the precise price breakdown in carts so shoppers know what they're paying for. Offer shoppers the ability to enter coupons during checkout for more options and incentives to complete their purchase. Make it easier for shoppers to complete their purchases with a guided flow and a dynamic cart summary displayed at checkout. Give shoppers confidence when selecting shipping options with estimated delivery dates at checkout.

IN THIS SECTION:

[Set Up Checkout Details Quickly with Managed Checkout for D2C Stores](#)

Take advantage of Managed Checkout, a unified setup experience supported by Salesforce's native services for payments, taxes, and shipping that's included with new D2C stores. Many tasks are automated with smart defaults and consolidated on one page so that you can configure checkout in just a few clicks. Managed Checkout provides an optimized checkout experience for shoppers, including one-click checkout.

[Automate Your Shipping Setup with Managed Checkout](#)

Managed Checkout for new D2C stores uses the Salesforce native shipping service, which includes a default shipping profile. The shipping profile uses a shipping zone based on your store's default ship-to country, a free-shipping rate, and shipping processing time.

[Provide Shoppers Estimated Delivery Dates at Checkout](#)

Add confidence to the shopping experience by letting customers know during checkout when to expect delivery. The estimated delivery date for each shipping option displays as "Arrives: [Date]".

[Improve the Shopping Experience with an Add-to-Cart Success Message](#)

Let customers know they've successfully added an item to their cart so that they can continue shopping. The add-to-cart success toast requires no action from your customer, allowing them to continue their shopping experience uninterrupted.

[Show the Precise Price Breakdown in the Cart Summary](#)

Provide shoppers a clear understanding of the final price displayed in the cart summary. The subtotal line includes the total for all cart items and any item-level promotions applied to individual products. The promotions field only includes cart-level promotions applied to the total transaction. All promotions display below the cart summary.

[Give Shoppers More Options with Coupons at Checkout](#)

Let shoppers apply coupon codes and view promotions during checkout. Use the Promotions component on the checkout page to display applied promotions and show a field to enter coupon codes.

[Improve Checkout with a Guided Flow](#)

Provide shoppers an optimized checkout experience using an accordion-style, guided flow that incorporates checkout summary information. New D2C stores include the new component on the checkout page by default. If you have an existing store, you can replace your current layout.

[Dynamically Display Cart Information at Checkout](#)

Display the cart summary, promotions, and cart items in a dynamic component that expands and collapses on mobile. Use the Checkout Summary component on the cart or checkout page to show a summary of cart-related information. The component stays pinned to the right side of the page so that customers can always view the information without scrolling or moving to a different page.

Set Up Checkout Details Quickly with Managed Checkout for D2C Stores

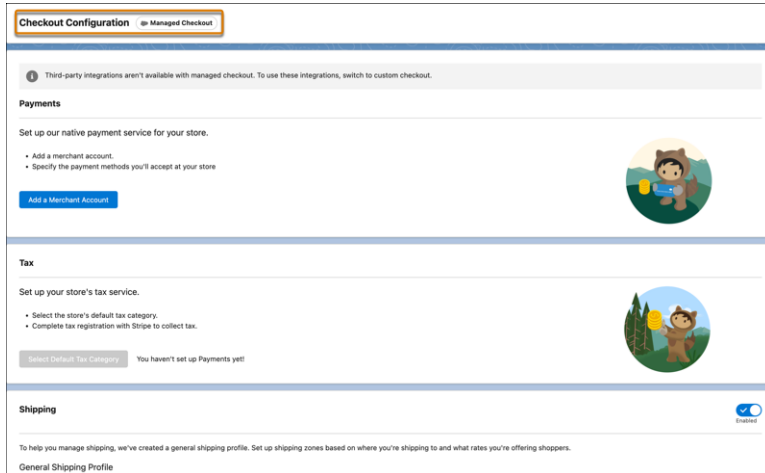
Take advantage of Managed Checkout, a unified setup experience supported by Salesforce's native services for payments, taxes, and shipping that's included with new D2C stores. Many tasks are automated with smart defaults and consolidated on one page so that you can configure checkout in just a few clicks. Managed Checkout provides an optimized checkout experience for shoppers, including one-click checkout.

Where: This change applies to D2C Commerce in Enterprise, Unlimited, and Developer editions. Managed Checkout requires Salesforce Payments. Managed Checkout doesn't support subscriptions.

Why: Watch the video to learn about the benefits of Managed Checkout.

 [Watch a video](#)

How: To view your checkout setup, go to the Checkout Configuration page in your store settings.



SEE ALSO:

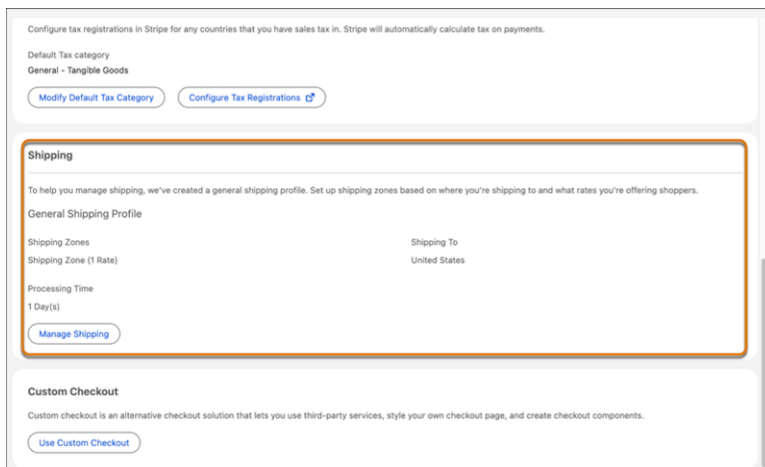
[Salesforce Help: Checkout Configuration for a Commerce Store \(can be outdated or unavailable during release preview\)](#)

Automate Your Shipping Setup with Managed Checkout

Managed Checkout for new D2C stores uses the Salesforce native shipping service, which includes a default shipping profile. The shipping profile uses a shipping zone based on your store's default ship-to country, a free-shipping rate, and shipping processing time.

Where: This change applies to D2C Commerce in Enterprise, Unlimited, and Developer editions.

How: To view and manage your shipping profile, on the Checkout Configuration page in your store settings, go to the Shipping section.



SEE ALSO:

[Set Up Checkout Details Quickly with Manged Checkout for D2C Stores](#)

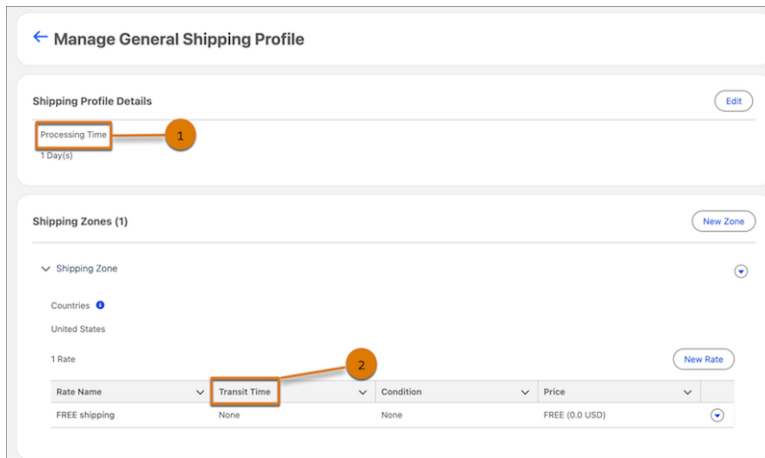
[Salesforce Help: Set Up Salesforce Native Shipping for a Commerce Store \(can be outdated or unavailable during release preview\)](#)

Provide Shoppers Estimated Delivery Dates at Checkout

Add confidence to the shopping experience by letting customers know during checkout when to expect delivery. The estimated delivery date for each shipping option displays as "Arrives: [Date]".

Where: This change applies to B2B and D2C Commerce in Enterprise, Unlimited, and Developer editions.

How: To calculate estimated delivery dates, in the Shipping section of the Checkout Configuration page, set your processing time (1) and transit time (2) for each shipping rate.



SEE ALSO:

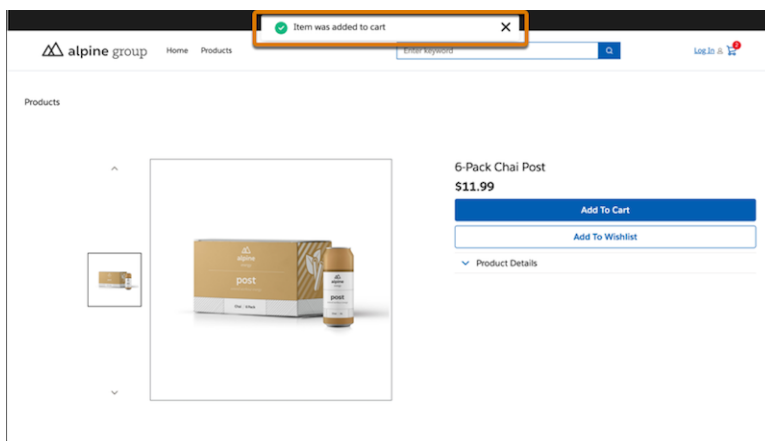
[Salesforce Help: Set Up Salesforce Native Shipping for a Commerce Store \(can be outdated or unavailable during release preview\)](#)

Improve the Shopping Experience with an Add-to-Cart Success Message

Let customers know they've successfully added an item to their cart so that they can continue shopping. The add-to-cart success toast requires no action from your customer, allowing them to continue their shopping experience uninterrupted.

Where: This change applies to B2B and D2C Commerce in Enterprise, Unlimited, and Developer editions.

How: This feature is included by default when creating a store. If you have an existing store, republish your site to add the toast message.



SEE ALSO:

[Improve the Look and Feel of Your Store with the Refreshed D2C Template](#)

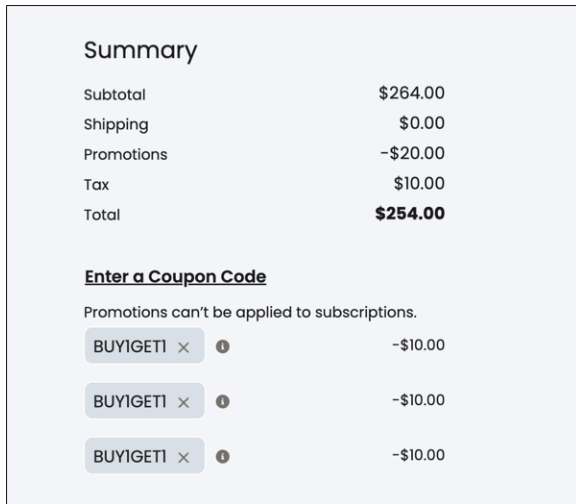
[Improve Checkout with a Guided Flow](#)

Show the Precise Price Breakdown in the Cart Summary

Provide shoppers a clear understanding of the final price displayed in the cart summary. The subtotal line includes the total for all cart items and any item-level promotions applied to individual products. The promotions field only includes cart-level promotions applied to the total transaction. All promotions display below the cart summary.

Where: This change applies to B2B and D2C Commerce in Enterprise, Unlimited, and Developer editions.

How: This feature is included by default when creating a store. If you have an existing store, republish your site to add the pricing details.



The screenshot shows a 'Summary' section with a price breakdown and a coupon code section. The price breakdown includes Subtotal (\$264.00), Shipping (\$0.00), Promotions (-\$20.00), Tax (\$10.00), and Total (\$254.00). Below this is a section titled 'Enter a Coupon Code' with a note that promotions can't be applied to subscriptions. Three 'BUYIGETI' coupons are shown, each with a value of -\$10.00.

Summary	
Subtotal	\$264.00
Shipping	\$0.00
Promotions	-\$20.00
Tax	\$10.00
Total	\$254.00

Enter a Coupon Code

Promotions can't be applied to subscriptions.

BUYIGETI x	-\$10.00
BUYIGETI x	-\$10.00
BUYIGETI x	-\$10.00

SEE ALSO:

[Improve the Look and Feel of Your Store with the Refreshed D2C Template](#)

[Improve Checkout with a Guided Flow](#)

Give Shoppers More Options with Coupons at Checkout

Let shoppers apply coupon codes and view promotions during checkout. Use the Promotions component on the checkout page to display applied promotions and show a field to enter coupon codes.

Where: This change applies to D2C Commerce in Enterprise, Unlimited, and Developer editions.

How: New D2C stores have the Promotions component included on the checkout page. If you have an existing store, use one of the preset checkout layouts that includes the Promotions component.

Checkout

Contact Information Change

* Email

+1 * Phone Number

[Continue to Shipping Address](#)

Shipping Address Change

Jane Doe Default
 123 Broadway
 New York, NY 10000
 United States
[Edit Address](#)

Summary

Subtotal	\$264.00
Shipping	\$0.00
Promotions	-\$20.00
Tax	\$10.00
Total	\$254.00

Coupon code...

Promotions can't be applied to subscriptions.

BUYGETI x	-\$10.00
BUYGETI x	-\$10.00
BUYGETI x	-\$10.00

[My Cart](#) ^

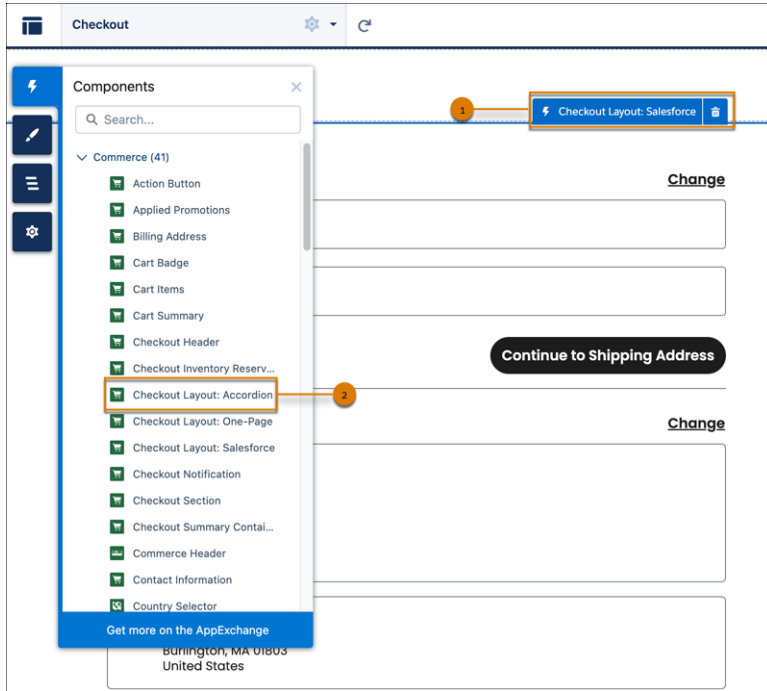
SEE ALSO:[Commerce Promotions](#)[Salesforce Help: Design Your Checkout Page in a Commerce Store \(can be outdated or unavailable during release preview\)](#)

Improve Checkout with a Guided Flow

Provide shoppers an optimized checkout experience using an accordion-style, guided flow that incorporates checkout summary information. New D2C stores include the new component on the checkout page by default. If you have an existing store, you can replace your current layout.

Where: This change applies to B2B and D2C Commerce in Enterprise, Unlimited, and Developer editions.

How: If you have an existing store, replace your current layout with the Checkout Layout: Salesforce component (1). For new or existing stores without a Salesforce Payments license, add the Checkout Layout: Accordion (2) component to your page.



SEE ALSO:

[Improve the Look and Feel of Your Store with the Refreshed D2C Template](#)

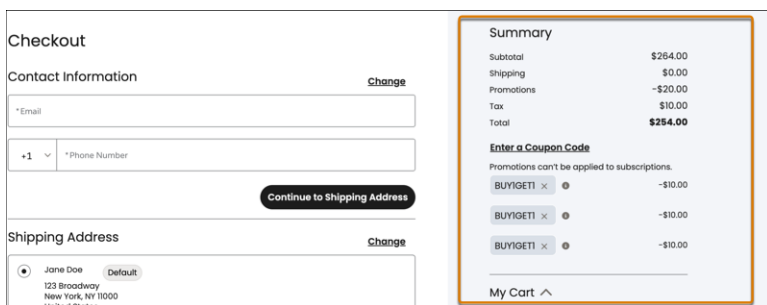
[Salesforce Help: Design Your Checkout Page in a Commerce Store \(can be outdated or unavailable during release preview\)](#)

Dynamically Display Cart Information at Checkout

Display the cart summary, promotions, and cart items in a dynamic component that expands and collapses on mobile. Use the Checkout Summary component on the cart or checkout page to show a summary of cart-related information. The component stays pinned to the right side of the page so that customers can always view the information without scrolling or moving to a different page.

Where: This change applies to D2C Commerce in Enterprise, Unlimited, and Developer editions.

How: New D2C stores include the Checkout Summary component on the Salesforce Checkout layout page. If you're designing your own checkout page, remove the individual Cart Summary, Promotions, and Cart Items components and drag the Checkout Summary component onto your checkout page.



SEE ALSO:

[Salesforce Help: Design Your Checkout Page in a Commerce Store \(can be outdated or unavailable during release preview\)](#)

Commerce Search

Automatically rebuild your search index to ensure that your customers always view the most up-to-date product and catalog information in their search results. Improve store performance and page load times on search, product, cart, and checkout pages with default displayable product fields. Sort search and category pages by product SKU. Adjust column and spacing settings for product cards and get more category, filter, and sort options on the redesigned product list page.

IN THIS SECTION:

[Automatically Rebuild Your Search Index](#)

Enable automatic index rebuilds on the redesigned search index summary page to ensure that your customers always view the most up-to-date product and catalog information in their search results. Automatic rebuild checks for product and catalog updates every 5 minutes and rebuilds the index if necessary. The Rebuild Log also gives you insight into index and product errors that occurred during indexing, providing you with increased visibility into the status of your index.

[Get Improved Page Performance with Displayable Product Fields \(Beta\)](#)

When you create a new store, the Category Description, Category Name, Family (Product), Product Code, Product Description, Product Name, and Product SKU fields are now configured as displayable product fields. Displayable product fields improve your store performance and page load times on search, product, cart, and checkout pages. If you have an existing store, you can add the fields to see improvements.

[Sort Products by SKU](#)

Product SKU is now removed as a default sortable product field on search and category pages in new D2C stores to better support customer sort preferences. Sorting search results by Product SKU is more common in B2B stores than in D2C stores. You can continue to manually configure Product SKU as a sortable field in B2B and D2C stores, enabling you to sort results in ascending or descending order to find the products that you're looking for.

[Improve Your Browse Experience with the Redesigned Product List Page](#)

The product list page offers redesigned sort options, category navigation, filter selections, and accordion dropdown menus to collapse and expand filter sections. In B2B stores, the responsive behavior in the Results component is now updated and no longer includes the Grid Max Columns Displayed field. In D2C stores, configure the new Results Grid component to adjust column and spacing settings and customize how your product cards display.

Automatically Rebuild Your Search Index

Enable automatic index rebuilds on the redesigned search index summary page to ensure that your customers always view the most up-to-date product and catalog information in their search results. Automatic rebuild checks for product and catalog updates every 5 minutes and rebuilds the index if necessary. The Rebuild Log also gives you insight into index and product errors that occurred during indexing, providing you with increased visibility into the status of your index.

Where: This change applies to B2B Commerce and D2C Commerce in Enterprise, Unlimited, and Developer editions.

How: From your store's search page, click **Search Index Summary**, and then turn on Rebuild Automatically.

Search Index Summary						
Searchable Fields		Results Filters	Sort Rules	Boost and Bury Rules	Results Display Settings	
Search Index Summary Rebuild Automatically <input checked="" type="checkbox"/> Rebuild Now Refresh Status						
Every time you update product information, rebuild your index. This ensures that search results always have the most up-to-date information.						
Created	Updated	Current Issues	Rebuild Status			
Apr 01, 2024, 01:33 PM	There are no partial updates.	There are no issues.	There's no index rebuild in progress.			
Rebuild Log Last 14 Rebuilds						
Rebuild Type	Status	Error	Product Updates	User	Start Time	Total Time
Full (Manual)	✓		46	epic.75b0b64c25b9@...	Apr 1, 2024, 01:32 PM	0hr 1min
Full (Manual)	✓		46	epic.75b0b64c25b9@...	Mar 28, 2024, 03:11 PM	0hr 1min
Full (Manual)	✗	There are no searchable products for this store. Make sure your store has at least one active product marked as searchable, and try again.	0	epic.75b0b64c25b9@...	Mar 28, 2024, 03:11 PM	0hr 1min
Partial	✓		46	Automatic Rebuild	Mar 28, 2024, 01:39 PM	0hr 1min
Partial (Manual)	✓		0	epic.75b0b64c25b9@...	Mar 27, 2024, 09:44 AM	0hr 1min

SEE ALSO:

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

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

Get Improved Page Performance with Displayable Product Fields (Beta)

When you create a new store, the Category Description, Category Name, Family (Product), Product Code, Product Description, Product Name, and Product SKU fields are now configured as displayable product fields. Displayable product fields improve your store performance and page load times on search, product, cart, and checkout pages. If you have an existing store, you can add the fields to see improvements.

Where: This change applies to B2B Commerce and D2C Commerce in Enterprise, Unlimited, and Developer editions.



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

SEE ALSO:

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

[Salesforce Help: Product and Product Category Standard Fields \(can be outdated or unavailable during release preview\)](#)

Sort Products by SKU

Product SKU is now removed as a default sortable product field on search and category pages in new D2C stores to better support customer sort preferences. Sorting search results by Product SKU is more common in B2B stores than in D2C stores. You can continue to manually configure Product SKU as a sortable field in B2B and D2C stores, enabling you to sort results in ascending or descending order to find the products that you're looking for.

Where: This change applies to D2C Commerce in Enterprise, Unlimited, and Developer editions.

SEE ALSO:

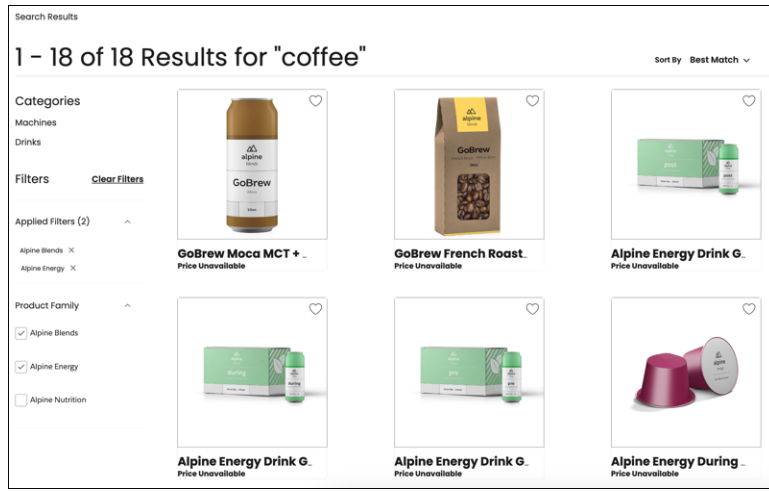
[Salesforce Help: Product and Product Category Standard Fields \(can be outdated or unavailable during release preview\)](#)

Improve Your Browse Experience with the Redesigned Product List Page

The product list page offers redesigned sort options, category navigation, filter selections, and accordion dropdown menus to collapse and expand filter sections. In B2B stores, the responsive behavior in the Results component is now updated and no longer includes the Grid Max Columns Displayed field. In D2C stores, configure the new Results Grid component to adjust column and spacing settings and customize how your product cards display.

Where: This change applies to B2B Commerce and D2C Commerce in Enterprise, Unlimited, and Developer editions.

How: Open the search page in Experience Builder to view the redesigned product list page.



SEE ALSO:

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

[Salesforce Help: Configure Product Cards to Display on the Product List Page \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Configure How Product Cards Are Displayed on the Product List Page \(can be outdated or unavailable during release preview\)](#)

Data Cloud for Commerce

Harness the power of near real-time analytics with Data Cloud for Commerce. Intelligent analytics dashboards for product, shopper, and inventory insights provide key performance indicators to help make data-driven decisions that grow revenue and improve efficiency. Use the new Omichannel Inventory Connector to bring your inventory data into Data Cloud, and deliver personalized shopping experiences to your customers.

IN THIS SECTION:

[Drive Business Insights and Grow Revenue with Data Cloud for Commerce](#)

Data Cloud for Commerce uses the power of Data Cloud and CRM Analytics to provide a data-driven solution that offers important and actionable insights into your ecommerce business. The combination of customer data, key performance indicators (KPIs), and easy-to-understand data visualizations can help you improve store performance and the shopper experience.

[Get Performance Insights with the Inventory Intelligence Analytics Dashboard](#)

Explore stock status, compare inventory to orders at different locations, and track inventory levels and units sold—all with the Inventory Intelligence Analytics dashboard. Use stock level, product, and product grade filters to get a detailed analysis of your inventory.

[Review Product Behavior with the Product Intelligence Analytics Dashboard](#)

Get product stats on your total sales and orders in the Product Intelligence Analytics Dashboard. Dive into charts showcasing your top-selling items and categories. Get insights into your customers' product search habits, and explore which products are commonly purchased together.

[Understand Shopper Behavior with the Shopper Intelligence Analytics Dashboard](#)

Dive into the world of customer shopping behavior with engaging data visualizations in the Shopper Intelligence Analytics Dashboard. Discover who your active, at-risk, and churned customers are with easy-to-understand graphics. Gain valuable insights into your customer base by exploring important metrics like average customer lifetime value, average order value, and average purchase frequency.

[Bring Inventory Data into Data Cloud with the Omnichannel Inventory Connector](#)

Omnichannel Inventory tracks inventory availability across locations and selling channels, making stock management and customer order fulfillment a breeze. Use the Omnichannel Inventory Connector to ingest your inventory data into Data Cloud and unlock valuable inventory insights and predictions.

[Deliver a Personalized Customer Experience Using Data Cloud Segments](#)

Personalize your customers' shopping experience by combining the power of Data Cloud segments and Commerce buyer groups. Create shopper profiles using a wide range of customer data available in Data Cloud, and deliver personalized shopping experiences to your customers. When using data segment–based buyer groups, you can also show targeted content via Expression-Based Visibility and tailored promotions for buyer groups.

[Use AI to Offer Conversational Recommendations and Add Products to Cart](#)

Enhance your shopping experience with two new Shopper Copilot actions for B2C Einstein Bots. Use the provided template to create an Einstein bot and connect it to your store. You can also use the new Commerce Concierge bot blocks to add functionality.

Drive Business Insights and Grow Revenue with Data Cloud for Commerce

Data Cloud for Commerce uses the power of Data Cloud and CRM Analytics to provide a data-driven solution that offers important and actionable insights into your ecommerce business. The combination of customer data, key performance indicators (KPIs), and easy-to-understand data visualizations can help you improve store performance and the shopper experience.

Where: This change applies to Omnichannel Inventory, B2B Commerce, and D2C Commerce in Enterprise and Unlimited editions.

Who: To use the Intelligence Analytics dashboards, you need the Commerce Intelligence User permission set. To manage the Intelligence Analytics dashboards, you need the Commerce Intelligence Admin permission set.

How: To enable Data Cloud for Commerce, from Setup, in the Quick Find box, enter *Data Cloud for Commerce*, and then select **Data Cloud for Commerce**. Complete the required Data Cloud setup steps. Enable CRM Analytics, and turn on Data Cloud for Commerce. Assign the Commerce Intelligence permission sets to the users who you want to have access to Data Cloud for Commerce.

SEE ALSO:

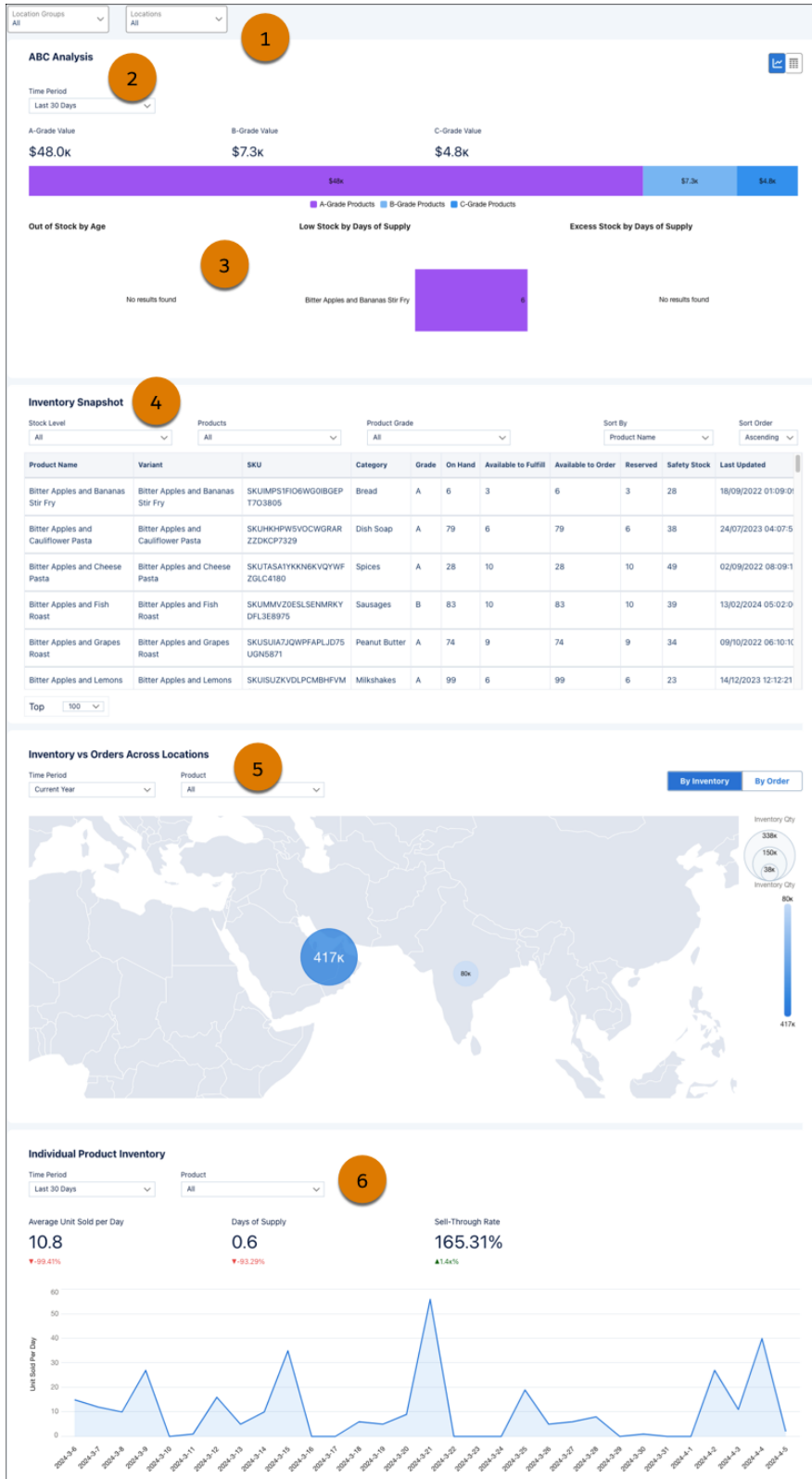
[Salesforce Help: Improve Store Performance with Commerce Intelligence \(can be outdated or unavailable during release preview\)](#)

Get Performance Insights with the Inventory Intelligence Analytics Dashboard

Explore stock status, compare inventory to orders at different locations, and track inventory levels and units sold—all with the Inventory Intelligence Analytics dashboard. Use stock level, product, and product grade filters to get a detailed analysis of your inventory.

Where: This change applies to Omnichannel Inventory, B2B Commerce, and D2C Commerce in Enterprise and Unlimited editions.

How: Use filters to select locations and time periods (1). See the value of inventory items based on their importance to the business (2), and review charts that show stock supply (3). Understand more about your current inventory snapshot with filters for stock level, product, and product grade (4). Review your inventory and order levels by location (5) and for individual products (6).



SEE ALSO:

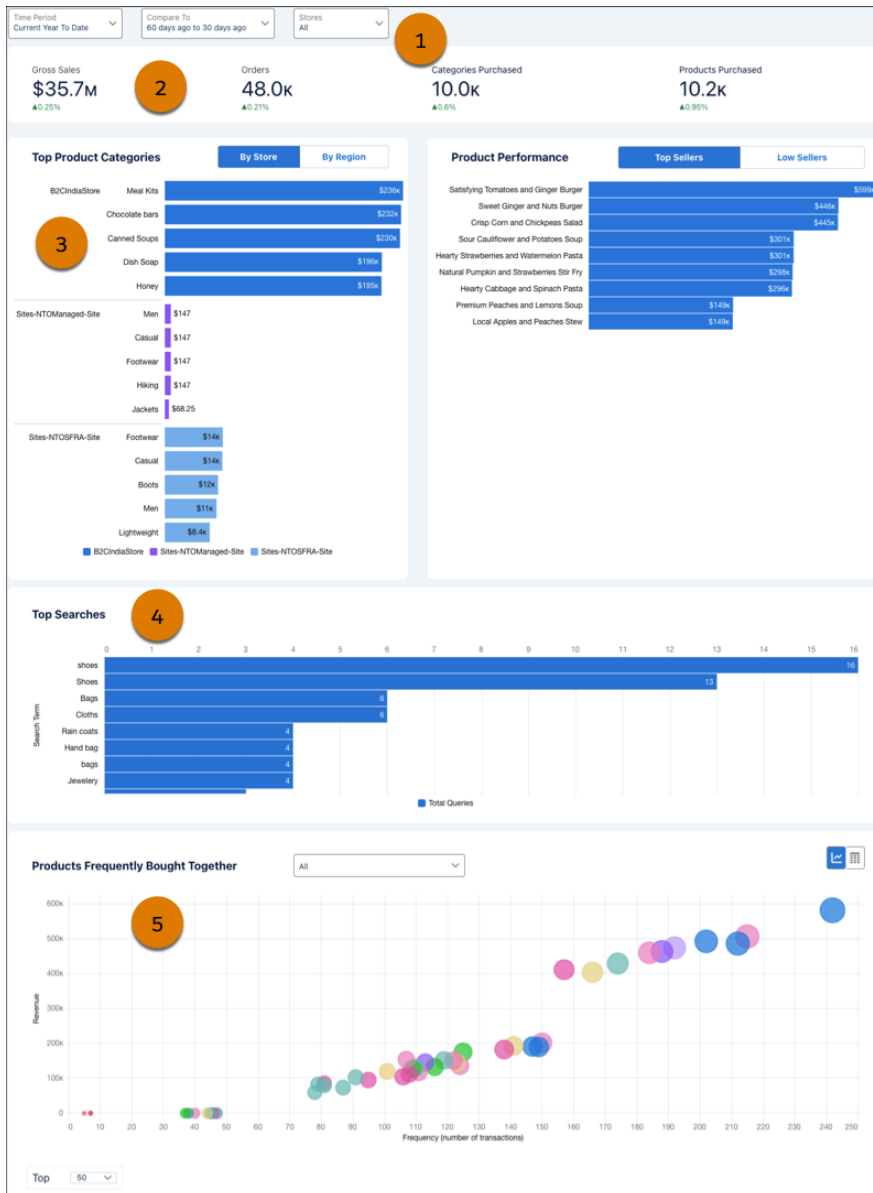
[Salesforce Help: Commerce Intelligence Analytics Dashboards \(can be outdated or unavailable during release preview\)](#)

Review Product Behavior with the Product Intelligence Analytics Dashboard

Get product stats on your total sales and orders in the Product Intelligence Analytics Dashboard. Dive into charts showcasing your top-selling items and categories. Get insights into your customers' product search habits, and explore which products are commonly purchased together.

Where: This change applies to B2B Commerce and D2C Commerce in Enterprise and Unlimited editions.

How: Use filters to select specific time periods and stores (1). See high-level statistics about your sales, orders, and purchased categories and products (2). Review charts that show your top-selling products and categories (3). Understand more about your customer's product search behavior (4), and review data about which products are frequently bought together (5).



SEE ALSO:

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

Understand Shopper Behavior with the Shopper Intelligence Analytics Dashboard

Dive into the world of customer shopping behavior with engaging data visualizations in the Shopper Intelligence Analytics Dashboard. Discover who your active, at-risk, and churned customers are with easy-to-understand graphics. Gain valuable insights into your customer base by exploring important metrics like average customer lifetime value, average order value, and average purchase frequency.

Where: This change applies to B2B Commerce and D2C Commerce in Enterprise and Unlimited editions.

How: Use filters to select specific time periods and stores (1). Review high-level statistics and charts about your customers (2) and customer lifetime value (3). Understand more about your customers' purchase behavior (4) and their location and recency, frequency, and monetary value (RFM) score (5).



SEE ALSO:

[Salesforce Help: Commerce Intelligence Analytics Dashboards](#) (can be outdated or unavailable during release preview)

Bring Inventory Data into Data Cloud with the Omnichannel Inventory Connector

Omnichannel Inventory tracks inventory availability across locations and selling channels, making stock management and customer order fulfillment a breeze. Use the Omnichannel Inventory Connector to ingest your inventory data into Data Cloud and unlock valuable inventory insights and predictions.

Where: This change applies to Data Cloud and Omnichannel Inventory in Developer, Enterprise, and Unlimited editions.

When: This feature is available starting in June 2024.

Who: To connect to Omnichannel Inventory, use the Data Cloud Admin or Commerce Intelligence Admin permission set.

How: From Data Cloud Setup, in the Quick Find box, enter *Omnichannel Inventory Connector*, and then select **Omnichannel Inventory Connector**.

SEE ALSO:

[Salesforce Help: Set Up an Omnichannel Inventory Connection \(can be outdated or unavailable during release preview\)](#)

Deliver a Personalized Customer Experience Using Data Cloud Segments

Personalize your customers' shopping experience by combining the power of Data Cloud segments and Commerce buyer groups. Create shopper profiles using a wide range of customer data available in Data Cloud, and deliver personalized shopping experiences to your customers. When using data segment–based buyer groups, you can also show targeted content via Expression-Based Visibility and tailored promotions for buyer groups.

Where: This change applies to B2B Commerce and D2C Commerce in Enterprise, Unlimited, and Developer editions.

How: To use Data Cloud segments, from Setup, in the Quick Find box, enter *Commerce Personalization*, and then select **Commerce Personalization with Data Cloud Segments**.

SEE ALSO:

[Salesforce Help: Create a Buyer Group Based on a Data Segment \(can be outdated or unavailable during release preview\)](#)

Use AI to Offer Conversational Recommendations and Add Products to Cart

Enhance your shopping experience with two new Shopper Copilot actions for B2C Einstein Bots. Use the provided template to create an Einstein bot and connect it to your store. You can also use the new Commerce Concierge bot blocks to add functionality.

Where: This change applies to Lightning Experience in Unlimited Edition 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, create a bot from the Commerce Concierge B2C template. To add blocks to a bot, from the Dialogs page of the Bot Builder, import a block into your bot.

SEE ALSO:

[Salesforce Help: Optimize Your Customers' Shopping Experience with the Commerce Concierge Bot \(can be outdated or unavailable during release preview\)](#)

Commerce Promotions

Rev up your promotions with templates that make it easy to create enticing deals for your customers. Offer shipping promotions to drive sales and encourage customers to complete their purchases. Enjoy the flexibility of updating an active promotion. Make your promotions stand out by displaying pricing on Product Card components with customizable text colors. Combine promotions for a total percentage discount to keep things tidy.

IN THIS SECTION:

[Create Promotions with Ease Using a Template](#)

Jump-start your promotions by using a predesigned template. Choose from examples that use products and categories from your store, which then populate your promotion details.

Entice Customers with Shipping Promotions

Offer shipping promotions in your store to compel customers to complete their purchase. You can select the adjustment type, percent, amount and currency. Shipping promotions are applied automatically in B2B and D2C Commerce stores and you can use manually applied shipping promotions during checkout in D2C Commerce stores.

Configure Promotion Segments with More Flexibility

When creating a store, you can now associate a promotion segment with either a store or a buyer group, but not both. Plus, you have the flexibility to update the Active, Commerce Promotion, and Automatic Promotion fields when the promotion is associated with a segment. If you have an existing Commerce store that has a buyer group and sales store segment, delete either the store or buyer group and then create the promotion.

Highlight Promotional Pricing in Your Store

Make your promotions pop. Your customers can now view promotional pricing on the Product Card component. Adjust the color of the text for some extra pizzazz. Decide when to combine all promotions into a total percentage to keep things tidy.

Create Promotions with Ease Using a Template

Jump-start your promotions by using a predesigned template. Choose from examples that use products and categories from your store, which then populate your promotion details.

Where: This change applies to B2B Commerce and D2C Commerce in Enterprise, Unlimited, and Developer editions.

How: In the Promotion workspace, click **Draft from Template**, and then select the store. Select a sample template that describes the promotion that you want to create. Review the details presented and then activate your promotion.

The screenshot shows the 'New Promotion' interface. On the left, there is a form titled 'Edit Your Promotion' with sections for 'Details', 'Display Options', and 'Discounts'. The 'Details' section includes fields for 'Store' (B2C Codecept), 'Audience' (All Customers), 'Name' (Buy \$100 of any products from Products, and get 10% off entire transaction), 'Active' (checked), and 'Description'. The 'Display Options' section includes 'Display Name' (10% Off Transaction) and 'Terms and Conditions'. The 'Discounts' section is currently empty. On the right, there is a panel titled 'Or Select a Template' with a blue header and an information icon. It contains instructions: 'Select a store, and we'll use that store's products and categories to generate templates.' Below this, there are two steps: 'Step 1: Select a Store' (B2C Codecept) and 'Step 2: Select a Template'. Three template options are listed, each with a plus sign to select it: 1. 'Buy 'Alpine Energy Drink Chai Post 0.5L PET - 6 pack'; Get 10% off 'Alpine Energy Post Eco Pod, Chai'. 2. 'Buy at least 3 of 'Alpine Energy Drink Chai Post 0.5L PET - 6 pack'; Get \$2 Fixed Amount of Unit Price Off 'Alpine Energy Post Eco Pod, Chai'. 3. 'Buy \$100 of any products from 'Products'; and get 10% off entire transaction.' A 'View More' link is at the bottom of the template list. At the bottom right of the interface are 'Cancel' and 'Save' buttons.

SEE ALSO:

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

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

Entice Customers with Shipping Promotions

Offer shipping promotions in your store to compel customers to complete their purchase. You can select the adjustment type, percent, amount and currency. Shipping promotions are applied automatically in B2B and D2C Commerce stores and you can use manually applied shipping promotions during checkout in D2C Commerce stores.

Where: This change applies to B2B Commerce and D2C Commerce in Enterprise, Unlimited, and Developer editions.

How: In your promotion, on the Discounts tab, select **New**. Select **Shipping** for the target type.

New Promotion Target

* = Required Information

Discount Details

* Promotion
Spring Sale

Promotion Tier
Search Promotion Tiers...

* Target Type
Shipping

Target
Category Search...

Target & Adjustment Types

Currency ISO Code
USD - U.S. Dollar

* Adjustment Type
Percentage Discount

Adjustment Percent
15.00%

Adjustment Amount

Quantity Limit

Cancel Save & New Save

SEE ALSO:

[Salesforce Help: Define Promotion Discounts \(can be outdated or unavailable during release preview\)](#)

Configure Promotion Segments with More Flexibility

When creating a store, you can now associate a promotion segment with either a store or a buyer group, but not both. Plus, you have the flexibility to update the Active, Commerce Promotion, and Automatic Promotion fields when the promotion is associated with a segment. If you have an existing Commerce store that has a buyer group and sales store segment, delete either the store or buyer group and then create the promotion.

Where: This change applies to B2B Commerce and D2C Commerce in Enterprise, Unlimited, and Developer editions.

SEE ALSO:

[Salesforce Help: Add a Promotion Segment \(can be outdated or unavailable during release preview\)](#)

Highlight Promotional Pricing in Your Store

Make your promotions pop. Your customers can now view promotional pricing on the Product Card component. Adjust the color of the text for some extra pizzazz. Decide when to combine all promotions into a total percentage to keep things tidy.

Where: This change applies to D2C Commerce in Enterprise, Unlimited, and Developer editions.

How: In Experience Builder, add a Product Card to a Search, Category, or Product page. Choose when to present a total promotion percentage, and select a promotion text color.



SEE ALSO:

[Salesforce Help: Customize Promotions in Experience Builder \(can be outdated or unavailable during release preview\)](#)

Commerce Components

Showcase your content on your Commerce LWR store with the Carousel component. Easily integrate links to popular social media platforms into your Commerce LWR store with the Social Links component. Enhance your customers' shopping experience with the upgraded Order History component, now featuring product images to help them track their purchases.

IN THIS SECTION:

[Blend Social Media into Your Commerce Store with the Social Links Component](#)

Integrate links to popular social media platforms in your Commerce LWR store with the Social Links component. The component recognizes and displays the logos of the prominent social media sites, making it easy to connect with your audience across various platforms. Customize the component's appearance to match your brand's style and preferences. Replace the default icons with your own images, choose between horizontal or vertical display styles, and fine-tune the alignment of the icons to achieve your desired look.

[Improve the Shopper Experience with Enhanced Components](#)

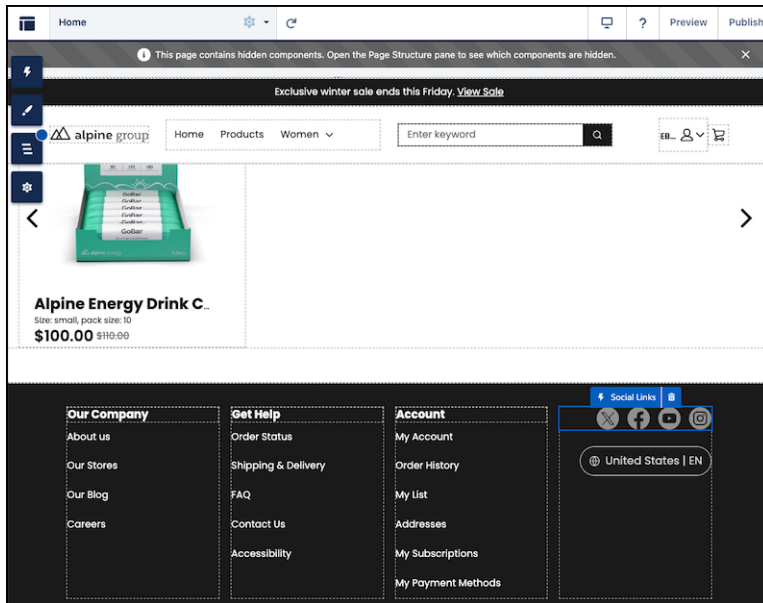
Help your customers track their purchases with an upgraded Order History component that now features product images. Customers can view their order history and filter results for a selected time frame. Add the No Results template to your Order History component to display a message on the search results page when a query yields no results. Check out the improved Profile navigation to offer your customers a more user-friendly experience.

Blend Social Media into Your Commerce Store with the Social Links Component

Integrate links to popular social media platforms in your Commerce LWR store with the Social Links component. The component recognizes and displays the logos of the prominent social media sites, making it easy to connect with your audience across various platforms. Customize the component's appearance to match your brand's style and preferences. Replace the default icons with your own images, choose between horizontal or vertical display styles, and fine-tune the alignment of the icons to achieve your desired look.

Where: This change applies to B2B Commerce and D2C Commerce in Enterprise, Unlimited, and Developer editions.

How: From Experience Builder, drag the Social Links component onto a page.



SEE ALSO:

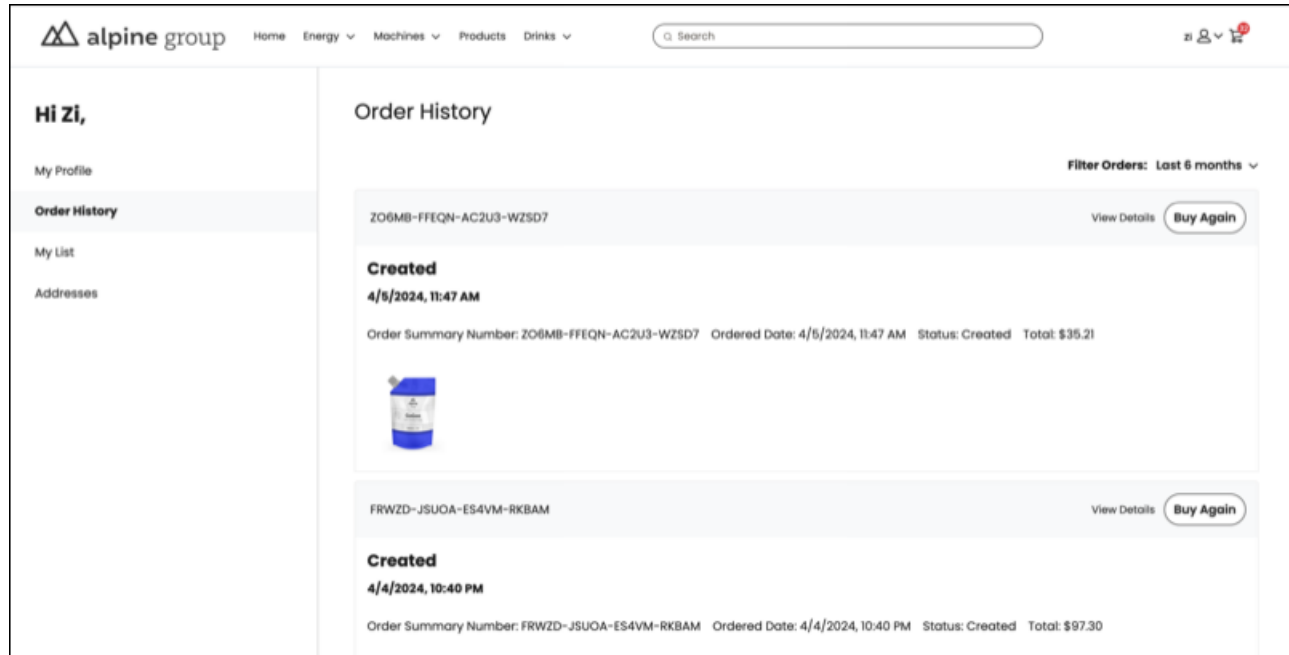
[Salesforce Help: LWR Store Components \(can be outdated or unavailable during release preview\)](#)

Improve the Shopper Experience with Enhanced Components

Help your customers track their purchases with an upgraded Order History component that now features product images. Customers can view their order history and filter results for a selected time frame. Add the No Results template to your Order History component to display a message on the search results page when a query yields no results. Check out the improved Profile navigation to offer your customers a more user-friendly experience.

Where: This change applies to D2C Commerce in Enterprise, Unlimited, and Developer editions.

How: In Experience Builder, go to the My Profile page and select the Navigation List Menu. Add or modify menu items to personalize your account navigation.



SEE ALSO:

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

Commerce Store Management

In the refreshed Commerce app, Goals and Recommendations has moved into the Insights and Actions workspace. Use the new History table to see details of a specific action and the output, such as a new promotion. The table shows only the actions that were taken for the selected goal. Get more ideas about how to improve your store's performance with more recommended actions.

IN THIS SECTION:

[Goals and Recommendations Is Now Part of the Insights and Actions Workspace](#)

In the refreshed Commerce app, Goals and Recommendations has moved into the Insights and Actions workspace.

[Enhance Store Performance with More Recommended Actions](#)

Get more ideas about how to improve your store's performance. Some of the new recommended actions include Configure Displayable Product Fields, Configure Search Settings, and Deploy Commerce Einstein. In the refreshed Commerce app, the top three recommended actions are featured on the store home page.

[View the History and Status of Accepted Actions](#)

In the Goals and Recommendations workspace, use the new History table to see details of a specific action and the output, such as a new promotion. The table shows only the actions that were taken for the selected goal.

[Use Visibility Rules to Manage What Buyers See](#)

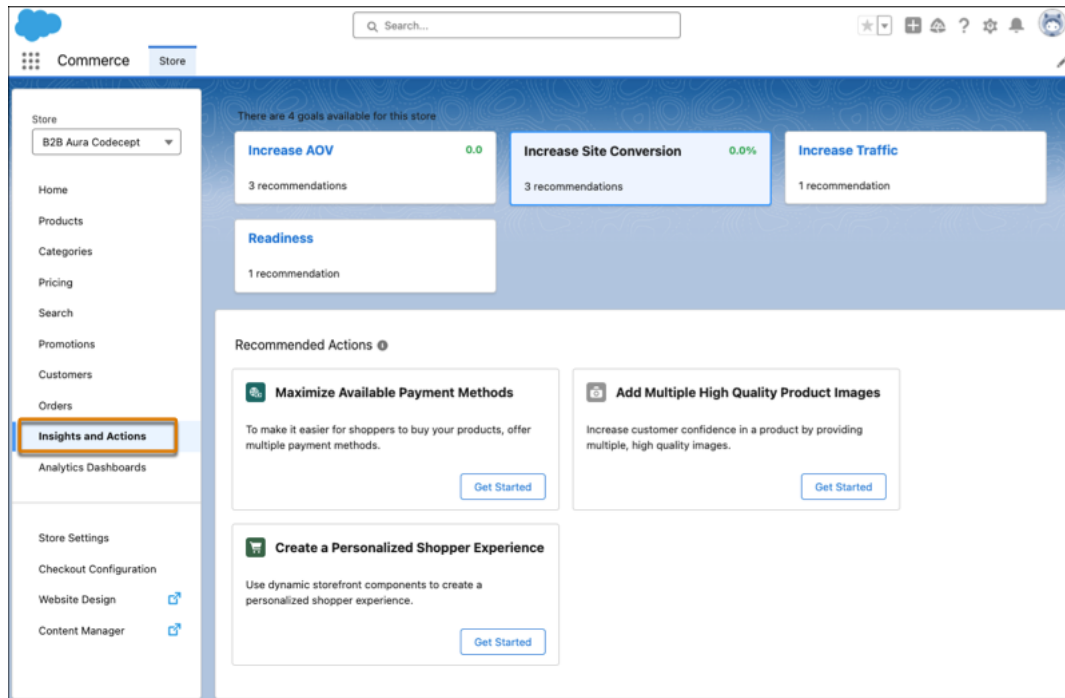
Customize the content that buyers see when switching accounts using expression-based visibility rules. Improve user experience and increase engagement by choosing which information is visible to different buyers.

Goals and Recommendations Is Now Part of the Insights and Actions Workspace

In the refreshed Commerce app, Goals and Recommendations has moved into the Insights and Actions workspace.

Where: This change applies to B2B Commerce and D2C Commerce in Enterprise, Unlimited, and Developer editions.

How: In the refreshed Commerce app, click **Insights and Actions**.



SEE ALSO:

[Salesforce Help: Goals and Recommendations \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Enable the Refreshed Commerce App \(can be outdated or unavailable during release preview\)](#)

Enhance Store Performance with More Recommended Actions

Get more ideas about how to improve your store's performance. Some of the new recommended actions include Configure Displayable Product Fields, Configure Search Settings, and Deploy Commerce Einstein. In the refreshed Commerce app, the top three recommended actions are featured on the store home page.

Where: This change applies to B2B Commerce and D2C Commerce in Enterprise, Unlimited, and Developer editions.

SEE ALSO:

[Salesforce Help: Goals and Recommendations \(can be outdated or unavailable during release preview\)](#)

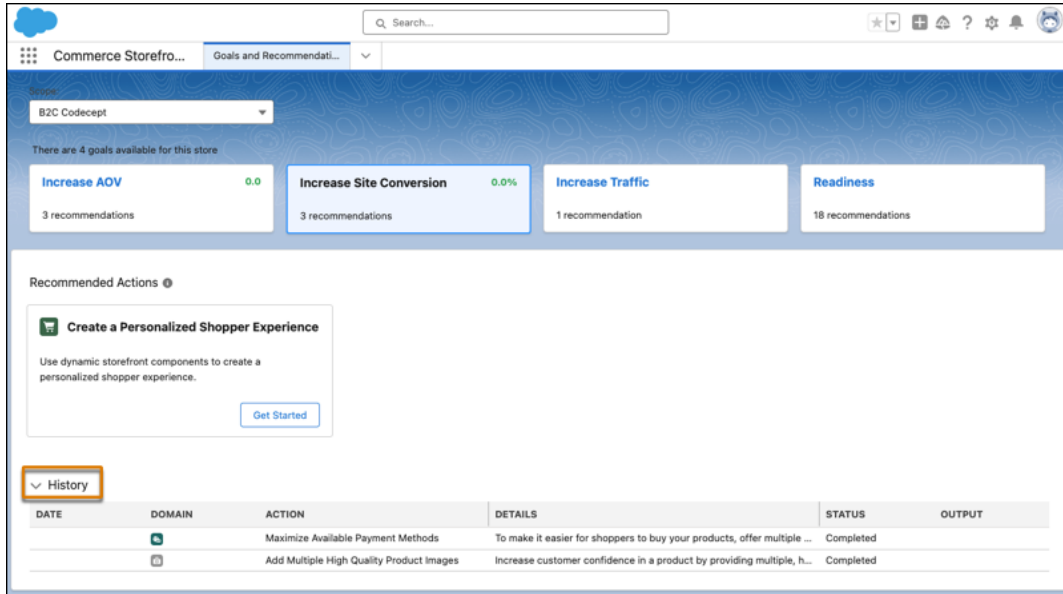
[Salesforce Help: Enable the Refreshed Commerce App \(can be outdated or unavailable during release preview\)](#)

View the History and Status of Accepted Actions

In the Goals and Recommendations workspace, use the new History table to see details of a specific action and the output, such as a new promotion. The table shows only the actions that were taken for the selected goal.

Where: This change applies to B2B Commerce and D2C Commerce in Enterprise, Unlimited, and Developer editions.

How: In the Goals and Recommendations workspace, select a goal. To see the actions that were taken for that goal, view the History table.



SEE ALSO:

[Salesforce Help: Goals and Recommendations \(can be outdated or unavailable during release preview\)](#)

Use Visibility Rules to Manage What Buyers See

Customize the content that buyers see when switching accounts using expression-based visibility rules. Improve user experience and increase engagement by choosing which information is visible to different buyers.

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

How: In Experience Builder, select the component that you want to customize, and add the visibility rule to the component.

SEE ALSO:

[Salesforce Help: Allow Buyers Access to External Accounts for B2B Stores \(can be outdated or unavailable during release preview\)](#)

Commerce Dashboards

Gain valuable insights into the health and performance of your store's payment transactions with the Commerce Payments Dashboard. Take advantage of the Promotions Dashboard to view coupon offerings and discount campaigns to create data-driven strategies to optimize and enhance customer acquisition, engagement, and retention. Monitor your store's financial health with the Commerce Finance Dashboard, which provides a comprehensive view of your sales, taxes, and shipping charges.

IN THIS SECTION:[Analyze Payment Performance with the Commerce Payments Dashboard](#)

Get insights into the health and performance of your store's payment transactions. The Commerce Payments Dashboard offers a comprehensive view of your online payments. You can analyze this information and make data-driven decisions to streamline your transaction processes.

[Measure the Effectiveness of Your Promotions with the Commerce Promotions Dashboard](#)

Get a comprehensive analysis of your promotions, coupon offerings, and discount campaigns. Use the information to create data-driven strategies and optimize your promotions, ultimately improving customer acquisition, engagement, and retention.

[Track Your Store's Financial Health with the Commerce Finance Dashboard](#)

Get a comprehensive view of your store's financial health with the Commerce Finance Dashboard. Monitor your sales, taxes, and shipping charges within a selected date range all in a single dashboard.

[Get Order Summary Entity Data in the Business Overview Dashboard](#)

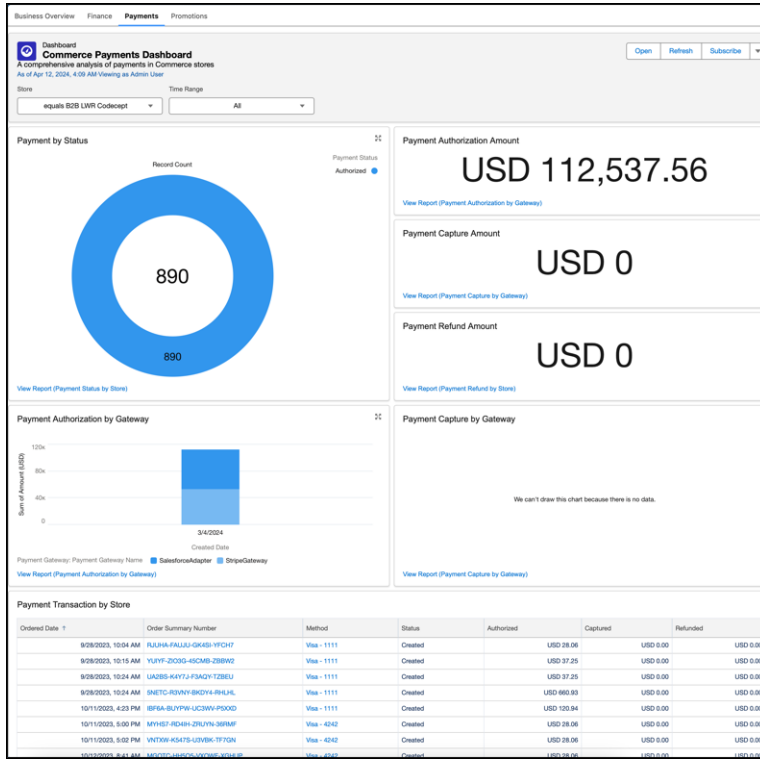
The Business Overview Dashboard now displays reports using data from the Order Summary entity, resulting in a more streamlined view of your key business metrics. To use the Order Summary entity data, reinstall the Business Overview Dashboard using Commerce Setup Assistant. If your current dashboard has customizations that you want to maintain, clone it before installing the new dashboard.

Analyze Payment Performance with the Commerce Payments Dashboard

Get insights into the health and performance of your store's payment transactions. The Commerce Payments Dashboard offers a comprehensive view of your online payments. You can analyze this information and make data-driven decisions to streamline your transaction processes.

Where: This change applies to B2B Commerce and D2C Commerce in Enterprise, Unlimited, and Developer editions.

How: Install the Commerce Payments Dashboard using the Commerce Setup Assistant.



SEE ALSO:

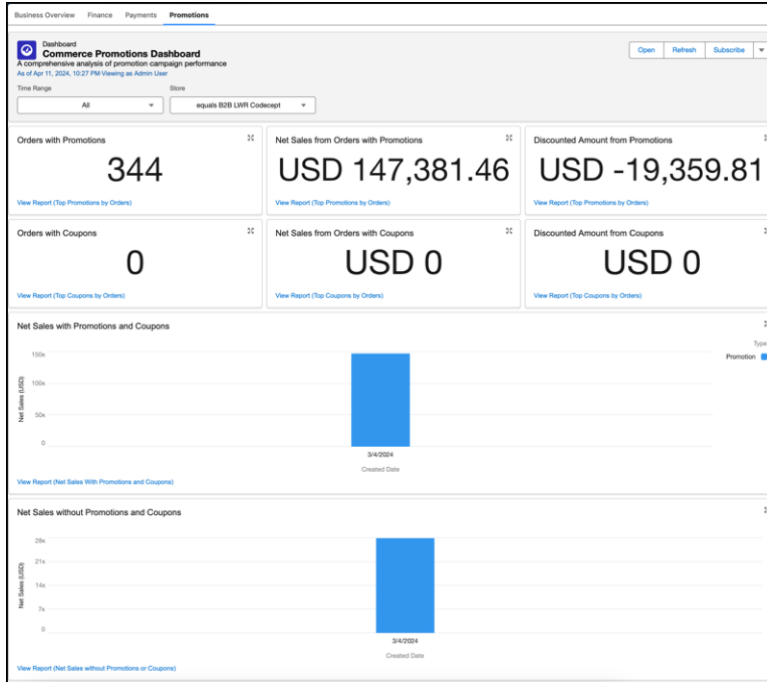
[Salesforce Help: Prepare Your Org for Commerce \(can be outdated or unavailable during release preview\)](#)

Measure the Effectiveness of Your Promotions with the Commerce Promotions Dashboard

Get a comprehensive analysis of your promotions, coupon offerings, and discount campaigns. Use the information to create data-driven strategies and optimize your promotions, ultimately improving customer acquisition, engagement, and retention.

Where: This change applies to B2B Commerce and D2C Commerce in Enterprise, Unlimited, and Developer editions.

How: Install the Commerce Payments Dashboard using the Commerce Setup Assistant.



SEE ALSO:

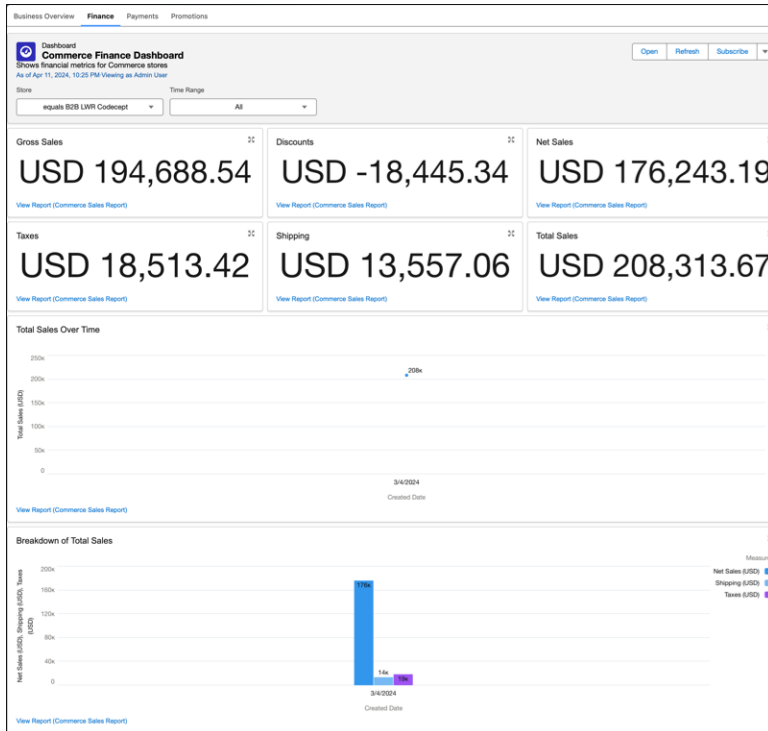
[Salesforce Help: Prepare Your Org for Commerce \(can be outdated or unavailable during release preview\)](#)

Track Your Store's Financial Health with the Commerce Finance Dashboard

Get a comprehensive view of your store's financial health with the Commerce Finance Dashboard. Monitor your sales, taxes, and shipping charges within a selected date range all in a single dashboard.

Where: This change applies to B2B Commerce and D2C Commerce in Enterprise, Unlimited, and Developer editions.

How: Install the Commerce Payments Dashboard using the Commerce Setup Assistant.



SEE ALSO:

[Salesforce Help: Prepare Your Org for Commerce \(can be outdated or unavailable during release preview\)](#)

Get Order Summary Entity Data in the Business Overview Dashboard

The Business Overview Dashboard now displays reports using data from the Order Summary entity, resulting in a more streamlined view of your key business metrics. To use the Order Summary entity data, reinstall the Business Overview Dashboard using Commerce Setup Assistant. If your current dashboard has customizations that you want to maintain, clone it before installing the new dashboard.

Where: This change applies to B2B and D2C Commerce in Enterprise, Unlimited, and Developer editions.

SEE ALSO:

[Salesforce Help: Prepare Your Org for Commerce \(can be outdated or unavailable during release preview\)](#)

Additional Commerce Features

Calculate, collect, and report tax on global payments automatically with the Salesforce Tax Solution. Add a product to up to five categories in your store and preview the results without leaving the add product page. Personalize your customers' shopping experience by combining Data Cloud segments and Commerce buyer groups. Create shopper profiles using a wide range of customer data available in Data Cloud.

IN THIS SECTION:

[Automate Tax Processes with the New Salesforce Tax Solution for Managed Checkout \(Generally Available\)](#)

Your merchants can now calculate, collect, and report tax on global payments automatically using the new Salesforce Tax Solution for Managed checkout. You can stop maintaining static tax rate tables because the new tax solution manages US sales tax calculations. For non-US stores, the earlier version of Salesforce Tax Solution, now called Manual Salesforce Tax Solution, is still available with custom checkout to help you maintain your static tax rate tables.

[Preview Added Products in Your Store Before Activating](#)

Assign a product to as many as five categories in your store and preview the results without leaving the add product page. The new product's details are saved to your store's default buyer group, entitlement policy, CMS workspace, price book, strikethrough price book, and catalog. Previously, you added this information manually.

[Salesforce Tax Solution Is Renamed Manual Salesforce Tax Solution](#)

With the introduction of the new tax solution that automatically calculates tax, we renamed the existing Salesforce Tax Solution to Manual Salesforce Tax Solution. The new automatic tax solution is now named Salesforce Tax Solution. Based on how you want to set up your taxes, you can choose either solution. Salesforce Tax Solution is available only with Managed Checkout. Manual Salesforce Tax Solution is available only with custom checkout.

[Use a Single Custom Domain for Multiple Commerce Sites](#)

You can now have multiple Commerce and non-Commerce sites that use different URLs on a custom domain on the Salesforce CDN. Previously, each Commerce LWR site required a dedicated custom domain.

[Customize Your Salesforce Content Delivery Network \(CDN\) Settings for Commerce LWR Stores](#)

We recommend using the customizable Salesforce CDN for Commerce B2B and D2C LWR stores, so you can fine-tune the CDN default settings to address the unique needs of your storefront domain. Apply image optimization and the web application firewall (WAF) as needed, and protect your domain from malicious activity with up to 10 custom WAF rules. You can use an autonomous system number (ASN), IP address, and country to define the custom WAF rules. You can update the default settings of domains that are already provisioned.

[Product and Category Record Pages Have a New Layout](#)

Easily review essential product and category information and navigate through related details with the new, intuitive layout. All customers automatically receive the refreshed default layouts. You can also customize the product and category layouts in the Lightning App Builder.

Automate Tax Processes with the New Salesforce Tax Solution for Managed Checkout (Generally Available)

Your merchants can now calculate, collect, and report tax on global payments automatically using the new Salesforce Tax Solution for Managed checkout. You can stop maintaining static tax rate tables because the new tax solution manages US sales tax calculations. For non-US stores, the earlier version of Salesforce Tax Solution, now called Manual Salesforce Tax Solution, is still available with custom checkout to help you maintain your static tax rate tables.

Where: This change applies to B2B Commerce and D2C Commerce in Enterprise, Unlimited, and Developer editions.

How: After you set up payments, select the default tax category and complete the tax registration.

SEE ALSO:

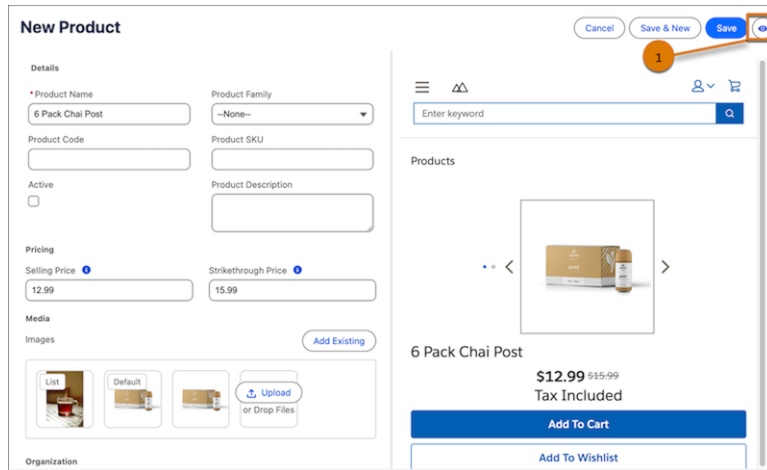
[Salesforce Help: Configure the Salesforce Tax Solution \(can be outdated or unavailable during release preview\)](#)

Preview Added Products in Your Store Before Activating

Assign a product to as many as five categories in your store and preview the results without leaving the add product page. The new product's details are saved to your store's default buyer group, entitlement policy, CMS workspace, price book, strikethrough price book, and catalog. Previously, you added this information manually.

Where: This change applies to B2B and D2C Commerce in Enterprise, Unlimited, and Developer editions.

How: To turn live preview on or off, click the preview icon (1).



SEE ALSO:

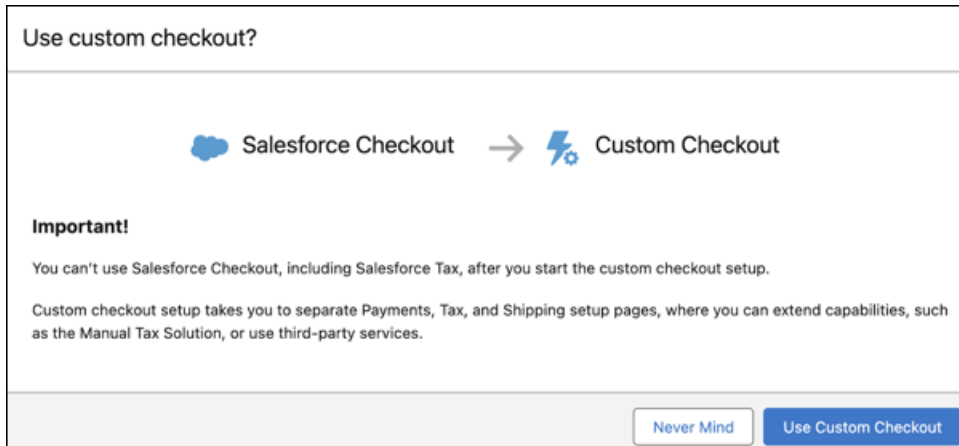
[Salesforce Help: Add a Product to a Commerce Store \(can be outdated or unavailable during release preview\)](#)

Salesforce Tax Solution Is Renamed Manual Salesforce Tax Solution

With the introduction of the new tax solution that automatically calculates tax, we renamed the existing Salesforce Tax Solution to Manual Salesforce Tax Solution. The new automatic tax solution is now named Salesforce Tax Solution. Based on how you want to set up your taxes, you can choose either solution. Salesforce Tax Solution is available only with Managed Checkout. Manual Salesforce Tax Solution is available only with custom checkout.

Where: This change applies to B2B Commerce and D2C Commerce in Enterprise, Unlimited, and Developer editions.

How: To switch to Manual Salesforce Tax Solution, on the Checkout Configuration page, click **Use Custom Checkout**. You can't use the new Salesforce Tax solution after you switch to Manual Salesforce Tax Solution.



SEE ALSO:

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

Use a Single Custom Domain for Multiple Commerce Sites

You can now have multiple Commerce and non-Commerce sites that use different URLs on a custom domain on the Salesforce CDN. Previously, each Commerce LWR site required a dedicated custom domain.

Where: This change applies to B2B Commerce and D2C Commerce sites in Enterprise, Performance, and Unlimited editions.

Customize Your Salesforce Content Delivery Network (CDN) Settings for Commerce LWR Stores

We recommend using the customizable Salesforce CDN for Commerce B2B and D2C LWR stores, so you can fine-tune the CDN default settings to address the unique needs of your storefront domain. Apply image optimization and the web application firewall (WAF) as needed, and protect your domain from malicious activity with up to 10 custom WAF rules. You can use an autonomous system number (ASN), IP address, and country to define the custom WAF rules. You can update the default settings of domains that are already provisioned.

Where: This change applies to B2B Commerce and D2C Commerce sites in Enterprise, Performance, and Unlimited editions.

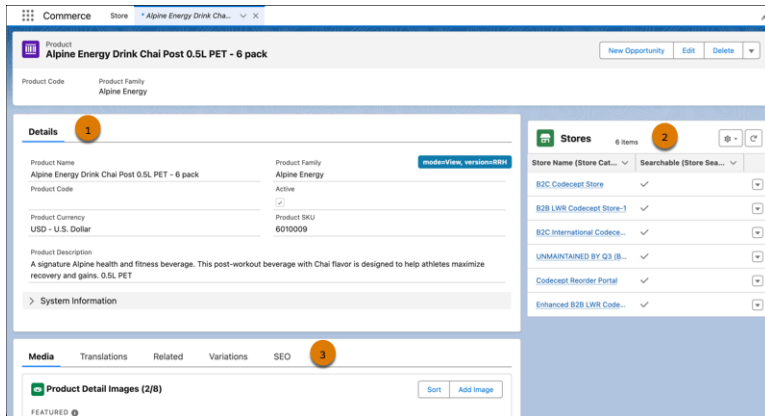
How: When creating a custom domain, select **Serve the domain with the Salesforce Content Delivery Network (CDN)** and select **Use the Salesforce CDN for Commerce LWR sites or sites hosted on Experience Delivery**. Then associate the domain with a Commerce LWR store. To customize the Salesforce CDN settings, go to the Domains page and click **Edit CDN Settings** next to the domain. You can enable the **Use the Salesforce CDN for Commerce LWR sites or sites hosted on Experience Delivery** option for existing custom domains, as well, with no downtime.

Product and Category Record Pages Have a New Layout

Easily review essential product and category information and navigate through related details with the new, intuitive layout. All customers automatically receive the refreshed default layouts. You can also customize the product and category layouts in the Lightning App Builder.

Where: This change applies to B2B and D2C Commerce in Enterprise, Unlimited, and Developer editions.

How: View record information in the main region of the page (1). Expanded cards for related quick links (2) are pinned on the right side. Use the tabs to access more features (3).



SEE ALSO:

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

[Salesforce Help: Assign Page Layouts to Profiles or Record Types](#) (can be outdated or unavailable during release preview)

Salesforce Order Management

Easily replace shopper and buyer items using enhanced exchanges, now accessible in the UI via flows. Manage orders in bulk with large order support for cancellations, returns, and more.

IN THIS SECTION:

[Exchange Fulfilled Items Using UI Flows](#)

Enhance your exchanges with post-fulfillment and uneven exchanges—no need to create your own flow using APIs. Increase your post-order services and provide a more flexible order management experience. To use the exchanges flow in the UI, clone the flow and then add it to your Actions and Recommendations section.

[Bulk-Edit Items on Cancel, Discount, Return, and Return RMA Flows](#)

Quickly edit quantity, reason, and shipping information for the items that you want to cancel, discount, and return in bulk. Improve item findability using the new page navigation and search components for order summary records with more than 25 lines.

Exchange Fulfilled Items Using UI Flows

Enhance your exchanges with post-fulfillment and uneven exchanges—no need to create your own flow using APIs. Increase your post-order services and provide a more flexible order management experience. To use the exchanges flow in the UI, clone the flow and then add it to your Actions and Recommendations section.

Where: This change applies to Order Management in Unlimited, Developer, and Enterprise editions with the Order Management Growth license.

SEE ALSO:

[Salesforce Help: Process an Exchange with an RMA Return](#) (can be outdated or unavailable during release preview)

Bulk-Edit Items on Cancel, Discount, Return, and Return RMA Flows

Quickly edit quantity, reason, and shipping information for the items that you want to cancel, discount, and return in bulk. Improve item findability using the new page navigation and search components for order summary records with more than 25 lines.

Where: This change applies to Order Management in Unlimited, Developer, and Enterprise editions.

How: From the Actions & Recommendations list on an order summary record, select the flow and use the new page navigation, search, and bulk-edit capabilities.

The screenshot displays a bulk-edit interface titled "Select the quantity to cancel and the cancellation reason." It features a table with the following columns: Name, Quantity To Cancel, Reason, and Shipping. Two items are listed: "MICA FL 1" and "WOMEN'S TORPEDO JACKET". Each item has a quantity of 1 out of 6, a reason of "Unknown", and a checkbox for "Remove shipping amount". The interface includes a search bar, page navigation (Page 1 of 1), and a "Next" button.

SEE ALSO:

[Salesforce Help: Cancel an Order Item \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Discount an Order Item \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Create a Simple Return with a Refund \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Create a Managed RMA Return Order \(can be outdated or unavailable during release preview\)](#)

Salesforce Payments

Let the Commerce Setup Assistant configure Salesforce Payments, and add a Payments merchant account to your D2C store using Managed Checkout. Streamline how registered customers make purchases with one-click checkout. Get Pay Now with a new Salesforce Payments license that's independent of a Commerce license.

IN THIS SECTION:

[Simplify Payments Setup Using the Commerce Setup Assistant](#)

Sit back and let the Commerce Setup Assistant enable and configure Salesforce Payments for your D2C store, including remote payment gateways and Payments administrator profiles and permissions. The Commerce Setup Assistant also creates a Digital Experience site to serve as a data channel.

[Save Time Setting Up a Merchant Account Using Managed Checkout](#)

Managed Checkout is the fastest way to configure Salesforce Payments as your D2C store's payment service. It guides you through merchant account setup and assigns credit cards as the default payment method. If needed, you can add more payment methods. After you set up Payments, the configuration of the tax and shipping is also simplified so that you can get selling with minimal effort.

[Get Pay Now with a Payments License Purchased from Your Account](#)

Salesforce Pay Now lets you extend payments across any Salesforce app. Send a payment link to your customers and get paid. You can add Pay Now right from your org using the self-service Your Account app. Simply purchase a standalone Salesforce Payments license, and get key payments features at blended-rate pricing. If you want enterprise commerce features and negotiated pricing, Salesforce Payments is available with a B2B Commerce, D2C Commerce, Connected Commerce, or Order Management licenses, and offers Interchange-plus pricing.

[Offer Shoppers One-Click Checkout with Passwordless Login](#)

Simplify the checkout process and reduce cart abandonment with one-click checkout. When a first-time shopper checks out, they have the option of saving their payment and shipping information for future use. By opting in, the shopper creates an account with your store. When a registered shopper returns to make another purchase, they enter only their email address and a verification code. Their shipping and payment information is automatically filled in. Customers always have the option to check out as a guest.

Simplify Payments Setup Using the Commerce Setup Assistant

Sit back and let the Commerce Setup Assistant enable and configure Salesforce Payments for your D2C store, including remote payment gateways and Payments administrator profiles and permissions. The Commerce Setup Assistant also creates a Digital Experience site to serve as a data channel.

Where: This change applies to Payments and D2C Commerce in Enterprise and Unlimited editions.

How: From the Commerce Setup Assistant, run the Salesforce Commerce Basic Setup.

The screenshot displays the 'Commerce Setup Assistant' interface. At the top, there is a 'SETUP' header with a gear icon and the title 'Commerce Setup Assistant'. Below this is a navigation bar with a 'Home' link. The main content area is divided into two tabs: 'Basic Setup' (active) and 'Additional Setup' (disabled, indicated by a red circle with a slash). The 'Basic Setup' section features a heading 'Salesforce Commerce Basic Setup' with a green badge indicating '6 of 6 steps completed'. Below the heading, a paragraph explains that the assistant will look at Commerce licenses and set up the org automatically, overwriting any existing settings with optimized values. Three completed steps are listed: 'Features' (installing and enabling features), 'Sharing Settings' (optimizing data and records access), and 'Profiles and Permission Sets' (creating or optimizing profiles and permission sets). Each step is marked with a green checkmark and a right-pointing chevron.

SEE ALSO:

[Get Set Up Quicker with the Updated Commerce Assistant](#)

[Salesforce Help: Prepare Your Org for Commerce \(can be outdated or unavailable during release preview\)](#)

Save Time Setting Up a Merchant Account Using Managed Checkout

Managed Checkout is the fastest way to configure Salesforce Payments as your D2C store's payment service. It guides you through merchant account setup and assigns credit cards as the default payment method. If needed, you can add more payment methods. After you set up Payments, the configuration of the tax and shipping is also simplified so that you can get selling with minimal effort.

Where: This change applies to Payments and D2C Commerce in Enterprise and Unlimited editions.

How: From your store's home page, select **Checkout Configuration**.

The screenshot displays the 'Checkout Configuration' interface for a Salesforce Commerce store. The left sidebar contains navigation options: Store (Store Sample), Home, Products, Categories, Pricing, Search, Promotions, Customers, Orders, Insights and Actions, Analytics Dashboards, Store Settings, Checkout Configuration (highlighted), Website Design, and Content Manager. The main content area is divided into four sections:

- Payments:** A message states 'Salesforce Checkout is the fastest way to set up native services for your store. First, set up Payments and Tax. Shipping is preconfigured so you can modify these settings any time.' Below this, it says 'Salesforce Payments is the easy and secure way to receive payments from your customers.' and lists two steps: 'Add a merchant account powered by Stripe' and 'Specify the payment methods you'll accept at your store'. A button labeled 'Add a Merchant Account' is present.
- Tax:** A message says 'Set up your store's tax service.' and lists two steps: 'Select the store's default tax category' and 'Complete tax registration with Stripe to collect tax.' A button labeled 'Select Default Tax Category' is shown with a note: 'You haven't set up Payments yet!'.
- Shipping:** A message says 'To help you manage shipping, we've created a general shipping profile. Set up shipping zones based on where you're shipping to and what rates you're offering shoppers.' Below this, it says 'General Shipping Profile' and shows a table with columns 'Shipping Zones' and 'Shipping To'. The table contains one row: 'Shipping Zone (1 Rate)' and 'United States'. Below the table, it says 'Processing Time' and '1 Day(s)'. A button labeled 'Manage Shipping' is present.
- Custom Checkout:** A message says 'Custom checkout is an alternative checkout solution that lets you use third-party services, style your own checkout page, and create checkout components.' A button labeled 'Use Custom Checkout' is present.

SEE ALSO:

[Set Up Checkout Details Quickly with Managed Checkout for D2C Stores](#)

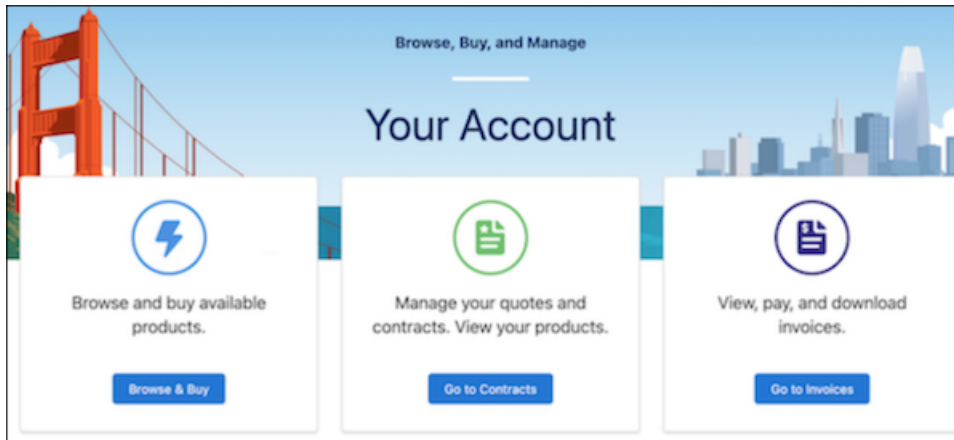
[Salesforce Help: Configure Checkout for a Commerce Store \(can be outdated or unavailable during release preview\)](#)

Get Pay Now with a Payments License Purchased from Your Account

Salesforce Pay Now lets you extend payments across any Salesforce app. Send a payment link to your customers and get paid. You can add Pay Now right from your org using the self-service Your Account app. Simply purchase a standalone Salesforce Payments license, and get key payments features at blended-rate pricing. If you want enterprise commerce features and negotiated pricing, Salesforce Payments is available with a B2B Commerce, D2C Commerce, Connected Commerce, or Order Management licenses, and offers Interchange-plus pricing.

Where: This change applies to Salesforce Payments in Enterprise and Unlimited editions.

How: Purchase a standalone Salesforce Payments license right from the self-service Your Account app.



SEE ALSO:

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

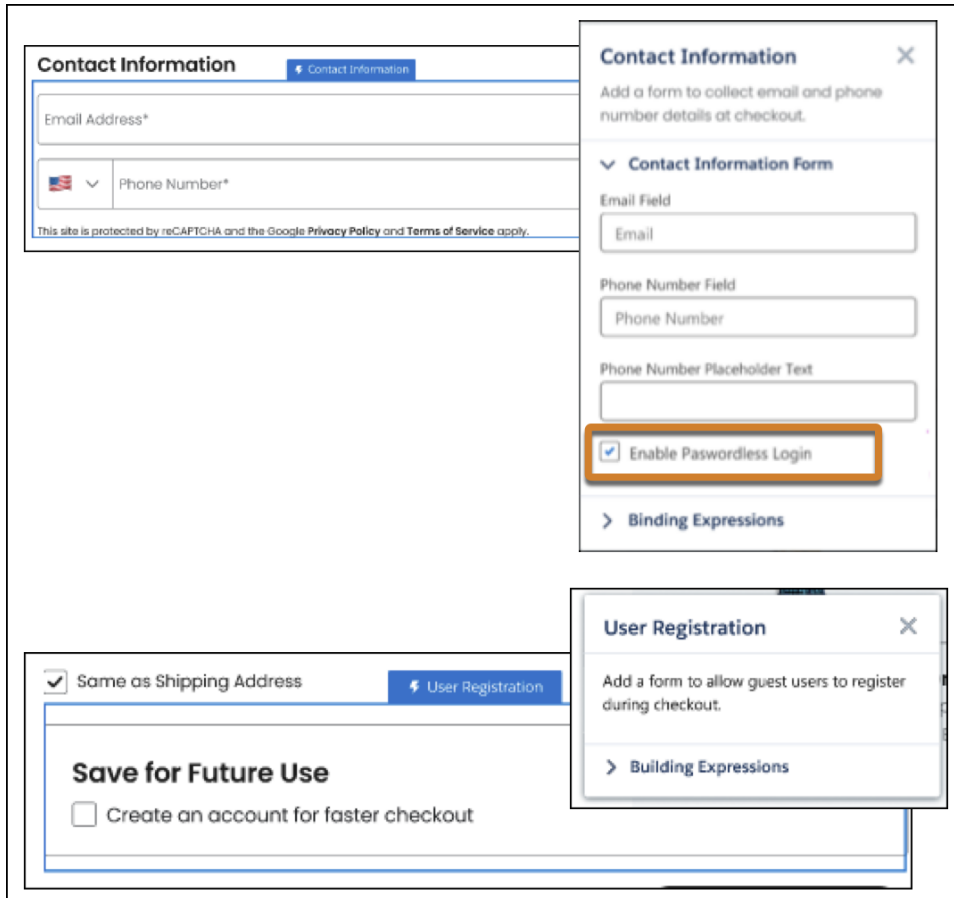
[Salesforce Help: Add Products and Licenses with the Your Account App \(can be outdated or unavailable during release preview\)](#)

Offer Shoppers One-Click Checkout with Passwordless Login

Simplify the checkout process and reduce cart abandonment with one-click checkout. When a first-time shopper checks out, they have the option of saving their payment and shipping information for future use. By opting in, the shopper creates an account with your store. When a registered shopper returns to make another purchase, they enter only their email address and a verification code. Their shipping and payment information is automatically filled in. Customers always have the option to check out as a guest.

Where: This change applies to Payments and Commerce in Enterprise and Unlimited editions.

How: For new D2C stores, one-click checkout is on by default. For existing D2C stores, go to Experience Builder and from the Checkout page, enable passwordless login in the Contact Information component. Next, drag the User Registration component onto the page.



SEE ALSO:

[Salesforce Help: Reduce Checkout Time with One-Click Checkout \(can be outdated or unavailable during release preview\)](#)

Customization

Manage users more easily with the user access, public group, permission set, and permission set group summaries. Give record page users more of what they need where and when they need it with Lightning record page enhancements such as blank space support and visibility rules on individual tabs.

IN THIS SECTION:

[Permissions and Sharing](#)

Understand access in under five clicks with new summary pages for user access, public groups, permission sets, and permission set groups. User access policies are generally available.

[Lightning App Builder](#)

Use the new Blank Space component to customize field alignment on Dynamic Forms-enabled record pages. Show or hide individual tabs inside a Tabs component with visibility rules.

[Globalization](#)

Enforcement of ICU Locale formats continues on a rolling basis. The Zimbabwe Gold (ZiG) currency is available in Salesforce. Stay up to date with ICU and JDK locale formats.

General Setup

Get explanations for formulas and fix syntax errors with Einstein for Formulas. Use a new step in the custom field creation wizard to automatically add new custom fields to your Dynamic Forms-enabled record pages. Block users with only the Manage Public List Views permission from seeing roles and role hierarchies when they edit public list views.

Permissions and Sharing

Understand access in under five clicks with new summary pages for user access, public groups, permission sets, and permission set groups. User access policies are generally available.

IN THIS SECTION:

[IdeaExchange Delivered: Get a Summary of a User's Permissions and Access](#)

If you've wondered what permissions, public groups, or queues a user is assigned, you're in luck. With the User Access Summary you can see this information directly from the user's detail page, saving you time, clicks, and effort. There's no need to run queries or look through each profile, permission set, public group, or queue when troubleshooting or managing access. We delivered this feature thanks to your ideas on IdeaExchange.

[IdeaExchange Delivered: See Where a Public Group Is Used](#)

Quickly find where a public group is used and the level of access its users get without running queries or clicking multiple features. For a specific public group, you can view the sharing rules an object is referenced in and the list views it's shared with in the new Public Group Access Summary. You can also see the report and dashboard folders that the public group can access and the other public groups it's included in. We delivered this feature thanks to your ideas on IdeaExchange.

[IdeaExchange Delivered: See What's Enabled in Permission Sets and Permission Set Groups \(Generally Available\)](#)

It can be tricky to track all the permissions included in your permission sets and permission set groups. To make managing your users' access easier, you can now see all enabled object, user, field, and custom permissions on one page. You can also see which permission set groups include the permission set and vice versa. This feature, now generally available, includes some changes since the beta release. The summary page has an improved interface, and we added the ability to see included custom permissions and permission sets in permission set groups. We delivered this feature thanks to your ideas on IdeaExchange.

[IdeaExchange Delivered: Automate and Migrate User Access with User Access Policies \(Generally Available\)](#)

Automate your users' assignments to permission sets, package licenses, public groups, and other access features based on criteria that you set. Create policies that automatically grant or remove access whenever users are created or updated. Or, easily migrate large sets of users to a new access setup in a single operation. User access policies, now generally available, include some enhancements since the Spring '24 release. You can now create 200 active policies, up from 20, and set the order in which active policies are run. We delivered this feature thanks to your ideas on IdeaExchange.

[Update the Order Field for Existing User Access Policies](#)

You can now specify which active user access policy is applied when a user meets the criteria for multiple policies by using the new Order field. Active user access policies created before Summer '24 were given order values based on their last-update date, but editing the order values to fit your requirements is recommended. Manual policies that aren't automated weren't given order values.

[IdeaExchange Delivered: Allow Users to Freeze Users and Monitor Login History Without the Manage Users Permission](#)

You can now grant the ability to freeze and unfreeze users by using the Freeze Users permission. You can also allow users to view and download login history with the Monitor Login History permission. With this permission, a user can access the login history related list on user records and view data in Login History reports with relevant report permissions. Previously, you assigned the Manage Users permission to enable these features for users, but it includes additional capabilities. For users currently assigned the Manage Users permission, the Freeze Users and Monitor Login History permissions are enabled automatically. We delivered this feature thanks to your ideas on IdeaExchange.

[Find Content on Managing Users and Data Access in One Place](#)

To make it easier to manage users and data access, we moved all related content to a single location in Salesforce Help. There you can find all Help content related to users, licenses, permissions, sharing, and more. We included content about managing external users and their access in Experience Cloud sites. We also expanded our guidance on troubleshooting access issues.



Get a Summary of a User's Permissions and Access

If you've wondered what permissions, public groups, or queues a user is assigned, you're in luck. With the User Access Summary you can see this information directly from the user's detail page, saving you time, clicks, and effort. There's no need to run queries or look through each profile, permission set, public group, or queue when troubleshooting or managing access. We delivered this feature thanks to your ideas on IdeaExchange.

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 `users`, and then select **Users**. Select a user, and then click **View Summary**.

The screenshot shows the Salesforce user detail page for 'EXAMPLE USER'. The breadcrumb trail is 'SETUP > USERS > EXAMPLE USER'. The user's status is 'Active'. Below the user details is the 'User Access Summary' section, which provides a list of permissions assigned to the user.

User Access Summary
See the permissions the user is assigned and the record access features the user is added to.

Navigation tabs: **User Permissions** | Object Permissions | Field Permissions | Custom Permissions | Public Group Membership | Queue Membership

185+ items

Label	API Name	Description
Send Email	EmailSingle	Send email to a single contact or lead.
Mass Email	EmailMass	Send mass emails to contacts and leads.
Edit Tasks	EditTask	Create, edit, and delete tasks.
Edit Events	EditEvent	Create, edit, and delete events.
Export Reports	ExportReport	Use Export Details and Printable View to export reports.
Import Personal Contacts	ImportPersonal	Import personal accounts and contacts.

SEE ALSO:

[IdeaExchange: Access Summary on User](#)

[Salesforce Help: View a User's Access Summary \(can be outdated or unavailable during release preview\)](#)



See Where a Public Group Is Used

Quickly find where a public group is used and the level of access its users get without running queries or clicking multiple features. For a specific public group, you can view the sharing rules an object is referenced in and the list views it's shared with in the new Public Group Access Summary. You can also see the report and dashboard folders that the public group can access and the other public groups it's included in. We delivered this feature thanks to your ideas on IdeaExchange.

Where: This change applies to Lightning Experience and Salesforce Classic (not available in all orgs) in Professional, Enterprise, Performance, Unlimited, and Developer editions.

How: From Setup, in the Quick Find box, enter *Public Groups*, and then select **Public Groups**. Select a public group, and then click **View Summary**.

The screenshot shows the 'All Americas Sales' public group summary page. At the top, it displays the breadcrumb 'SETUP > Public Groups > ALL AMERICAS SALES' and the group name 'All Americas Sales'. Below this is a metadata table:

API Name	Created By	Last Modified By
All Americas Sales	Agnes Admin	Agnes Admin
Grant Access Using Hierarchies	Created Date	Last Modified Date
Enabled	3/12/2024, 9:31 AM	4/4/2024, 11:25 AM

The main section is titled 'Public Group Access Summary' and includes a descriptive paragraph. Below the text are navigation tabs: 'Owner-Based Sharing Rules', 'Criteria-Based Sharing Rules', 'Report & Dashboard Folders', 'Included In Public Groups', and 'List Views'. The 'List Views' tab is active. It shows a search bar for 'Object Name' with 'Account (Account)' entered. Below the search bar, it indicates '3 items • Sorted by desc • Updated a few seconds ago'. A table lists the results:

Label ↓	API Name
Priority Accounts	Priority_Accounts
Overdue Accounts	Overdue_Accounts

SEE ALSO:

[IdeaExchange: Add "Where Is It Used?" Button for Public Group](#)

[Salesforce Help: View the Public Group Access Summary \(can be outdated or unavailable during release preview\)](#)



See What's Enabled in Permission Sets and Permission Set Groups (Generally Available)

It can be tricky to track all the permissions included in your permission sets and permission set groups. To make managing your users' access easier, you can now see all enabled object, user, field, and custom permissions on one page. You can also see which permission set groups include the permission set and vice versa. This feature, now generally available, includes some changes since the beta release. The summary page has an improved interface, and we added the ability to see included custom permissions and permission sets in permission set groups. We delivered this feature thanks to your ideas on IdeaExchange.

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 *Permission Sets*, and then select **Permission Sets**. Or, enter *Permission Set Groups*, and then select **Permission Set Groups**. Select a permission set or permission set group, and then click **View Summary**.

The screenshot shows the 'Permission Sets' page in Salesforce Setup. The breadcrumb trail is 'SETUP > PERMISSION SETS > ACCESS LEADS'. The page title is 'Permission Sets'. The main content area displays details for the 'Lead_Access' permission set:

- API Name:** Lead_Access
- License:** --
- Created By:** Example User
- Last Modified By:** Example User
- Namespace Prefix:** --
- Session Activation Required:** Not Required
- Created Date:** 3/29/2024, 9:46 AM
- Last Modified Date:** 3/29/2024, 9:48 AM
- Related Permission Set Groups:** 0
- Description:** Includes all permissions for managing leads.

Below the details is the 'Permission Set Information' section, which includes a tabbed interface for viewing permissions. The 'User Permissions' tab is selected, showing 6 items:

Label	API Name	Description
Edit Tasks	EditTask	Create, edit, and delete tasks.
Import Leads	ImportLeads	Import leads and update campaign history.
Manage Leads	ManageLeads	Change the status of multiple leads in a list view.
Transfer Leads	TransferAnyLead	Change a lead's owner.
Convert Leads	ConvertLeads	Convert leads into accounts, contacts, and opportunities.

SEE ALSO:

[IdeaExchange: Permissions View Associated to a Permission Set](#)

[Salesforce Help: View Permissions Enabled in a Permission Set or Permission Set Group \(can be outdated or unavailable during release preview\)](#)



Automate and Migrate User Access with User Access Policies (Generally Available)

Automate your users' assignments to permission sets, package licenses, public groups, and other access features based on criteria that you set. Create policies that automatically grant or remove access whenever users are created or updated. Or, easily migrate large sets of users to a new access setup in a single operation. User access policies, now generally available, include some enhancements since the Spring '24 release. You can now create 200 active policies, up from 20, and set the order in which active policies are run. We delivered this feature thanks to your ideas on IdeaExchange.

Where: This change applies to Lightning Experience and Salesforce Classic (not available in all orgs) in Enterprise and Unlimited editions.

How: From Setup, in the Quick Find box, enter *User Management Settings*, and then select **User Management Settings**. Turn on **User Access Policies**. To create or manage your user access policies, in the Quick Find box, enter *User Access Policies*, and then select **User Access Policies**.

SEE ALSO:

[Salesforce Help: User Access Policies \(can be outdated or unavailable during release preview\)](#)

[IdeaExchange: Permission Sets For Public Groups](#)

[IdeaExchange: Assign a Permission Set to a Profile](#)

[IdeaExchange: Allow Public Groups to Reference Profiles](#)

[IdeaExchange: Assign a Role to a Permission Set](#)

[IdeaExchange: Add Custom Permissions to Individual User, Group, or Role](#)

[IdeaExchange: Group Permission Sets - Dynamic Lists](#)

Update the Order Field for Existing User Access Policies

You can now specify which active user access policy is applied when a user meets the criteria for multiple policies by using the new Order field. Active user access policies created before Summer '24 were given order values based on their last-update date, but editing the order values to fit your requirements is recommended. Manual policies that aren't automated weren't given order values.

Where: This change applies to Lightning Experience and Salesforce Classic (not available in all orgs) in Enterprise and Unlimited editions.

How: From Setup, in the Quick Find box, enter *User Access Policies*, and then select **User Access Policies**. To edit the order value, select a user access policy, and then click **Edit Details**. If a user meets the criteria for multiple policies, the policy with the lowest order value is applied.

SEE ALSO:

[IdeaExchange Delivered: Automate and Migrate User Access with User Access Policies \(Generally Available\)](#)

[Salesforce Help: User Access Policies \(can be outdated or unavailable during release preview\)](#)



Allow Users to Freeze Users and Monitor Login History Without the Manage Users Permission

You can now grant the ability to freeze and unfreeze users by using the Freeze Users permission. You can also allow users to view and download login history with the Monitor Login History permission. With this permission, a user can access the login history related list on user records and view data in Login History reports with relevant report permissions. Previously, you assigned the Manage Users permission to enable these features for users, but it includes additional capabilities. For users currently assigned the Manage Users permission, the Freeze Users and Monitor Login History permissions are enabled automatically. We delivered this feature thanks to your ideas on IdeaExchange.

Where: This change applies to Lightning Experience and Salesforce Classic (not available in all orgs) in Professional, Enterprise, Performance, Unlimited, and Developer editions.

How: To assign these new permissions, add them to a permission set, and then assign the permission set to users who require these permissions.

SEE ALSO:

[Salesforce Help: Monitor Login History \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Freeze or Unfreeze User Accounts \(can be outdated or unavailable during release preview\)](#)

[IdeaExchange: Enable Managers to View Login History](#)

Find Content on Managing Users and Data Access in One Place

To make it easier to manage users and data access, we moved all related content to a single location in Salesforce Help. There you can find all Help content related to users, licenses, permissions, sharing, and more. We included content about managing external users and their access in Experience Cloud sites. We also expanded our guidance on troubleshooting access issues.

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

SEE ALSO:

[Salesforce Help: Manage Users and Data Access](#)

[Salesforce Help: Troubleshooting User Access Issues and Insufficient Privileges Errors](#)

Lightning App Builder

Use the new Blank Space component to customize field alignment on Dynamic Forms-enabled record pages. Show or hide individual tabs inside a Tabs component with visibility rules.

IN THIS SECTION:

[IdeaExchange Delivered: Use Blank Spaces to Align Fields on Dynamic Forms-Enabled Pages](#)

Customize field alignment in Dynamic Forms field sections with the new Blank Space component. Find it on the Fields tab when viewing Dynamic Forms-enabled Lightning record pages in the Lightning App Builder. You can use a blank space on its own to separate fields vertically inside a field section. To further enhance the alignment of your field section content, you can also use a blank space in conjunction with the field section property Align fields horizontally. We delivered this feature thanks to your ideas on IdeaExchange.

[IdeaExchange Delivered: Set Conditional Visibility for Individual Tabs in Lightning App Builder](#)

Customize tab visibility in the Lightning App Builder according to your business needs. You can set the conditions to dynamically show or hide an individual tab in the Tabs component. This change applies to tabs on LWC-enabled record pages. We delivered this feature thanks to your ideas on IdeaExchange.

[Create Rich Text Headings in Lightning App Builder](#)

Customize rich text on your Lightning pages by giving it style values such as Heading 1 and Heading 2 using the new dropdown menu in the Rich Text component editor. Assigning rich text a Heading value also makes that text accessible for users viewing your Lightning page with a screen reader.

[See Fields in Compact Density When Configuring a Lightning Record Page](#)

The Compact density setting is now respected in Lightning App Builder preview on Dynamic Forms-enabled pages. When Compact mode is enabled, the height of fields in field sections is shorter.



Use Blank Spaces to Align Fields on Dynamic Forms-Enabled Pages

Customize field alignment in Dynamic Forms field sections with the new Blank Space component. Find it on the Fields tab when viewing Dynamic Forms-enabled Lightning record pages in the Lightning App Builder. You can use a blank space on its own to separate fields vertically inside a field section. To further enhance the alignment of your field section content, you can also use a blank space in conjunction with the field section property **Align fields horizontally**. 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: For example, these two versions of the same field section contain account fields, with a blank space added below the Phone field. The left image shows the default behavior without **Align fields horizontally** selected. The blank space appears with a single row height.

On the right, the horizontal alignment setting was selected, causing the Website field to stay aligned horizontally with Parent Account instead of collapsing upward. The blank space height is now expanded to align with the row height of its neighbor, Billing Address.

Account Information	
Account Owner Madison Rigsby	Rating Hot
Account Name Edge Communications	Phone (512) 757-6000
Billing Address 312 Constitution Place Austin, TX 78767 USA Austin, TX	Website http://edgecomm.com
Parent Account	Ownership Public
Account Number CD451796	Type Customer - Direct
Account Site	Industry Electronics
Annual Revenue \$139,000,000	

Account Information	
Account Owner Madison Rigsby	Rating Hot
Account Name Edge Communications	Phone (512) 757-6000
Billing Address 312 Constitution Place Austin, TX 78767 USA Austin, TX	Website http://edgecomm.com
Parent Account	Ownership Public
Account Number CD451796	Type Customer - Direct
Account Site	Industry Electronics
Annual Revenue \$139,000,000	

A blank space component is considered a field and counts against the limit of 100 fields per region. It doesn't count against the component page limit.

SEE ALSO:

[Salesforce Help: Break Up Your Record Details with Dynamic Forms \(can be outdated or unavailable during release preview\)](#)



Set Conditional Visibility for Individual Tabs in Lightning App Builder

Customize tab visibility in the Lightning App Builder according to your business needs. You can set the conditions to dynamically show or hide an individual tab in the Tabs component. This change applies to tabs on LWC-enabled record pages. We delivered this feature thanks to your ideas on IdeaExchange.

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

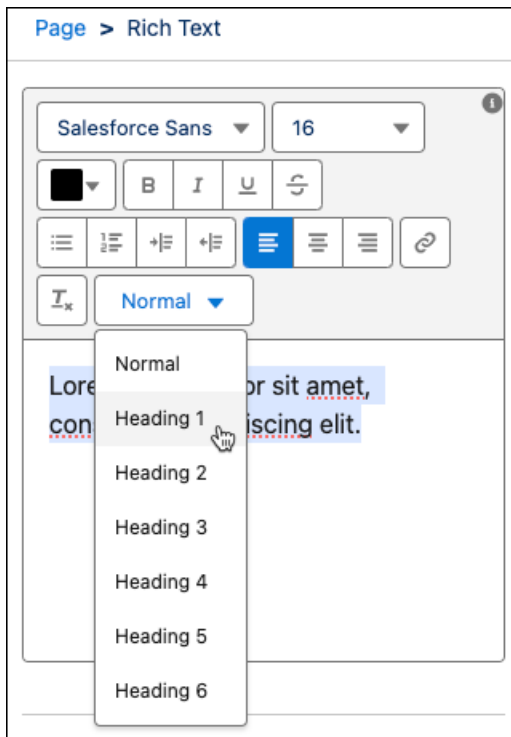
How: For a complete list of LWC-enabled objects, see [LWC Migration for Record Home Pages](#).

Create Rich Text Headings in Lightning App Builder

Customize rich text on your Lightning pages by giving it style values such as Heading 1 and Heading 2 using the new dropdown menu in the Rich Text component editor. Assigning rich text a Heading value also makes that text accessible for users viewing your Lightning page with a screen reader.

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

How: Open a custom Lightning page in the Lightning App Builder, and select a Rich Text component on the canvas. Select a block of text inside the editor, and use the new styling dropdown to give the text a heading value. For regular rich text, select the **Normal** setting.



See Fields in Compact Density When Configuring a Lightning Record Page

The Compact density setting is now respected in Lightning App Builder preview on Dynamic Forms-enabled pages. When Compact mode is enabled, the height of fields in field sections is shorter.

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

Globalization

Enforcement of ICU Locale formats continues on a rolling basis. The Zimbabwe Gold (ZiG) currency is available in Salesforce. Stay up to date with ICU and JDK locale formats.

IN THIS SECTION:

[Enable ICU Locale Formats \(Release Update\)](#)

To conduct business wherever you are, adopt the International Components for Unicode (ICU) locale formats. Locales control the formats for dates, times, currencies, addresses, names, and numeric values. ICU sets the international standard for these formats. The ICU locale formats provide a consistent experience across the platform and improve integration with ICU-compliant applications across the globe. When you enable this update, the ICU locale formats replace Oracle's Java Development Kit (JDK) locale formats in Salesforce. This update was first made available in Winter '20 and will be enforced on a rolling basis starting in Spring '24.

[Conduct Business with New Zimbabwe Gold Currency](#)

To help support your customers in Zimbabwe, the Zimbabwe Gold (ZiG) is available in Salesforce.

[Review Updated Label Translations](#)

To improve accuracy and your users' experience, we updated the translations for some standard object, tab, and field names for these languages: Chinese (Simplified), Danish, Dutch, Finnish, German, Greek, Hungarian, Japanese, Spanish, Spanish (Mexico), Norwegian, Russian, Slovenian, and Turkish.

[Evaluate the Impact of the Latest ICU and JDK Locale Updates](#)

Stay up to date with the latest locale formats from International Components for Unicode (ICU) and Oracle's Java Development Kit (JDK). For ICU, the date formats changed for the language-only locale Thai. For JDK, there are changes to the date formats for Arabic (Saudi Arabia) and changes to the date, time, currency, and accounting formats for Serbian locales, Tagalog locales, and Chinese (Malaysia). Whether you use the ICU or the JDK format, we recommend that you evaluate the changes that affect the locales that you use. Then test your filters, code, and components as needed.

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 option 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](#)

Conduct Business with New Zimbabwe Gold Currency

To help support your customers in Zimbabwe, the Zimbabwe Gold (ZiG) is available in Salesforce.

Where: This change applies to Lightning Experience, Salesforce Classic, and all versions of the Salesforce mobile app in all editions.

SEE ALSO:

[Salesforce Help: Supported Currencies \(ICU\)](#)

[Salesforce Help: Supported Currencies \(JDK\)](#)

Review Updated Label Translations

To improve accuracy and your users' experience, we updated the translations for some standard object, tab, and field names for these languages: Chinese (Simplified), Danish, Dutch, Finnish, German, Greek, Hungarian, Japanese, Spanish, Spanish (Mexico), Norwegian, Russian, Slovenian, and Turkish.

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 Summer '24 Updated Label Translations](#) and download the attached list. If you want to use a different translation for tab and field labels, you can change the name using the Rename Tabs and Labels functionality.

SEE ALSO:

[Salesforce Help: Rename Object, Tab, and Field Labels \(can be outdated or unavailable during release preview\)](#)

Evaluate the Impact of the Latest ICU and JDK Locale Updates

Stay up to date with the latest locale formats from International Components for Unicode (ICU) and Oracle's Java Development Kit (JDK). For ICU, the date formats changed for the language-only locale Thai. For JDK, there are changes to the date formats for Arabic (Saudi Arabia) and changes to the date, time, currency, and accounting formats for Serbian locales, Tagalog locales, and Chinese (Malaysia). Whether you use the ICU or the JDK format, we recommend that you evaluate the changes that affect the locales that you use. Then test your filters, code, and components as needed.

Where: These changes apply to Lightning Experience, Salesforce Classic, and all versions of the mobile app in all editions except Database.com.

SEE ALSO:

[Knowledge Article: Java Development Kit \(JDK\) Locale Format Changes in Summer '24](#)

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

General Setup

Get explanations for formulas and fix syntax errors with Einstein for Formulas. Use a new step in the custom field creation wizard to automatically add new custom fields to your Dynamic Forms-enabled record pages. Block users with only the Manage Public List Views permission from seeing roles and role hierarchies when they edit public list views.

IN THIS SECTION:

[Fix Formula Syntax Errors with Einstein for Formulas](#)

Einstein for Formulas now helps you fix syntax errors in a formula in addition to providing an explanation for a formula that's used in Formula fields, default field values, and record validation rules. Create a formula or use an existing Salesforce formula in the Formula Editor and get an explanation generated. For any syntax errors in the formula, use the fixed formula suggested by Einstein.

[Add New Custom Fields to Dynamic Forms-Enabled Pages](#)

Quickly and easily add a new custom field to your Dynamic Forms-enabled pages by using a new step in the custom-field creation wizard.

[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 was first available in Spring '24 and was scheduled to be enforced in Winter '25, but we postponed the enforcement date to Spring '25. If your organization doesn't use roles, this update has no impact.

[Register More API Specifications with Support for YAML](#)

Register External Services-compliant OpenAPI 2.0 or 3.0 specifications with either JSON or YAML formatting. Note that YAML-formatted specifications are subject to a maximum size limit of 3 MB. Previously, you could register only JSON-formatted specifications.

[Access More External Data Types with the Custom Adapter for Salesforce Connect](#)

Enhancements to the Apex Connector Framework help you connect your users to more external data when you develop your own custom adapter for Salesforce Connect. With support for more external object field types, your users can work with and search across a richer set of external data directly in Salesforce.

[See Required Fields at a Glance on Aura-Based Page Views](#)

When you create, edit, or clone records on Aura-based pages on a desktop, a message now tells you that fields with asterisks are required.

[Get Improved Accessibility in List Views](#)

Learn about small but important changes that make list views more accessible.

[Get Better Performance for List Views](#)

To improve performance and meet the latest accessibility standards, list views for custom objects in sandboxes now render with Lightning Web Components (LWC) instead of Aura. LWC, Salesforce's newest framework, delivers your data faster and makes the latest features available for your list views. List views for standard objects, such as accounts, still render with Aura.

[Review Updated URLs for List Views](#)

To support rendering list views for custom objects with Lightning Web Components (LWC), every list view URL now identifies the list view by its API Name rather than by its ID. The API Name is an automatically assigned unique identifier based on the list view's original name. Additionally, when you select your Recently Viewed list, the URL uses the parameter `__Recent` instead of `Recent`. Review and update any business processes that rely on details from the list view URL.

[See Record Fields in Two Columns on Tablets](#)

If you have Dynamic Forms on Mobile enabled, the Record Detail - Mobile and Field Section components now display fields in two columns when viewed on a tablet. Previously, fields in these components displayed in only one column when viewed on a tablet even if they were configured with two columns.

[See Dynamic Forms-Enabled Lightning Page Information for Custom Fields](#)

You can now successfully view the Lightning page information for custom fields in use on Dynamic Forms-enabled pages via the Where is this used? button. In the Where is this used? list, a link to a Lightning page associated with a FlexipageFieldInstance reference type correctly routes you to the details for that page. Previously, clicking a Lightning page link for a FlexipageFieldInstance reference type resulted in an error.

[Rich Text Field Images No Longer Overflow Their Column Boundaries](#)

In Spring '24, we fixed the Aura Record Detail component so that Rich Text Area fields containing images wider than the column they reside in no longer cause their content to overflow into neighboring columns.

Fix Formula Syntax Errors with Einstein for Formulas

Einstein for Formulas now helps you fix syntax errors in a formula in addition to providing an explanation for a formula that's used in Formula fields, default field values, and record validation rules. Create a formula or use an existing Salesforce formula in the Formula Editor and get an explanation generated. For any syntax errors in the formula, use the fixed formula suggested by Einstein.

Where: This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions. Einstein generative AI is available in Lightning Experience.

Why: The formula syntax checker identifies syntax errors in a formula but doesn't provide a solution to fix them. Einstein for Formulas addresses this limitation by providing a fixed formula that you can use in the Formula Editor.

How: To fix a syntax error in a formula you entered in the Formula Editor, click **Use Formula Assistant** and Einstein suggests a fixed formula for you.

Add New Custom Fields to Dynamic Forms-Enabled Pages

Quickly and easily add a new custom field to your Dynamic Forms-enabled pages by using a new step in the custom-field creation wizard.

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

How: Create a custom field as usual in Setup. After setting field-level security, you see the new step to select which Lightning record pages to add the field to.

Contact Help for this Page ?

New Custom Field

Step 4. Add to Dynamic Forms-enabled record pages Step 4 of 5

Field Label Working Hours
 Data Type Text
 Field Name Working_Hours
 Description

Select the Dynamic Forms-enabled record pages to add the field to. The field is added as the last field in the first field section on the selected pages.
 You can change the field's location on the page in the Lightning App Builder.

<input checked="" type="checkbox"/> Add Field	Lightning Record Page Label	API Name
<input checked="" type="checkbox"/>	Contact Page	Test_Contact_Page

The new field is added to each record page you select as the last field in the first field section on the page.

If there aren't any Dynamic Forms-enabled pages for the object for which the field is being created, then the new step doesn't appear.

SEE ALSO:

[Salesforce Help: Create Custom Fields \(can be outdated or unavailable during release preview\)](#)

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 was first available in Spring '24 and was scheduled to be enforced in Winter '25, but we postponed the enforcement date to Spring '25. If your organization doesn't use roles, this update has no impact.

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.

Why: This security update blocks users with only the Manage Public List Views permission from seeing roles and role hierarchies when they edit public list views.

How: To edit public list views, a user needs the Manage Public List Views permission. After you enable this update, so that users can make list views visible to roles, grant them the View Roles and Role Hierarchy permission as well. Alternatively, have a user who already has the View Roles and Role Hierarchy permission grant access to list views. A user with only the Manage Public List Views permission can still make a list view visible to Public Groups or set a list view to fully public or private.

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](#)

Register More API Specifications with Support for YAML

Register External Services-compliant OpenAPI 2.0 or 3.0 specifications with either JSON or YAML formatting. Note that YAML-formatted specifications are subject to a maximum size limit of 3 MB. Previously, you could register only JSON-formatted specifications.

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

SEE ALSO:

[Salesforce Help: OpenAPI 2.0 and 3.0 Support \(can be outdated or unavailable during release preview\)](#)

Access More External Data Types with the Custom Adapter for Salesforce Connect

Enhancements to the Apex Connector Framework help you connect your users to more external data when you develop your own custom adapter for Salesforce Connect. With support for more external object field types, your users can work with and search across a richer set of external data directly in Salesforce.

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

How: To use the Apex Connector Framework to map external data to Salesforce external objects, create or update a `DataSource.Connection` Apex class. The newly supported external object field types include:

- Currency
- Date
- Email
- Percent
- Phone

SEE ALSO:

[Salesforce Help: Access External Data with a Custom Adapter for Salesforce Connect \(can be outdated or unavailable during release preview\)](#)

[Apex Developer Guide: Get Started with the Apex Connector Framework \(can be outdated or unavailable during release preview\)](#)

[Apex Reference Guide: DataType Enum \(can be outdated or unavailable during release preview\)](#)

See Required Fields at a Glance on Aura-Based Page Views

When you create, edit, or clone records on Aura-based 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 for LWC-enabled objects and in the top right for Aura-based objects.

Most standard objects are LWC-enabled, but a few still use Aura. This enhancement applies to the few Aura-based objects, such as Campaigns, Products, and Tasks. For a complete list of LWC-enabled objects, see [LWC Migration for Record Home Pages](#). If you don't see an object on this list, then it still uses Aura.

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.

- Screen readers announce the text in the new chart window in a more logical order. Additionally, screen readers clearly announce the start of a table data when reading the contents of an existing chart.
- The pin list button always includes the name of the list view for screen readers, whether the list is pinned or not.
- The chart and filter buttons now display tooltips when they have focus.
- Introduced in Spring '24, users with an activated screen reader can navigate related lists with the key combination Ctrl+Alt+arrow key (Windows) or Cmd+Option+arrow key (macOS).



Get Better Performance for List Views

To improve performance and meet the latest accessibility standards, list views for custom objects in sandboxes now render with Lightning Web Components (LWC) instead of Aura. LWC, Salesforce's newest framework, delivers your data faster and makes the latest features available for your list views. List views for standard objects, such as accounts, still render with Aura.

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

When: This update is available on a rolling basis starting in Summer '24.

How: List view pages for custom objects include these minor changes, but overall, how your users work in list views hasn't changed.

- The List Views dropdown menu displays up to 100 lists and shows Recent List Views and the option to search your lists at the top of the dropdown. If you have more than 100 list views, use search terms to find a specific list.
- Keyboard navigation for the List Views dropdown menu starts with focus at the top of the list rather than on the currently pinned list.
- Some icons and highlights, such as the check mark next to a selected list in the List Views dropdown menu and the  icon, have updated colors. Additionally, the color, size, alignment, and capitalization of some windows, buttons, and dropdown menus have changed.
- The Filters panel has new button options in the add or edit filters work flows. Cancel to exit the add or edit filter flow, and Save to apply your changes. You can still click outside of the panel or press the Escape key to close the panel. When you add or edit a filter, the Value menu closes each time you select an option from it. Options appear below the Value menu as you select them. To remove an existing filter, click the  icon.
- When you edit filter logic, the Cancel and Save buttons don't appear in the Filters panel until you click outside of the Filter Logic text field. Your filter logic is checked for errors when you save your changes.
- When you create a filter that uses a location-based field, the values that you select initially show as the full location name in the Filters panel. After you save your changes, the values convert to an abbreviated form, such as CA for California or NV for Nevada.

- After you add a filter, keyboard focus returns to the Add Filter button. After you edit a filter, keyboard focus returns to the edited filter.
- Header icons in columns and fields don't render.
- Some errors and in-app messages appear in updated locations or formats and with new wording.

For example, after a save, a field-level error previously appeared directly below the affected input field. Now, a field-level error appears to the left of the row and includes the affected field's name.

Some errors occur before you save. With this type of error, the error message appears below the input field in the edit panel, and the field reverts to its original value if you close the panel before fixing the issue.

Review Updated URLs for List Views

To support rendering list views for custom objects with Lightning Web Components (LWC), every list view URL now identifies the list view by its API Name rather than by its ID. The API Name is an automatically assigned unique identifier based on the list view's original name. Additionally, when you select your Recently Viewed list, the URL uses the parameter `__Recent` instead of `Recent`. Review and update any business processes that rely on details from the list view URL.

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

How: To see the updated URL format, visit a saved list view and check the URL after `filterName`. Instead of a generic alphanumeric string, the parameter now shows an API-friendly version of the list view's name. When you visit your Recently Viewed list, you see `__Recent` after `filtername`.

If you click a saved link or bookmark that uses the previous URL format to visit the list view for a custom object rendered with LWC, then you're redirected to the new URL. If you click a saved link or bookmark that uses the previous URL format to visit the list view for an object rendered with Aura, then the previous URL is accepted.

See Record Fields in Two Columns on Tablets

If you have Dynamic Forms on Mobile enabled, the Record Detail - Mobile and Field Section components now display fields in two columns when viewed on a tablet. Previously, fields in these components displayed in only one column when viewed on a tablet even if they were configured with two columns.

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

SEE ALSO:

[Salesforce Help: Enable Dynamic Forms on Mobile \(can be outdated or unavailable during release preview\)](#)

See Dynamic Forms-Enabled Lightning Page Information for Custom Fields

You can now successfully view the Lightning page information for custom fields in use on Dynamic Forms-enabled pages via the Where is this used? button. In the Where is this used? list, a link to a Lightning page associated with a `FlexipageFieldInstance` reference type correctly routes you to the details for that page. Previously, clicking a Lightning page link for a `FlexipageFieldInstance` reference type resulted in an error.

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

How: From Setup, select **Object Manager** > *Object Name* > **Fields & Relationships**. Click the name of a custom field used on a Lightning page that uses Dynamic Forms, and then click **Where is this used?**

The screenshot shows the Salesforce interface for the 'Account' object. The breadcrumb is 'SETUP > OBJECT MANAGER'. The left sidebar has a 'Fields & Relationships' section highlighted. The main content area is titled 'Where is this used? Business Hours' and includes a table of field references.

Reference Type	Reference Label
FlexipageFieldInstance	Account Record Page for Inside Sales
Layout	Account Layout

Rich Text Field Images No Longer Overflow Their Column Boundaries

In Spring '24, we fixed the Aura Record Detail component so that Rich Text Area fields containing images wider than the column they reside in no longer cause their content to overflow into neighboring columns.

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

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.

IN THIS SECTION:

[Data Cloud Features Released by Month](#)

Data Cloud features and changes are released as often as monthly, so check back again soon for the latest solutions. Changes included in the Summer '24 release are generally listed under June.

[AI in Data Cloud](#)

Let Einstein do the hard work and autoselect the capabilities that can best influence a predictive outcome. As you build your predictive model, use data and training alerts to improve its quality. Manage your AI models with the enhanced UI and permissions. Explore the new large language models and how they can help power your generative AI using Prompt Builder. For more comprehensive AI capabilities, switch to the new Einstein Studio experience.

[Edit a Data Graph](#)

Add related objects and fields to an existing data graph. Save it as a draft and make more changes before building the updated data graph. You can also include data graph metadata in a data kit and copy it to another org instead of manually recreating the metadata. And now you can access data from a data graph through an invocable action in a flow.

[Access Data from Amazon Redshift and Databricks with BYOL Data Federation](#)

Use Bring Your Own Lake (BYOL) data federation to securely view and consume data from Amazon Redshift and Databricks 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 external information, you can build rich, accurate profiles to establish a single source of truth and eliminate expensive integration processes.

[Ingest More Data into Data Cloud with New Third-Party Connectors \(Beta\)](#)

Import data from a growing list of external databases and applications into Data Cloud for harmonization. You can now ingest data from Adobe Analytics, Apache Hive, Asana, Azure Cosmos DB, eBay Analytics, Google Contacts, Google Drive, Google Spanner, GraphQL, IBM Cloud Object Storage, IBM Informix, Microsoft Dynamics 365, Oracle Eloqua, PayPal, SendGrid, Snapchat Ads, Spark SQL, and SugarCRM.

[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 by using secondary lookup keys. Use Query API V1 to query data graphs.

[Get Faster Segment Counts with Approximate Segment Population](#)

When building a segment, get a quick estimate of the population count to validate your segment rules. Use the new Approximate Segment Population field to confirm that the segment count meets your expectations. You can then adjust your segment rules and save your segment to get the final segment population.

[Prioritize Campaigns with Waterfall Segments \(Generally Available\)](#)

When running a campaign with multiple offers, use a waterfall segment to create a hierarchical structure and prioritize your campaigns. For example, you have four different discounted offers, but you don't want a customer to receive more than one offer. To target your campaign, create a prioritized list of mutually exclusive segments so that an audience member exists in only one subsegment of your waterfall and receives only one promotional offer. You can also rearrange subsegments in your waterfall to adjust the priority. This feature, now generally available, includes some changes since the last release.

[Create Segments with Fewer Clicks](#)

Create segments faster using the provided default values for the data space, segment on, schedule, segment type fields, and aggregation operator. If there's only one possible value, Data Cloud sets it for you. For fields with multiple values, the most common choice is the default.

[Rapidly Publish Segments to Hyperscaler Targets](#)

In addition to the Marketing Cloud activation target, you can now use rapid segment publish for activations to all hyperscaler targets, such as Amazon S3, SFTP, Google Cloud Storage, and Microsoft Azure Storage.

[Define Segment Filters Based on Aggregate Values Across Multiple Levels \(Pilot\)](#)

Get a more comprehensive view of your data with hierarchical aggregation, which rolls up revenues for accounts and their subsidiaries. Use the aggregated values to create more precise and meaningful segment filters.

[Optimize Campaigns by Ranking and Limiting the Segment Audience \(Pilot\)](#)

Efficiently manage fixed-size campaigns by reusing segmented audiences. Rank segment members based on preferred attributes and insights to select the most promising leads for a campaign.

[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.

[Use Segments in a Data Kit](#)

You can now add a segment to a data kit or create a segment through a data kit. Instead of creating a segment from scratch, use a predefined segment from a data kit. You can also edit and fine-tune the segment.

[Apply Filters to Contact Points and the Activation Membership \(Generally Available\)](#)

Pinpoint the target audience for specific campaign goals by using activation membership filters to have more control on your target audience. With contact point filtering, you can now apply consent filters to target contact points based on your audience preference.

[Use More Objects for Copy Field Enrichments](#)

You can now create and manage copy field enrichments for contacts, leads, accounts, and assets. Previously, you could only manage copy field enrichments for Contact and Lead objects in Object Manager. Calculated insight objects (CIO) must have a single, Individual ID as the dimension, but you can't use multidimensional objects. For example, you can't add a field for Lifetime Value that's copied from a calculated insight object.

[Data Cloud Related List Enrichments Now Support Accounts](#)

Data Cloud Related List Enrichments now offer support for Account objects.

[Enrich Most Objects in Your Org With Data Cloud Data](#)

You can now copy Data Cloud data into more objects in your org from Setup. Previously, you could copy data into the Contact and Lead objects from Object Manager.

[Enrich Data Actions Using Data Graphs](#)

Add more details or context to a primary engagement object by pulling in the relevant data from a connected data graph. Then, send the entire payload as events to Marketing Cloud, core platform, and webhook destinations.

[Run Batch Data Transforms at Custom Time Intervals](#)

Tailor data updates to your needs by scheduling a transform to run at daily and hourly intervals in your preferred time zone. Previously, scheduling was limited to hourly intervals in the scheduler's local time zone.

[Enhance Row Security in Batch Data Transforms](#)

To ensure accuracy and data uniqueness, generate a UUID for each row in a table to maintain distinct values. As you combine data from various sources within a batch data transform, you can potentially duplicate or overwrite rows that contain similar ID values.

[Run Batch Data Transforms with No Downtime](#)

You can now run a sequence of batch data transforms one after the other without scheduling by using a flow. After a batch data transform completes, the next one starts immediately.

[Refresh Data More Frequently with Incremental Refresh in BYOL Data Federation](#)

Access only new or updated data from a third-party partner, reducing latency and cost. You no longer need to perform a full refresh to update your data. With incremental refresh, you can update your data every 15 mins to 7 days as opposed to every 4 hrs to 7 days.

[Edit an Output Node in a Batch Data Transform](#)

Add a column to a data model object (DMO) output node without leaving the editor. Previously, to change a DMO, you needed to leave the batch data transform and go to the Data Model Objects tab to add a column.

[Modify Streaming Data Transforms](#)

You can now change a streaming data transform's name and SQL expression. Changes affect the incoming data as soon as you save.

[Refresh a Streaming Data Transform](#)

When you update a streaming data transform, you can now apply the changes to all your data—current and incoming—by rebuilding the target data lake object.

[Improve Data Quality by Monitoring Problem Record Metrics](#)

Records that aren't ingested into Data Cloud due to data quality issues are now logged in a problem records data lake object (DLO). A problem records DLO is generated each time a data stream is created and is deleted if the data stream is deleted. You can also query and map the problem records DLO just like any other DLO to identify and address data quality issues.

[Bring Inventory Data into Data Cloud with the Omnichannel Inventory Connector](#)

Omnichannel Inventory tracks inventory availability across locations and selling channels, making stock management and customer order fulfillment a breeze. Use the Omnichannel Inventory Connector to ingest your inventory data into Data Cloud and unlock valuable inventory insights and predictions.

[Customize Web Pages in Real Time](#)

Wow your customers by processing user engagement data in profile data in milliseconds to enable next-page personalization. With real-time identity resolution, real-time calculated insights, and real-time segmentation built on real-time data graphs, you can match profiles, generate metrics and segments, and return profile data while a customer is actively browsing.

[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.

[Connect Unstructured Data in Data Cloud](#)

Connect unstructured data in Data Cloud and create search index configurations to prepare that data for vector search. With unstructured data and vector search, you can create more customer-focused results in your searches and queries across Salesforce gen AI, automation, and analytics tools.

[Import data from the Adobe Marketo Engage connector to Data Cloud](#)

Use the Adobe Marketo Engage Connector to import campaigns, leads, and lead activities data from Adobe Marketo.

[Experience Faster Salesforce CRM Connector Refreshes](#)

With the support of stream processing, data stream deployment and change events are optimized to process data with minimal latency. Stream processing is available for standard objects, such as Account, Contact, Lead, and Opportunity, and all custom objects.

[Identify Your Salesforce CRM Orgs Using an Alias](#)

Assign an alias to your Salesforce CRM connections so that you can easily identify, search, and filter for your orgs.

[Use Identity Provider Authentication for S3 Connectors](#)

Get a more secure and streamlined connection experience with identity provider (IdP) authentication when ingesting data from an S3 bucket. Manage credentials more easily with enhanced security protocols.

[Deploy Data Kit Components with Autolaunched Flows](#)

Deploy all data kits components together to a target org using REST API. The API triggers the **Deploy Data Kit Components** flow to deploy each component sequentially. Before moving to the next component, the flow waits for the deployment status of the previous component. Previously, you deployed each data kit component by going to their individual tabs.

[Work with Data Cloud in a Sandbox Org \(Beta\)](#)

You can now test and explore Data Cloud features in a sandbox org. The sandbox is a copy of your production org that you can use for testing, training, or creating customizations. When you create a sandbox, all your production org Data Cloud metadata and configurations are replicated in the sandbox.

[Deploy Data Cloud Changes from a Sandbox to Production \(Beta\)](#)

You can now deploy changes back to your production org by adding the modified Data Cloud components to a data kit and then adding that data kit to a change set. You then follow the standard process to upload and deploy the change set in your production org. In the production org, you can deploy the data kit components with a single click.

[Improve Search Accuracy with Hybrid Search \(Beta\)](#)

Combine semantically aware vector search with the ability of keyword search to handle domain vocabulary and provide users the most relevant results. Hybrid search merges the retrieved information from both searches and then ranks the results to show the most relevant information. You can also influence the search results by configuring ranking factors, such as record recency or popularity.

[Cross Cloud Updates for Data Cloud](#)

Our latest round of cross-cloud features for Data Cloud.

[Organize Segment Intelligence Data With Data Spaces](#)

You can now choose an additional data space for Segment Intelligence, offering greater flexibility for segmenting your data. Previously, you could only use the default data space.

[Optimize Monetary Data Management with the Currency Data Type](#)

Use the currency data type to manage different currencies in your data. The data type supports multiple currencies and lets you manage both the currency of your corporate headquarters and additional currencies as needed. Multicurrency support, along with built-in currency conversion makes it easy to choose and operate in your preferred currency.

[Transcribe and Index Audio and Video Files \(Beta\)](#)

Simplify search and retrieval of audio and video data by transcribing and indexing content automatically in Data Cloud. You can then query transcriptions to retrieve relevant information or similar items based on the text. The supported audio formats are FLAC, MP3, and WAV. The supported video formats are AVI, MOV, and MP4. Transcriptions are created using the whisper-small model.

[Add Context to Chunks with Prepend Fields](#)

When you need to add additional fields or metadata to provide context for a chunk, use prepend fields. For example, the Description field in a knowledge article could exceed the optimal chunk size for prompt-based retrieval. By prepending the Title field to the chunk, you can provide more context in the prompt results. Add prepended fields on standard DMOs in the search index advanced setup.

[Supercharge Your AI Usage with Retrieval Augmented Generation \(RAG\)](#)

Augment your prompts with Retrieval Augmented Generation (RAG) in Data Cloud. You can now augment prompt templates with unstructured content organized in the vector database in Data Cloud. Surface relevant information in your prompts from proprietary data, such as emails, meeting notes, service replies, article answers, and other types of unstructured content. By augmenting the prompt with accurate, current, and pertinent information, RAG improves the relevance and value of LLM responses for users.

SEE ALSO:

[Salesforce Help: Data Cloud Release Notes Changes](#)

Data Cloud Features Released by Month

Data Cloud features and changes are released as often as monthly, so check back again soon for the latest solutions. Changes included in the Summer '24 release are generally listed under June.

Feature	Release Note
August '24	
Build and Share	Deploy Data Kit Components with Autolaunched Flows
Data Streams	Improve Data Quality by Monitoring Problem Record Metrics
Unstructured Data	Transcribe and Index Audio and Video Files (Beta)
Search Index	Add Context to Chunks with Prepend Fields
Segmentation	Use Segments in a Data Kit
Segmentation	Define Segment Filters Based on Aggregate Values Across Multiple Levels (Pilot)
Einstein Studio	Create and Customize Retrievers in Einstein Studio
RAG in Data Cloud	Supercharge Your AI Usage with Retrieval Augmented Generation (RAG)

Feature	Release Note
July '24	
Real Time	Customize Web Pages in Real Time
Segment Intelligence	Organize Segment Intelligence Data With Data Spaces on page 228
Data Graphs	Edit a Data Graph
Segmentation	Get Faster Segment Counts with Approximate Segment Population
Segmentation	Create Segments with Fewer Clicks
Einstein Studio	Leverage Alerts to Evaluate the Quality of Your Predictive Model
Einstein Studio	Let Einstein Autoselect the Best Factors for Your Use Case
Einstein Studio	Evaluate Your Model Performance with Activity Metrics
Einstein Studio	Access Models Quicker with the Updated Einstein Studio Navigation
Einstein Studio	Einstein Studio Legacy Tab Is No Longer Available in Data Cloud
Connect Data	Ingest More Data into Data Cloud with New Third-Party Connectors (Beta)
Hybrid Search	Improve Search Accuracy with Hybrid Search (Beta)
June '24	
Segmentation	Prioritize Campaigns with Waterfall Segments (Generally Available)
Activation	Apply Filters to Contact Points and the Activation Membership (Generally Available)
Connect Data	Bring Inventory Data into Data Cloud with the Omnichannel Inventory Connector
Connect Data	Import data from the Adobe Marketo Engage connector to Data Cloud
Connect Data	Experience Faster Salesforce CRM Connector Refreshes
Connect Data	Identify Your Salesforce CRM Orgs Using an Alias
Data Transforms	Run Batch Data Transforms at Custom Time Intervals
Data Transforms	Enhance Row Security in Batch Data Transforms
Data Transforms	Run Batch Data Transforms with No Downtime
Data Transforms	Edit an Output Node in a Batch Data Transform
Data Transforms	Modify Streaming Data Transforms
Data Transforms	Refresh a Streaming Data Transform
Unstructured Data	Enhance Your AI and Automation Strategies with Unstructured Data in Data Cloud
Unstructured Data	Use Vector Search in Generative AI, Automation, and Analytics Tools
Data Model	Get a list of activation records from Audience data model objects (DMOs). See New and Changed Connect REST API Resources
May '24	

Feature	Release Note
Enrich Your Org	Data Cloud Related List Enrichments Now Support Accounts
Enrich Your Org	Enrich Most Objects in Your Org With Data Cloud Data
Data Actions	Enrich Data Actions Using Data Graphs

AI in Data Cloud

Let Einstein do the hard work and autoselect the capabilities that can best influence a predictive outcome. As you build your predictive model, use data and training alerts to improve its quality. Manage your AI models with the enhanced UI and permissions. Explore the new large language models and how they can help power your generative AI using Prompt Builder. For more comprehensive AI capabilities, switch to the new Einstein Studio experience.

IN THIS SECTION:

[Manage AI Models in Einstein Studio](#)

Users can create, update, and delete models with the new Allow users to manage models in Einstein Studio permission, which is available for permission sets.

[Power Your Generative AI Using Anthropic Models with Prompt Builder](#)

Accelerate your business goals with the hyper-intelligent and fast Anthropic models hosted on Amazon Bedrock. Use your model with Prompt Builder and other apps to deliver generative AI for your use case. You can use the Anthropic Claude 3 Haiku Salesforce-enabled model, which works within the boundaries of the Einstein Trust Layer, to ensure data privacy and security. Or, bring your own large language model and use Amazon Bedrock to establish a secure endpoint connection.

[Power Your Generative AI with Google Gemini and Prompt Builder](#)

Use the reliable, efficient, and highly intelligent Google Gemini model to drive your generative AI use cases. Leverage the power of your Salesforce data and use the insights to deliver innovative solutions for your customers. Bring your own large language model and use Google Cloud Vertex AI to establish a secure endpoint connection.

[Leverage Alerts to Evaluate the Quality of Your Predictive Model](#)

Einstein Studio provides alerts to help you manage data discrepancies and issues that can occur during model training. Act on and resolve your alerts to build, retrain, and deploy models that can deliver more accurate predictions. You can review the alerts on the model details page, in model settings, and on the model activity tab.

[Let Einstein Autoselect the Best Factors for Your Use Case](#)

Einstein saves you time and intelligently selects the most relevant variables and recommended algorithm for a use case.

[Evaluate Your Model Performance with Activity Metrics](#)

Use activity metrics to understand the performance of your predictive or generative model. View a summary of the total number of inferences over different time periods and gain insights into your connection, timeout, and authentication errors. In Model Builder, select the activated model, and go to the Activity tab to view its metrics.

[Access Models Quicker with the Updated Einstein Studio Navigation](#)

You can now access models from a centralized location. Use the sidebar to locate models and open the model library. You can also view and manage predictive and generative models from their respective tabs.

[Einstein Studio Legacy Tab Is No Longer Available in Data Cloud](#)

The new Einstein Studio tab in Data Cloud is now your home base for creating and connecting your AI models. Previously, you could also access model building capabilities on the Einstein Studio (Legacy) tab. We replaced this tab with one experience that provides access to more enhanced AI capabilities, such as predictive and generative AI models and activity metrics. You also get data, model, and training alerts.

[Data Cloud Einstein Lookalikes in Segmentation Is Being Retired](#)

The Data Cloud Einstein Lookalike Segments feature will no longer be available as of September 27, 2024. To prevent stale user information and data, delete your lookalike segments created by Einstein before the shutoff date.

[Focus on Relevant Attributes When Creating Einstein Segments](#)

Attributes are now grouped into suggested and additional sections so that you can zero in on the attributes that are most relevant to your description. The suggested attributes appear at the top. The additional attributes listed aren't directly relevant to your description. You can select attributes from both sections.

[Get Optimized Segment Results with Einstein Data Prism](#)

Einstein Data Prism works behind the scenes to enrich the Data Cloud schema with semantic descriptions. Data Prism correlates the natural language phrases used in segment creation and your Data Cloud data, producing more accurate and relevant results. Einstein Data Prism is automatically enabled with Einstein Segment Creation.

[Create and Customize Retrievers in Einstein Studio](#)

Einstein Studio now allows you to manage custom retrievers so that you can augment prompts with search results that ground large language models (LLMs) and their responses in proprietary data. When added to a prompt template, at run time, a retriever gets relevant facts from text indexed in a vector database, and augments the prompt with the retrieved information before submitting to the LLM. Every retriever is linked to a search index that is created in Data Cloud. Custom retrievers refine the search criteria and get the most relevant information to augment the prompt.

Manage AI Models in Einstein Studio

Users can create, update, and delete models with the new Allow users to manage models in Einstein Studio permission, which is available for permission sets.

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 starting in June 2024.

Permission Set
Data Cloud Admin

Find Settings... | Clone | Manage Assignments | View Summary

Permission Set Overview > System Permissions

System Permissions

System

Permission Name	Enabled	Description
Access Data Cloud Data Explorer	<input checked="" type="checkbox"/>	Allows user access Data Cloud Data Explorer.
Access Data Cloud Profile Explorer	<input checked="" type="checkbox"/>	Allows user access Data Cloud Profile Explorer.
Access Personalization Platform	<input type="checkbox"/>	Access the Personalization Platform and its entities.
Allows user access Data Cloud	<input checked="" type="checkbox"/>	Allows user access Data Cloud.
Allows user access Data Cloud setup menu	<input checked="" type="checkbox"/>	Allows user access Data Cloud setup menu
Allow users to manage models in Einstein Studio	<input checked="" type="checkbox"/>	Allows users to create, update, and delete models in Einstein Studio.
Allow user to modify Private Connections	<input checked="" type="checkbox"/>	Allow users to modify Private Connections through the Metadata, Tooling, and Connect APIs.
Configure Dataspace Scope	<input checked="" type="checkbox"/>	Grants users access to view, create, edit, and delete a restriction rule for a Dataspace Scope
Lightning Experience User	<input checked="" type="checkbox"/>	Access Lightning Experience and switch between Lightning Experience and Salesforce Classic.
Manage Dataspace Scope	<input checked="" type="checkbox"/>	Grants users access to view, create, edit, and delete a Dataspace Scope
View DeveloperName	<input checked="" type="checkbox"/>	View the DeveloperName field via the API.

Power Your Generative AI Using Anthropic Models with Prompt Builder

Accelerate your business goals with the hyper-intelligent and fast Anthropic models hosted on Amazon Bedrock. Use your model with Prompt Builder and other apps to deliver generative AI for your use case. You can use the Anthropic Claude 3 Haiku Salesforce-enabled model, which works within the boundaries of the Einstein Trust Layer, to ensure data privacy and security. Or, bring your own large language model and use Amazon Bedrock to establish a secure endpoint connection.

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 starting in July 2024.

How: To use Einstein generative AI models, turn on Einstein generative AI features in Setup.

Einstein Studio

Models

Search models... | Add Predictive Model | Add Foundation Model

Model Name	Type	Capability	Last Modified On	Last Modified By
Default GPT 4 Omni configured model	Standard Configuration	Chat Completion		
Azure OpenAI GPT 3.5 Turbo	Standard Configuration	Chat Completion		
Azure OpenAI GPT 3.5 Turbo 16k	Standard Configuration	Chat Completion		
Azure OpenAI GPT 4 Turbo	Standard Configuration	Chat Completion		
Anthropic Claude 3 Haiku on Amazon	Standard Configuration	Chat Completion		
OpenAI GPT 3.5 Turbo	Standard Configuration	Chat Completion		
OpenAI GPT 3.5 Turbo 16k	Standard Configuration	Chat Completion		
OpenAI GPT 4	Standard Configuration	Chat Completion		
OpenAI GPT 4 Turbo	Standard Configuration	Chat Completion		
OpenAI GPT 4 32k	Standard Configuration	Chat Completion		

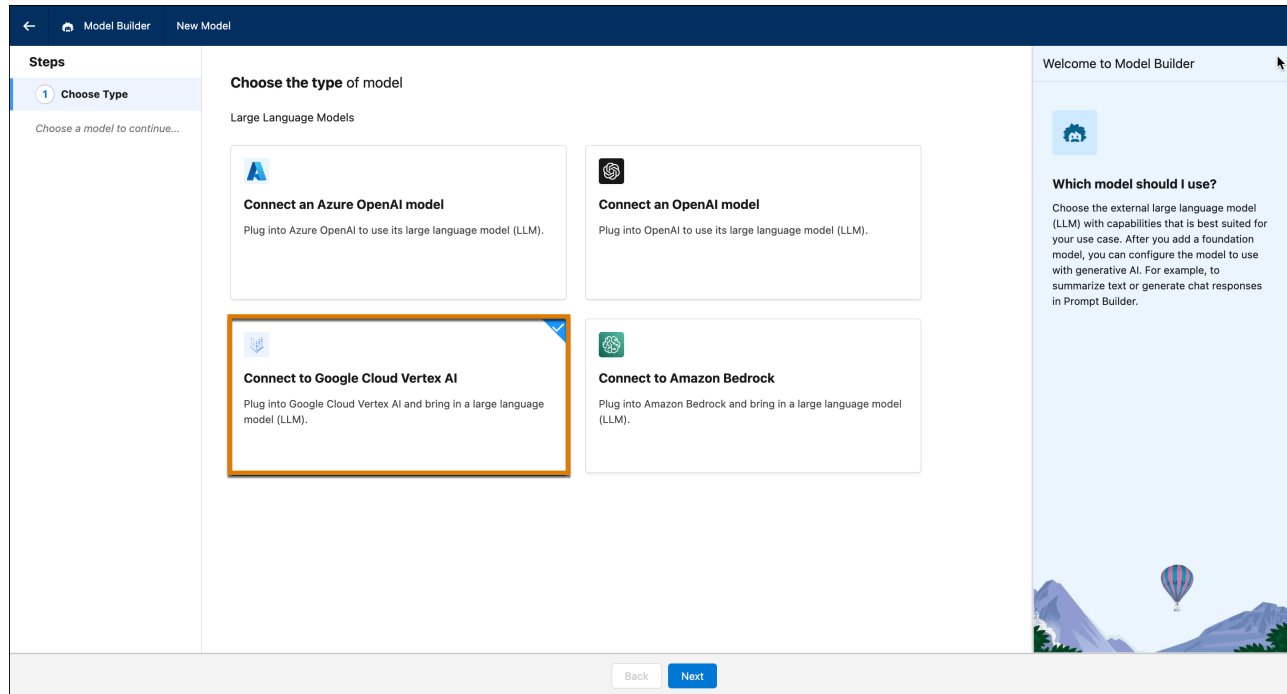
Power Your Generative AI with Google Gemini and Prompt Builder

Use the reliable, efficient, and highly intelligent Google Gemini model to drive your generative AI use cases. Leverage the power of your Salesforce data and use the insights to deliver innovative solutions for your customers. Bring your own large language model and use Google Cloud Vertex AI to establish a secure endpoint connection.

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 starting in July 2024.

How: To use Einstein generative AI models, turn on Einstein generative AI features in Setup.



Leverage Alerts to Evaluate the Quality of Your Predictive Model

Einstein Studio provides alerts to help you manage data discrepancies and issues that can occur during model training. Act on and resolve your alerts to build, retrain, and deploy models that can deliver more accurate predictions. You can review the alerts on the model details page, in model settings, and on the model activity tab.

Where: This change applies to Data Cloud in Developer, Enterprise, Performance, and Unlimited editions.

When: This functionality is available starting in July 2024.

SEE ALSO:

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

[Salesforce Help: Monitor Model Activity \(can be outdated or unavailable during release preview\)](#)

Let Einstein Autoselect the Best Factors for Your Use Case

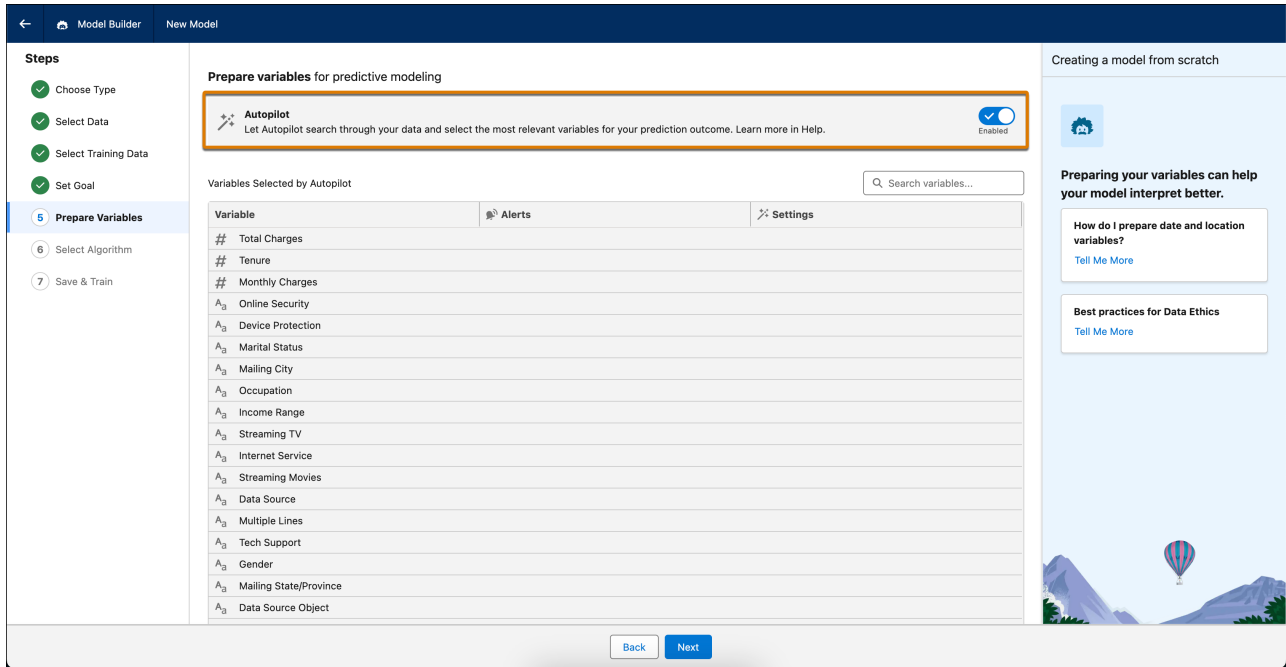
Einstein saves you time and intelligently selects the most relevant variables and recommended algorithm for a use case.

Where: This change applies to Data Cloud in Developer, Enterprise, Performance, and Unlimited editions.

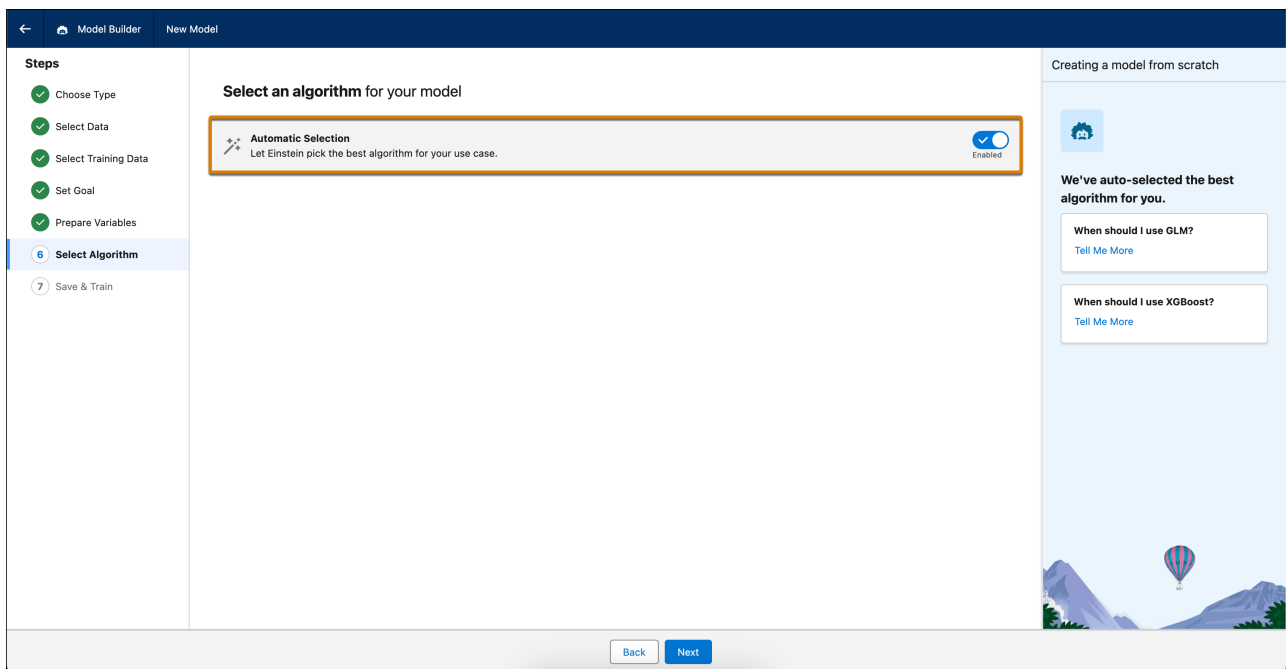
When: This functionality is available starting in July 2024.

How: In Model Builder, use these autoselection capabilities.

With Autopilot, Einstein selects variables with the highest impact on your predictive outcome.



With Automatic Selection, Einstein selects the best algorithm for your use case.



SEE ALSO:

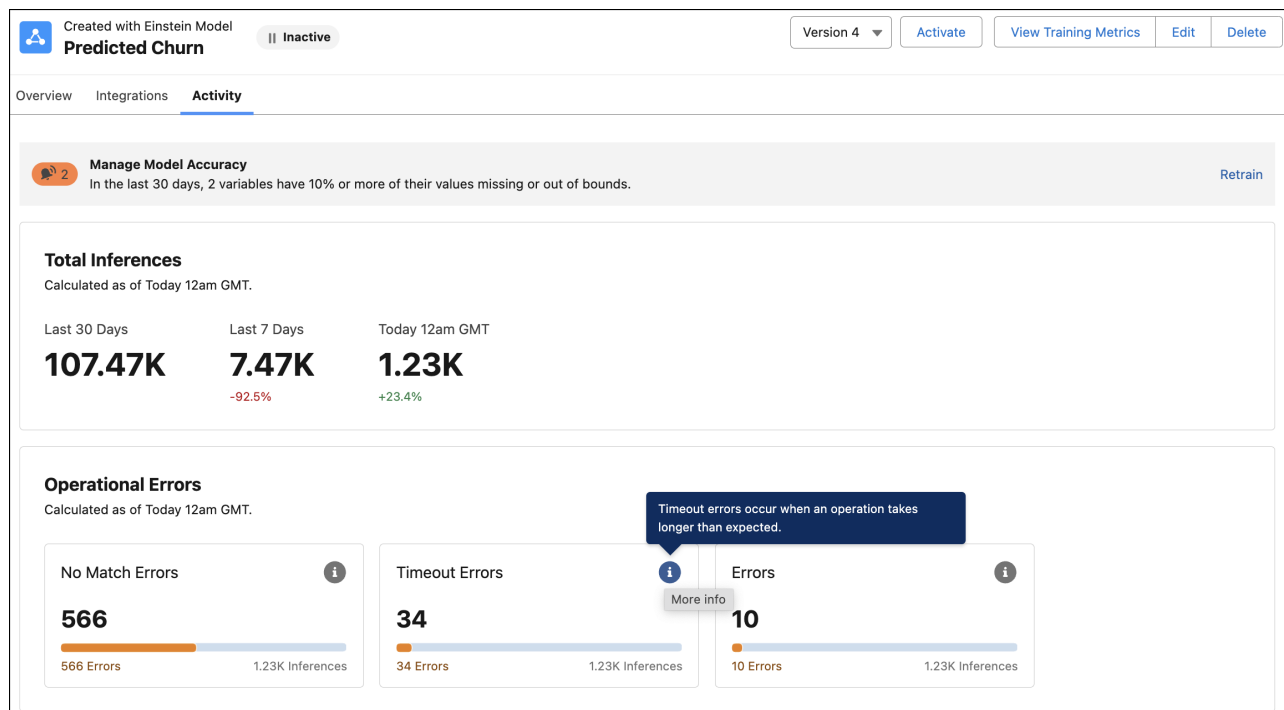
[Salesforce Help: Create a Model From Scratch \(can be outdated or unavailable during release preview\)](#)

Evaluate Your Model Performance with Activity Metrics

Use activity metrics to understand the performance of your predictive or generative model. View a summary of the total number of inferences over different time periods and gain insights into your connection, timeout, and authentication errors. In Model Builder, select the activated model, and go to the Activity tab to view its metrics.

Where: This change applies to Data Cloud in Developer, Enterprise, Performance, and Unlimited editions.

When: This functionality is available starting in July 2024.



SEE ALSO:

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

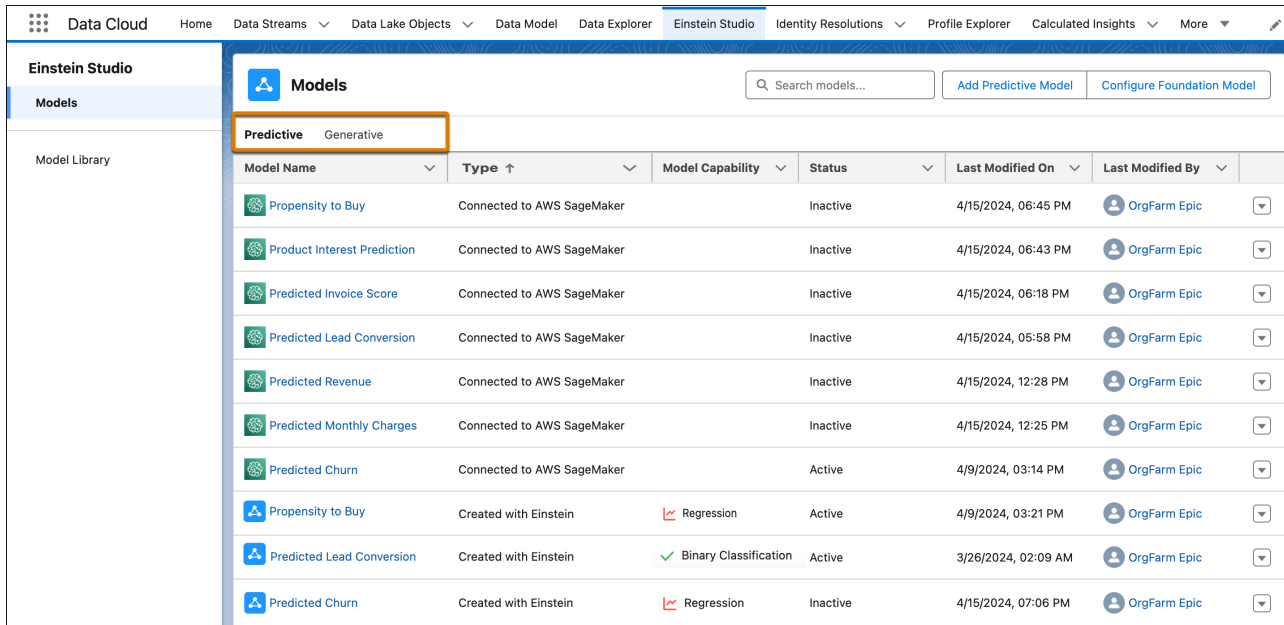
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You can now access models from a centralized location. Use the sidebar to locate models and open the model library. You can also view and manage predictive and generative models from their respective tabs.

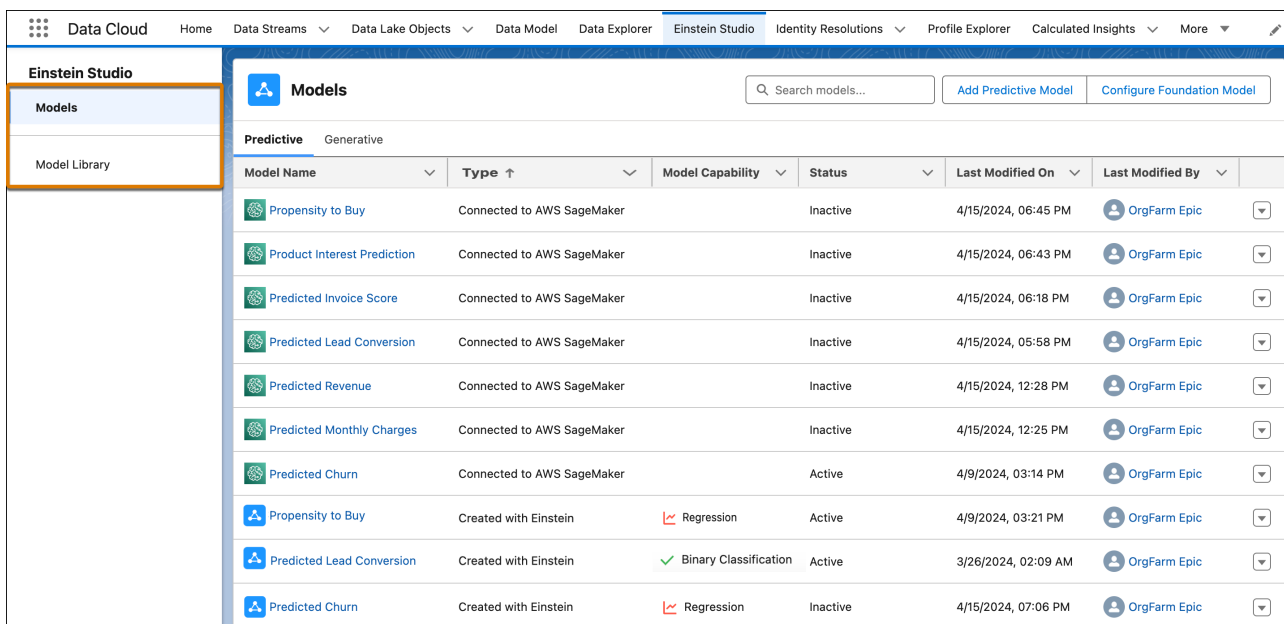
Where: This change applies to Data Cloud in Developer, Enterprise, Performance, and Unlimited editions. Einstein Generative AI is available in Lightning Experience.

When: This functionality is available starting in July 2024.

How: In Data Cloud, go to the Einstein Studio tab to view the updated experience and model tabs.



Model Name	Type	Model Capability	Status	Last Modified On	Last Modified By
Propensity to Buy	Connected to AWS SageMaker		Inactive	4/15/2024, 06:45 PM	OrgFarm Epic
Product Interest Prediction	Connected to AWS SageMaker		Inactive	4/15/2024, 06:43 PM	OrgFarm Epic
Predicted Invoice Score	Connected to AWS SageMaker		Inactive	4/15/2024, 06:18 PM	OrgFarm Epic
Predicted Lead Conversion	Connected to AWS SageMaker		Inactive	4/15/2024, 05:58 PM	OrgFarm Epic
Predicted Revenue	Connected to AWS SageMaker		Inactive	4/15/2024, 12:28 PM	OrgFarm Epic
Predicted Monthly Charges	Connected to AWS SageMaker		Inactive	4/15/2024, 12:25 PM	OrgFarm Epic
Predicted Churn	Connected to AWS SageMaker		Active	4/9/2024, 03:14 PM	OrgFarm Epic
Propensity to Buy	Created with Einstein	Regression	Active	4/9/2024, 03:21 PM	OrgFarm Epic
Predicted Lead Conversion	Created with Einstein	Binary Classification	Active	3/26/2024, 02:09 AM	OrgFarm Epic
Predicted Churn	Created with Einstein	Regression	Inactive	4/15/2024, 07:06 PM	OrgFarm Epic



Model Name	Type	Model Capability	Status	Last Modified On	Last Modified By
Propensity to Buy	Connected to AWS SageMaker		Inactive	4/15/2024, 06:45 PM	OrgFarm Epic
Product Interest Prediction	Connected to AWS SageMaker		Inactive	4/15/2024, 06:43 PM	OrgFarm Epic
Predicted Invoice Score	Connected to AWS SageMaker		Inactive	4/15/2024, 06:18 PM	OrgFarm Epic
Predicted Lead Conversion	Connected to AWS SageMaker		Inactive	4/15/2024, 05:58 PM	OrgFarm Epic
Predicted Revenue	Connected to AWS SageMaker		Inactive	4/15/2024, 12:28 PM	OrgFarm Epic
Predicted Monthly Charges	Connected to AWS SageMaker		Inactive	4/15/2024, 12:25 PM	OrgFarm Epic
Predicted Churn	Connected to AWS SageMaker		Active	4/9/2024, 03:14 PM	OrgFarm Epic
Propensity to Buy	Created with Einstein	Regression	Active	4/9/2024, 03:21 PM	OrgFarm Epic
Predicted Lead Conversion	Created with Einstein	Binary Classification	Active	3/26/2024, 02:09 AM	OrgFarm Epic
Predicted Churn	Created with Einstein	Regression	Inactive	4/15/2024, 07:06 PM	OrgFarm Epic

SEE ALSO:

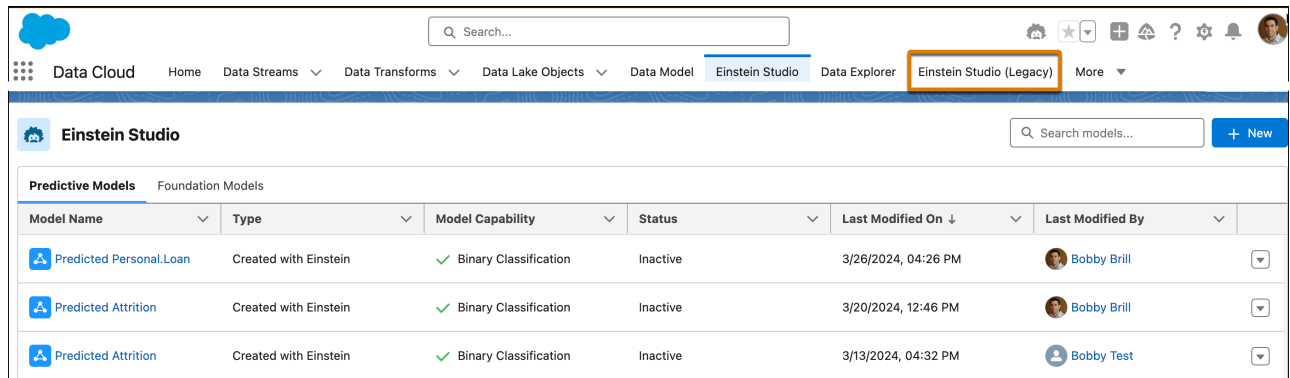
[Salesforce Help: Monitor Model Activity \(can be outdated or unavailable during release preview\)](#)

Einstein Studio Legacy Tab Is No Longer Available in Data Cloud

The new Einstein Studio tab in Data Cloud is now your home base for creating and connecting your AI models. Previously, you could also access model building capabilities on the Einstein Studio (Legacy) tab. We replaced this tab with one experience that provides access to more enhanced AI capabilities, such as predictive and generative AI models and activity metrics. You also get data, model, and training alerts.

Where: This change applies to Data Cloud in Developer, Enterprise, Performance, and Unlimited editions.

When: This functionality is available starting in July 2024.



SEE ALSO:

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

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

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The Data Cloud Einstein Lookalike Segments feature will no longer be available as of September 27, 2024. To prevent stale user information and data, delete your lookalike segments created by Einstein before the shutoff date.

Focus on Relevant Attributes When Creating Einstein Segments

Attributes are now grouped into suggested and additional sections so that you can zero in on the attributes that are most relevant to your description. The suggested attributes appear at the top. The additional attributes listed aren't directly relevant to your description. You can select attributes from both sections.

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 begins rolling out in September 2024.

How: In Data Cloud, create a segment and then select **Create with Einstein**. In the Einstein panel, enter a description of your segment using simple text. View all the attributes sorted by relevance in the draft.

Get Optimized Segment Results with Einstein Data Prism

Einstein Data Prism works behind the scenes to enrich the Data Cloud schema with semantic descriptions. Data Prism correlates the natural language phrases used in segment creation and your Data Cloud data, producing more accurate and relevant results. Einstein Data Prism is automatically enabled with Einstein Segment Creation.

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 begins rolling out in September 2024.

Create and Customize Retrievers in Einstein Studio

Einstein Studio now allows you to manage custom retrievers so that you can augment prompts with search results that ground large language models (LLMs) and their responses in proprietary data. When added to a prompt template, at run time, a retriever gets relevant facts from text indexed in a vector database, and augments the prompt with the retrieved information before submitting to the LLM. Every retriever is linked to a search index that is created in Data Cloud. Custom retrievers refine the search criteria and get the most relevant information to augment the prompt.

Where: This change applies to Data Cloud in Developer, Enterprise, Performance, and Unlimited editions. Einstein generative AI is available in Lightning Experience.

How: In Einstein Studio, navigate to the Retrievers tab. From here, you can create a custom retriever and follow the prompts to configure the retriever.

When: Retriever support in Einstein Studio is available starting the week of August 19, 2024.

SEE ALSO:

[Salesforce Help: Manage Retrievers](#)

Edit a Data Graph

Add related objects and fields to an existing data graph. Save it as a draft and make more changes before building the updated data graph. You can also include data graph metadata in a data kit and copy it to another org instead of manually recreating the metadata. And now you can access data from a data graph through an invocable action in a flow.

Where: This change applies to Data Cloud in Developer, Enterprise, Performance, and Unlimited editions.

When: These features become available in July 2024.

Access Data from Amazon Redshift and Databricks with BYOL Data Federation

Use Bring Your Own Lake (BYOL) data federation to securely view and consume data from Amazon Redshift and Databricks 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 external information, you can build rich, accurate profiles to establish a single source of truth and eliminate expensive integration processes.

When: This feature is being rolled out in June 2024.

Where: This change applies to Data Cloud in Enterprise, Performance, and Unlimited editions.


SEE ALSO:

[Salesforce Help: BYOL Data Federation](#)

Ingest More Data into Data Cloud with New Third-Party Connectors (Beta)

Import data from a growing list of external databases and applications into Data Cloud for harmonization. You can now ingest data from Adobe Analytics, Apache Hive, Asana, Azure Cosmos DB, eBay Analytics, Google Contacts, Google Drive, Google Spanner, GraphQL, IBM Cloud Object Storage, IBM Informix, Microsoft Dynamics 365, Oracle Eloqua, PayPal, SendGrid, Snapchat Ads, Spark SQL, and SugarCRM.

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 July 2024.

How: In Data Cloud Setup, under 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](#)

[Salesforce Help: Data Cloud: Connectors and Integrations](#)

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 by using secondary lookup keys. Use Query API V1 to query data graphs.

Where: This change applies to Data Cloud in Developer, Enterprise, Performance, and Unlimited editions.

When: As of January 2024, this feature is available for new and existing Data Cloud orgs.

SEE ALSO:

[Data Cloud Reference Guide: Query Data Graph Data](#)

Get Faster Segment Counts with Approximate Segment Population

When building a segment, get a quick estimate of the population count to validate your segment rules. Use the new Approximate Segment Population field to confirm that the segment count meets your expectations. You can then adjust your segment rules and save your segment to get the final segment population.

Where: This change applies to Data Cloud in Developer, Enterprise, Performance, and Unlimited editions.

When: This feature is available starting in July 2024.

SEE ALSO:

[Salesforce Help: Approximate Segment Population](#)

[Salesforce Help: Segment Your Data with Attributes](#)

Prioritize Campaigns with Waterfall Segments (Generally Available)

When running a campaign with multiple offers, use a waterfall segment to create a hierarchical structure and prioritize your campaigns. For example, you have four different discounted offers, but you don't want a customer to receive more than one offer. To target your campaign, create a prioritized list of mutually exclusive segments so that an audience member exists in only one subsegment of your waterfall and receives only one promotional offer. You can also rearrange subsegments in your waterfall to adjust the priority. This feature, now generally available, includes some changes since the last release.

Where: This change applies to Data Cloud in Developer, Enterprise, Performance, and Unlimited editions.

When: The Waterfall Segments feature is available starting in June 2024.

How: From Segments, create a waterfall segment, drag in segments to define the priority, and save your waterfall segment. Then activate the individual subsegments to target specific customers.

Create Segments with Fewer Clicks

Create segments faster using the provided default values for the data space, segment on, schedule, segment type fields, and aggregation operator. If there's only one possible value, Data Cloud sets it for you. For fields with multiple values, the most common choice is the default.

Where: This change applies to Data Cloud in Developer, Enterprise, Performance, and Unlimited editions.

When: This functionality is available starting in July 2024.

Rapidly Publish Segments to Hyperscaler Targets

In addition to the Marketing Cloud activation target, you can now use rapid segment publish for activations to all hyperscaler targets, such as Amazon S3, SFTP, Google Cloud Storage, and Microsoft Azure Storage.

Where: This change applies to Data Cloud in Developer, Enterprise, Performance, and Unlimited editions.

When: This functionality is available starting in July 2024.

SEE ALSO:


[Salesforce Help: Create a Standard Segment](#)

[Salesforce Help: Increase Segment Refresh from Data Cloud to the Activation Targets](#)

Define Segment Filters Based on Aggregate Values Across Multiple Levels (Pilot)

Get a more comprehensive view of your data with hierarchical aggregation, which rolls up revenues for accounts and their subsidiaries. Use the aggregated values to create more precise and meaningful segment filters.

Where: This change applies to Data Cloud in Developer, Enterprise, Performance, and Unlimited editions.

 **Note:** Hierarchical Aggregation is a pilot service that is subject to the Beta Services Terms at Agreements - Salesforce.com or a written Unified Pilot Agreement if executed by Customer, and applicable terms in the Product Terms Directory. Use of this pilot service is at the Customer's sole discretion.


When: This feature is available starting in August 2024.

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

Optimize Campaigns by Ranking and Limiting the Segment Audience (Pilot)

Efficiently manage fixed-size campaigns by reusing segmented audiences. Rank segment members based on preferred attributes and insights to select the most promising leads for a campaign.

Where: This change applies to Data Cloud in Developer, Enterprise, Performance, and Unlimited editions.

 **Note:** This feature is a pilot service that is subject to the Beta Services Terms at Agreements - Salesforce.com or a written Unified Pilot Agreement if executed by Customer, and applicable terms in the Product Terms Directory. Use of this pilot service is at the Customer's sole discretion.

When: This feature is available starting in August 2024.

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

SEE ALSO:

[Salesforce Help: Create a Marketing Cloud Engagement Activation for a Segment](#)


[Salesforce Help: Create a Data Cloud Activation for a Segment](#)

[Salesforce Help: Create an Activation for File Storage Target](#)

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:** Communication Capping is a pilot service that is subject to the Beta Services Terms at Agreements - Salesforce.com or a written Unified Pilot Agreement if executed by Customer, and applicable terms in the Product Terms Directory. Use of this pilot service is at the Customer's sole discretion.

When: This functionality is available starting in August 2024.

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

Use Segments in a Data Kit

You can now add a segment to a data kit or create a segment through a data kit. Instead of creating a segment from scratch, use a predefined segment from a data kit. You can also edit and fine-tune the segment.

Where: This change applies to Data Cloud in Developer, Enterprise, Performance, and Unlimited editions.

When: This functionality is available starting in August 2024.

SEE ALSO:

[Salesforce Help: Data Kits](#)

[Salesforce Help: Segmentation](#)

Apply Filters to Contact Points and the Activation Membership (Generally Available)

Pinpoint the target audience for specific campaign goals by using activation membership filters to have more control on your target audience. 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.

When: This functionality is available starting in June 2024.

SEE ALSO:

[Salesforce Help: Add Filters to the Activation Membership](#)

[Salesforce Help: Add Filters to Contact Points in Activation](#)

[Salesforce Help: Contact Points and Source Priority Order](#)

Use More Objects for Copy Field Enrichments

You can now create and manage copy field enrichments for contacts, leads, accounts, and assets. Previously, you could only manage copy field enrichments for Contact and Lead objects in Object Manager. Calculated insight objects (CIO) must have a single, Individual ID as the dimension, but you can't use multidimensional objects. For example, you can't add a field for Lifetime Value that's copied from a calculated insight object.

Where: This change applies to Data Cloud in Developer, Enterprise, Performance, and Unlimited editions.

When: This feature is available starting in August 2024.

How: From Setup, select **Integrations, Enrichments**, and then **Copy Fields**.

Data Cloud Related List Enrichments Now Support Accounts

Data Cloud Related List Enrichments now offer support for Account objects.

Where: This change applies to Data Cloud in Developer, Enterprise, Performance, and Unlimited editions.

How: From the Account object management settings, select Data Cloud Related Lists, and then create a new related list.

When: This change rolls out in June 2024.

Enrich Most Objects in Your Org With Data Cloud Data

You can now copy Data Cloud data into more objects in your org from Setup. Previously, you could copy data into the Contact and Lead objects from Object Manager.

Where: This change applies to Data Cloud in Developer, Enterprise, Performance, and Unlimited editions.

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

You can create and access copy field enrichments for more objects from Setup. You can still create copy field enrichments for the Contact and Lead objects in Object Manager, but not for other objects.

When: This change rolls out in May 2024.

Enrich Data Actions Using Data Graphs

Add more details or context to a primary engagement object by pulling in the relevant data from a connected data graph. Then, send the entire payload as events to Marketing Cloud, core platform, and webhook destinations.

Where: This change applies to Data Cloud in Enterprise, Performance, and Unlimited editions.

When: This feature is available starting mid-May 2024.

Who: Data Cloud customers with a Data Cloud license.

Run Batch Data Transforms at Custom Time Intervals

Tailor data updates to your needs by scheduling a transform to run at daily and hourly intervals in your preferred time zone. Previously, scheduling was limited to hourly intervals in the scheduler's local time zone.

Where: This change applies to Data Cloud in Developer, Enterprise, Performance, and Unlimited editions.

When: This feature is available starting in June 2024.

How: From Recently Viewed, click  next to the batch data transform name, and select **Schedule**. Under Run Mode, click **Scheduled**. Select the frequency and time interval.

SEE ALSO:

[Salesforce Help: Schedule a Batch Data Transform](#)

Enhance Row Security in Batch Data Transforms

To ensure accuracy and data uniqueness, generate a UUID for each row in a table to maintain distinct values. As you combine data from various sources within a batch data transform, you can potentially duplicate or overwrite rows that contain similar ID values.

Where: This change applies to Data Cloud in Developer, Enterprise, Performance, and Unlimited editions.

When: This feature is available starting in June 2024.

How: In a transform node, select **Formula**, and then select **Custom Formula**. In the formula editor panel, from the list of additional functions, select **uuid**.

SEE ALSO:

[Salesforce Help: Additional Functions for Formulas](#)

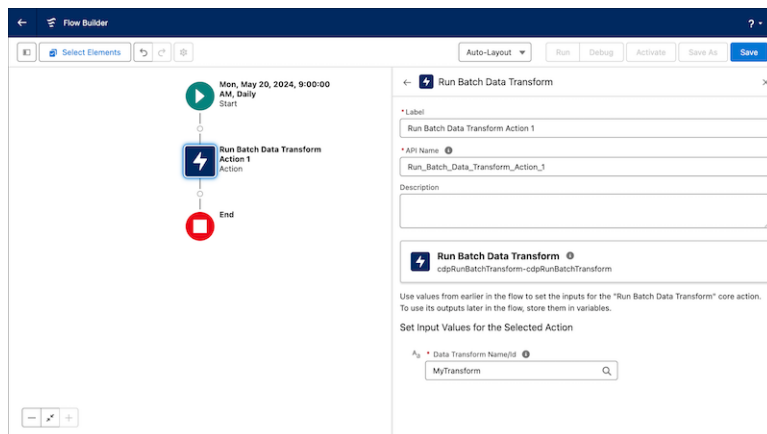
Run Batch Data Transforms with No Downtime

You can now run a sequence of batch data transforms one after the other without scheduling by using a flow. After a batch data transform completes, the next one starts immediately.

Where: This change applies to Data Cloud in Developer, Enterprise, Performance, and Unlimited editions.

When: This feature is available starting in June 2024.

How: To run batch data transforms consecutively, use the Run Batch Data Transform action in a flow.



SEE ALSO:

[Salesforce Help: Flow Core Action: Run a Batch Data Transform in Data Cloud \(can be outdated or unavailable during release preview\)](#)

Refresh Data More Frequently with Incremental Refresh in BYOL Data Federation

Access only new or updated data from a third-party partner, reducing latency and cost. You no longer need to perform a full refresh to update your data. With incremental refresh, you can update your data every 15 mins to 7 days as opposed to every 4 hrs to 7 days.

When: This feature is being rolled out in August 2024.

Where: This change applies to Data Cloud in Enterprise, Performance, and Unlimited editions.

SEE ALSO:

[Salesforce Help: BYOL Data Federation](#)

[Salesforce Help: Acceleration in Data Federation](#)

Edit an Output Node in a Batch Data Transform

Add a column to a data model object (DMO) output node without leaving the editor. Previously, to change a DMO, you needed to leave the batch data transform and go to the Data Model Objects tab to add a column.

Where: This change applies to Data Cloud in Developer, Enterprise, Performance, and Unlimited editions.

When: This feature is available starting in June 2024.

How: In a batch data transform, click an output node. From the list of available columns, click **Create New**.

Modify Streaming Data Transforms

You can now change a streaming data transform's name and SQL expression. Changes affect the incoming data as soon as you save.

Where: This change applies to Data Cloud in Developer, Enterprise, Performance, and Unlimited editions.

When: This feature is available starting in June 2024.

How: From Recently Viewed, click next to the data transform name, select **Edit**, and make your changes.

Refresh a Streaming Data Transform

When you update a streaming data transform, you can now apply the changes to all your data—current and incoming—by rebuilding the target data lake object.

Where: This change applies to Data Cloud in Developer, Enterprise, Performance, and Unlimited editions.

When: This feature is available starting in June 2024.

How: From Recently Viewed, click next to the data transform, and select **Rebuild**.

Improve Data Quality by Monitoring Problem Record Metrics

Records that aren't ingested into Data Cloud due to data quality issues are now logged in a problem records data lake object (DLO). A problem records DLO is generated each time a data stream is created and is deleted if the data stream is deleted. You can also query and map the problem records DLO just like any other DLO to identify and address data quality issues.

When: This feature is being rolled out in August 2024.

How: You can access the problem records information in any of the following ways:

- Use the **Refresh History** tab on data stream record home to view a new metric Problem Records, which count the number of records that were impacted for each job run.
- On the data stream record home, you can retrieve the name of the problem records DLO under properties and proceed to query it via:
 - Query Editor
 - Data Explorer
 - Query API

SEE ALSO:

[Salesforce Help: Monitoring Data Stream Problem Records](#)

Bring Inventory Data into Data Cloud with the Omnichannel Inventory Connector

Omnichannel Inventory tracks inventory availability across locations and selling channels, making stock management and customer order fulfillment a breeze. Use the Omnichannel Inventory Connector to ingest your inventory data into Data Cloud and unlock valuable inventory insights and predictions.

 **Note:** Translated user interface labels in localized versions of the Omnichannel Inventory Connector are currently in Beta release status.

Where: This change applies to Data Cloud and Omnichannel Inventory in Developer, Enterprise, and Unlimited editions.

When: This feature is available starting in June 2024.

Who: To connect to Omnichannel Inventory, use the Data Cloud Admin or Commerce Intelligence Admin permission set.

How: From Data Cloud Setup, in the Quick Find box, enter *Omnichannel Inventory Connector*, and then select **Omnichannel Inventory Connector**.

SEE ALSO:

[Salesforce Help: Set Up an Omnichannel Inventory Connection \(can be outdated or unavailable during release preview\)](#)

Customize Web Pages in Real Time

Wow your customers by processing user engagement data in profile data in milliseconds to enable next-page personalization. With real-time identity resolution, real-time calculated insights, and real-time segmentation built on real-time data graphs, you can match profiles, generate metrics and segments, and return profile data while a customer is actively browsing.

Where: This change applies to Data Cloud in Developer, Enterprise, Performance, and Unlimited editions.

Who: This feature is available on a limited basis in Summer '24. Contact your Account Executive for more information.

When: These features become available in July 2024.

How: Ingest profile data from the Web SDK or Mobile SDK for real-time matching. Identity resolution runs as real-time when a real-time data graph is created from its output Unified Individual data model object. Real-time insights and real-time segments built on the data graph are triggered when records are updated. Use Data Cloud Connect REST API to return a data graph record in real time.

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](#)

Connect Unstructured Data in Data Cloud

Connect unstructured data in Data Cloud and create search index configurations to prepare that data for vector search. With unstructured data and vector search, you can create more customer-focused results in your searches and queries across Salesforce gen AI, automation, and analytics tools.

IN THIS SECTION:

[Enhance Your AI and Automation Strategies with Unstructured Data in Data Cloud](#)

Connect your unstructured data—such as chat transcripts, audio files, emails, or Salesforce Knowledge articles—to drive personalized, customer-centric results in your Einstein generative AI (Prompt Builder and Einstein Copilot), automation (Flow Builder), and analytics (Tableau) applications.

[Use Vector Search in Generative AI, Automation, and Analytics Tools](#)

With unstructured data and vector search, you can ground your generative AI, automation, and analytics tools with relevant, customer-specific data to deliver results that align with users' intent or contexts. To get started with vector search, you first build search index configurations from existing unstructured data.

Enhance Your AI and Automation Strategies with Unstructured Data in Data Cloud

Connect your unstructured data—such as chat transcripts, audio files, emails, or Salesforce Knowledge articles—to drive personalized, customer-centric results in your Einstein generative AI (Prompt Builder and Einstein Copilot), automation (Flow Builder), and analytics (Tableau) applications.

Using your unstructured data, you can enhance service reply recommendations by generating responses to customers using Knowledge Article data or create prompt templates that use prior emails to generate personalized messages. Or use Flow Builder and Einstein Copilot

to show service agents similar case data to help in case resolution or when they log new cases. You can connect unstructured data from Amazon S3, Google Cloud Platform, Microsoft Azure Blob Storage, or any existing connector in Data Cloud.

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

When: This feature is available starting in June 2024.

How: In Data Cloud, create an unstructured data lake object. Map the UDLO to an unstructured data model object. You can also ingest unstructured data through any existing connector into a data lake object (DLO).

SEE ALSO:

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

[Salesforce Help: Connect Unstructured Data in Data Cloud \(can be outdated or unavailable during release preview\)](#)

Use Vector Search in Generative AI, Automation, and Analytics Tools

With unstructured data and vector search, you can ground your generative AI, automation, and analytics tools with relevant, customer-specific data to deliver results that align with users' intent or contexts. To get started with vector search, you first build search index configurations from existing unstructured data.

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

When: This feature is available starting in June 2024.

How: Search index configurations break unstructured data into chunks to prepare it for vector search. Vector embeddings are then generated from those chunks. The vectorized content, stored in the Data Cloud search index, is searchable from and can be used in Einstein gen AI applications (Prompt Builder and Einstein Copilot), as well as automation (Flow Builder) and analytics (Tableau) applications. From Data Cloud, go to the Search Index page and create a search index configuration using either Easy Setup or Advanced Setup.

SEE ALSO:

[Salesforce Help: Use Search to Ground AI \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Create Search Index Configurations in Data Cloud \(can be outdated or unavailable during release preview\)](#)

Import data from the Adobe Marketo Engage connector to Data Cloud

Use the Adobe Marketo Engage Connector to import campaigns, leads, and lead activities data from Adobe Marketo.

Where: Where: This change applies to Data Cloud in Developer, Enterprise, Performance, and Unlimited editions.

When: This feature is generally available in June 2024.

Experience Faster Salesforce CRM Connector Refreshes

With the support of stream processing, data stream deployment and change events are optimized to process data with minimal latency. Stream processing is available for standard objects, such as Account, Contact, Lead, and Opportunity, and all custom objects.

Where: This change applies to Data Cloud in Developer, Enterprise, Performance, and Unlimited editions.

When: This functionality is available starting in June 2024.

SEE ALSO:

[Salesforce Help: Data Stream Schedule in Data Cloud](#)

Identify Your Salesforce CRM Orgs Using an Alias

Assign an alias to your Salesforce CRM connections so that you can easily identify, search, and filter for your orgs.

Where: This change applies to Data Cloud in Developer, Enterprise, Performance, and Unlimited editions.

When: This functionality is available starting in June 2024.

How: On the Connect an Org page, enter an alias for your connection.

SEE ALSO:

[Salesforce Help: Use an Alias for a Salesforce CRM Connection](#)

Use Identity Provider Authentication for S3 Connectors

Get a more secure and streamlined connection experience with identity provider (IdP) authentication when ingesting data from an S3 bucket. Manage credentials more easily with enhanced security protocols.

When: This feature is being rolled out in July 2024.

Where: This change applies to Data Cloud in Enterprise, Performance, and Unlimited editions.

How: Choose IDP-based authentication when setting up a new S3 Connector.

SEE ALSO:

[Salesforce Help: Set Up Amazon S3 Connection](#)

Deploy Data Kit Components with Autolaunched Flows

Deploy all data kits components together to a target org using REST API. The API triggers the **Deploy Data Kit Components** flow to deploy each component sequentially. Before moving to the next component, the flow waits for the deployment status of the previous component. Previously, you deployed each data kit component by going to their individual tabs.

Where: This change applies to Data Cloud for Developer, Enterprise, Performance, and Unlimited editions.

When: This feature is available starting in August 2024.


How: Use the `curl`

`https://services/data/v61.0/actions/custom/flow/sfdatakit__DeployDataKitComponents` API.

Work with Data Cloud in a Sandbox Org (Beta)

You can now test and explore Data Cloud features in a sandbox org. The sandbox is a copy of your production org that you can use for testing, training, or creating customizations. When you create a sandbox, all your production org Data Cloud metadata and configurations are replicated in the sandbox.

Where: This change applies to Data Cloud in Enterprise, Performance, and Unlimited editions. The production org must have a Data Cloud license.

 **Note:** Data Cloud in Sandbox is a pilot or beta service that is subject to the Beta Services Terms at [Agreements - Salesforce.com](#) or a written Unified Pilot Agreement if executed by Customer, and applicable terms in the [Product Terms Directory](#). Use of this pilot or beta service is at the Customer's sole discretion. You can provide feedback and suggestions for the feature in the [Trailblazer Community](#).

When: This functionality is available in July 2024.

How: In your production org, go to Feature Manager and opt in to Data Cloud in Sandbox. Create a sandbox using the UI or CLI. In the new sandbox, turn on Data Cloud in Data Cloud Setup.

 [Watch a video](#)

SEE ALSO:

[Salesforce Help: Create a Data Cloud Sandbox \(Beta\)](#)

[Salesforce Help: Sandboxes: Staging Environments for Customizing and Testing](#)


[Data Cloud Developer Guide: App Development Lifecycle](#)

[Salesforce DX Developer Guide: Sandboxes](#)

Deploy Data Cloud Changes from a Sandbox to Production (Beta)

You can now deploy changes back to your production org by adding the modified Data Cloud components to a data kit and then adding that data kit to a change set. You then follow the standard process to upload and deploy the change set in your production org. In the production org, you can deploy the data kit components with a single click.

Where: This change applies to Data Cloud in Enterprise, Performance, and Unlimited editions.

 **Note:** Data Cloud in Sandbox is a pilot or beta service that is subject to the Beta Services Terms at [Agreements - Salesforce.com](#) or a written Unified Pilot Agreement if executed by Customer, and applicable terms in the [Product Terms Directory](#). Use of this pilot or beta service is at the Customer's sole discretion. You can provide feedback and suggestions for the feature in the [Trailblazer Community](#).

When: This functionality is available in August 2024.

SEE ALSO:


[Salesforce Help: Deploy Data Cloud Changes from a Sandbox \(Beta\)](#)

[Salesforce Help: Change Sets](#)

Improve Search Accuracy with Hybrid Search (Beta)

Combine semantically aware vector search with the ability of keyword search to handle domain vocabulary and provide users the most relevant results. Hybrid search merges the retrieved information from both searches and then ranks the results to show the most relevant information. You can also influence the search results by configuring ranking factors, such as record recency or popularity.

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

 **Note:** Hybrid Search in Data Cloud is a beta service that is subject to the Beta Services Terms at [Agreements - Salesforce.com](#) or a written Unified Pilot Agreement if executed by Customer, and applicable terms in the [Product Terms Directory](#). Use of this beta service is at the Customer's sole discretion but once enabled in beta, cannot be disabled. Customers may choose to utilize vector search instead, if preferred. Enabling Hybrid Search in Data Cloud impacts the consumption of credits used for billing.

How: In Feature Manager, enable hybrid search. From Data Cloud Setup, in the Quick Find box, enter Feature Manager, and then select Hybrid Search (Beta).

SEE ALSO:

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

Cross Cloud Updates for Data Cloud

Our latest round of cross-cloud features for Data Cloud.

New and Changed Features

- Data Cloud and Apex:
 - [Use SOQL in Apex with Data Cloud Objects](#)
 - [Consider Field- and Record-Level Access When Using Apex With Data Cloud Objects](#)
 - [Mock SOQL Tests for Data Cloud Objects](#)
- Data Cloud with Commerce: [Commerce Intelligence](#)
- Data Cloud and Einstein Search: [Improve Search with Insights from Search Analytics \(Pilot\)](#)
- Data Cloud and Einstein Personalization: [Provide Personalized Experiences With Einstein Personalization](#)
- Data Cloud and Industries:
 - Data Cloud and Automotive Cloud: [Data Cloud for Automotive Experiences](#)
 - Data Cloud and Consumer Goods: [Consolidate Your Customer Data with Data Cloud for Consumer Goods](#)
 - Data Cloud and Data Processing Engine: [Data Processing Engine](#)
 - Data Cloud and Financial Services Cloud: [Data Cloud for Financial Services Cloud](#)
 - Data Cloud and List Builder: [List Builder for Data Cloud Segment](#)
 - Data Cloud and Loyalty Management: [Control Who Can Create Promotions with Ease](#)
 - Data Cloud and Manufacturing Cloud: [Data Cloud Features for Manufacturing Cloud](#)
- Data Cloud and Marketing Cloud: [Other Changes in Marketing Cloud Growth](#)
- Data Cloud with Salesforce Flow: [Run Tests for Data Cloud-Triggered Flows](#)
- Data Cloud with Service Cloud:
 - [Service Intelligence](#)
 - [Field Service Intelligence](#)
- Data Cloud Enrichments: [Data Cloud Related List Enrichments Now Support Accounts](#)
- Data Cloud Enrichments: [Enrich Most Objects in Your Org With Data Cloud Data](#)
- Data Cloud Reports and Dashboards: [Data Cloud Reports and Dashboards](#)
- Data Cloud and Sandbox:
 - [Work with Data Cloud in a Sandbox Org \(Beta\)](#)
 - [Deploy Data Cloud Changes from a Sandbox to Production \(Beta\)](#)

Organize Segment Intelligence Data With Data Spaces

You can now choose an additional data space for Segment Intelligence, offering greater flexibility for segmenting your data. Previously, you could only use the default data space.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions with a Data Cloud Starter license.

When: This change is available starting in July 2024.

How: To set up Segment Intelligence for a data space, go to Setup and search for Segintel.

Optimize Monetary Data Management with the Currency Data Type

Use the currency data type to manage different currencies in your data. The data type supports multiple currencies and lets you manage both the currency of your corporate headquarters and additional currencies as needed. Multicurrency support, along with built-in currency conversion makes it easy to choose and operate in your preferred currency.

When: This feature is being rolled out in September 2024.

Where: This change applies to Data Cloud in Enterprise, Performance, and Unlimited editions.

IN THIS SECTION:

[Include a Currency Type in a Data Action](#)

If you have Multicurrency enabled, you can now select a currency type and apply it as part of the rule condition when creating a data action.

SEE ALSO:

[Salesforce Help: Data Types](#)

Include a Currency Type in a Data Action

If you have Multicurrency enabled, you can now select a currency type and apply it as part of the rule condition when creating a data action.


Where: This change applies to Data Cloud in Enterprise, Performance, and Unlimited editions.

When: This functionality is available starting in September 2024.

Transcribe and Index Audio and Video Files (Beta)

Simplify search and retrieval of audio and video data by transcribing and indexing content automatically in Data Cloud. You can then query transcriptions to retrieve relevant information or similar items based on the text. The supported audio formats are FLAC, MP3, and WAV. The supported video formats are AVI, MOV, and MP4. Transcriptions are created using the whisper-small model.

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

 **Note:** Transcription and indexing of audio and video files is subject to the Beta Services Terms at [Agreements - Salesforce.com](#) or a written Unified Pilot Agreement if executed by Customer, and applicable terms in the [Product Terms Directory](#). Use of this beta service is at the Customer's sole discretion.

When: This functionality is available starting in August 2024.

How: In Feature Manager enable Audio and Video File Transcription in Search Index. In the search index advanced setup, create a search index configuration for a UDMO based on audio and video files. Transcription processing occurs when you create the search index configuration.

Beta Limitations

Indexing audio and video transcriptions is not supported in search index configurations created from data kits.

SEE ALSO:

[Salesforce Help: Create Vector Search Index Configurations \(can be outdated or unavailable during release preview\)](#)

Add Context to Chunks with Prepend Fields

When you need to add additional fields or metadata to provide context for a chunk, use prepend fields. For example, the Description field in a knowledge article could exceed the optimal chunk size for prompt-based retrieval. By prepending the Title field to the chunk, you can provide more context in the prompt results. Add prepended fields on standard DMOs in the search index advanced setup.

Where: This change applies to Data Cloud in Developer, Enterprise, Performance, and Unlimited editions.

When: This functionality is available starting in August 2024.

SEE ALSO:

[Salesforce Help: Create Vector Search Index Configurations](#)

Supercharge Your AI Usage with Retrieval Augmented Generation (RAG)

Augment your prompts with Retrieval Augmented Generation (RAG) in Data Cloud. You can now augment prompt templates with unstructured content organized in the vector database in Data Cloud. Surface relevant information in your prompts from proprietary data, such as emails, meeting notes, service replies, article answers, and other types of unstructured content. By augmenting the prompt with accurate, current, and pertinent information, RAG improves the relevance and value of LLM responses for users.

Where: Enterprise, Performance, and Unlimited Editions with the Einstein for Sales, Einstein for Platform, or Einstein for Service add-on. Einstein generative AI is available in Lightning Experience.

When: RAG in Data Cloud is available starting the week of August 19, 2024.

SEE ALSO:

[Using Retrieval Augmented Generation](#)

Deployment

Check out what's new in change sets.

IN THIS SECTION:

[New and Changed Components for Change Sets](#)

The components available for a change set vary by edition.

New and Changed Components for Change Sets

The components available for a change set vary by edition.

EnablementProgramDefinition and EnablementMeasureDefinition

Retrieve Enablement programs and measures from a sandbox and deploy them to production.

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.

IN THIS SECTION:

[Lightning Components](#)

Salesforce is modifying internal implementations of components and styles to prepare for SLDS architecture updates. LWC API version 61.0 provides `ElementInternals` Web API support and several bug fixes. Support for third-party web components is still in beta, and open mode now gives you access to the `shadowRoot` object. You can also navigate to a URL-addressable component and use the Utility Bar API in LWC.

[Visualforce](#)

Check whether you're affected when all unmanaged Visualforce pages are served on the `force.com` domain. To check if the new default behavior of the `<apex:sectionHeader>` component affects your orgs, review the uses of markup in the component's `description` attribute.

[Apex](#)

Use new Apex cursors to break up the processing of a SOQL query result into pieces that can be processed within the bounds of a single transaction. Formula evaluation in Apex is now in beta. Use SOQL in Apex and mock SOQL tests for Data Cloud objects. Understand security considerations when using Apex with Data Cloud objects. Apex now supports SOQL relationship queries that traverse up to five levels of parent-child records. Track Apex scheduled job limits, edit jobs, and view enhanced job details on the All Scheduled Jobs page in Setup. Instance methods in a subclass don't override private methods with the same signature. Monitor limits and cumulative run time for setup methods using `ApexTestResult`. See enhanced error messages on deleting a class, improved logging when FOR UPDATE locks are released, and information on org, user, and My Domain names in Apex exception emails.

[API](#)

Update records using external IDs and interact with an improved OpenAPI spec `sObjects` REST API. The previously announced retirement of API versions 21.0 through 30.0 of the Salesforce Platform API is delayed until Summer '25.

[Packaging](#)

Packaging facilitates the development and distribution of business apps. Use second-generation managed packages to create apps to sell and distribute on AppExchange. Use unlocked packages to develop internal business apps.

[Development Environments](#)

Development environments are full-featured Salesforce environments that you use to develop and test existing or new features and custom applications. They include Developer Edition orgs, sandboxes, and scratch orgs.

[Platform Development Tools](#)

Build applications collaboratively and deliver continuously with Salesforce Developer Experience (DX), the open and integrated experience for custom app development on Salesforce.

[Heroku](#)

Use Heroku to build, deliver, monitor, and scale innovative apps fast. Build them using popular programming languages and frameworks without having to maintain the infrastructure.

[Salesforce Functions](#)

Salesforce Functions is retiring on January 31, 2025. Learn about the retirement plan for Salesforce Functions.

[AppExchange Partners](#)

Search for packages by name, ID, or version number in the AppExchange Partner Console. Alt text is required for carousel images in AppExchange listings.

[Change Data Capture](#)

Receive change events for more objects.

[Platform Events](#)

Add real-time Event Monitoring events to a custom channel. Learn about planned feature retirements for standard-volume platform events and some Streaming API versions.

[Event Bus](#)

Manage your Pub/Sub API event subscriptions. Use real-time event monitoring events with event relays.

[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

Salesforce is modifying internal implementations of components and styles to prepare for SLDS architecture updates. LWC API version 61.0 provides `ElementInternals` Web API support and several bug fixes. Support for third-party web components is still in beta, and open mode now gives you access to the `shadowRoot` object. You can also navigate to a URL-addressable component and use the Utility Bar API in LWC.



Note: Looking for [new and changed Lightning web components, Aura components, and Aura component interfaces](#)? See the lists of new and changed items at the end of the Development section.

IN THIS SECTION:

[Get the Latest LWC Changes with LWC API Version 61.0](#)

LWC API version 61.0 provides a new feature and several bug fixes. By versioning your custom Lightning web components, we can ship new features, bug fixes, and performance improvements. Versioning also helps us deprecate legacy features. 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.

[Use Third-Party Web Components in LWC \(Beta\)](#)

Open mode now gives you access to the `shadowRoot` object. Using third-party web components in LWC continues to be available in beta.

[Navigate to a URL-Addressable Lightning Web Component](#)

Make your component available via a URL using the `lightning__UrlAddressable` target. To create a URL addressable component, you no longer have to embed your Lightning web component in an Aura component.

[Control Utilities Within the Utility Bar](#)

To control a utility within a utility bar, use the Utility Bar API methods from a Lightning web component.

[Confirm Your Components Use Supported Design System Customizations](#)

Salesforce is modifying internal implementations of our own Lightning components, Salesforce Lightning Design System (SLDS) styles, and custom properties to support future UI changes. These internal changes won't cause visible UI changes for most customers. If you customize your components or sites using supported techniques, we expect these changes to have little to no impact on your customizations. However, if your components use unsupported customizations, we recommend that you update them to use supported techniques to prevent visual regressions.

[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.

[Class and Style Attributes Render with Extra Whitespaces](#)

More components render with extra whitespaces in the `class` and `style` attributes. In Spring '23, we announced an improved rendering time for your Lightning web components as a result of an optimization on how the framework handles static elements. That change influenced how the `class` and `style` attributes of your static nodes are rendered in the DOM. Extra whitespaces or unexpected characters sometimes appear in values for those attributes.

[Lightning Web Security Enablement Rollout Postponed](#)

Starting in Spring '22, Salesforce began enabling Lightning Web Security (LWS) in some customer orgs. To minimize disruption for customers with highly customized environments, we're postponing automatic enablement until further notice. If LWS isn't enabled yet in your org, we encourage you to enable it in a sandbox environment to test your components running in LWS.

[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. In addition, some distortions have changed and one was removed.

SEE ALSO:

[Lightning Web Components Developer Guide](#)

[Lightning Aura Components Developer Guide](#)

Get the Latest LWC Changes with LWC API Version 61.0

LWC API version 61.0 provides a new feature and several bug fixes. By versioning your custom Lightning web components, we can ship new features, bug fixes, and performance improvements. Versioning also helps us deprecate legacy features. 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.


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 new features, bug fixes, and enhancements that are 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.

 **Important:** 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 repeat until you get to the latest API version.

LWC API version 61.0 corresponds to v6.0.0 in LWC open source (OSS). LWC developers who use LWC outside of the Salesforce platform are impacted by additional breaking changes. See [LWC OSS v6.0.0](#).

IN THIS SECTION:

[Update Your Light DOM Components for Improved Slot Forwarding](#)

In LWC API version 61.0 and later, you have to configure the `slot` attribute for light DOM `<slot>` elements that forward content into a shadow DOM `<slot>`. Also, when you pass a component into a light DOM `<slot>`, LWC removes the component's `slot` attribute so it doesn't render in the DOM. These changes impact Jest snapshots, so we recommend you review and update your tests. Earlier versions of LWC required you to create an HTML wrapper instead of the `slot` attribute for slot forwarding.

SEE ALSO:

[Lightning Web Components Developer Guide: API Versioning \(can be outdated or unavailable during release preview\)](#)

Update Your Light DOM Components for Improved Slot Forwarding

In LWC API version 61.0 and later, you have to configure the `slot` attribute for light DOM `<slot>` elements that forward content into a shadow DOM `<slot>`. Also, when you pass a component into a light DOM `<slot>`, LWC removes the component's `slot` attribute so it doesn't render in the DOM. These changes impact Jest snapshots, so we recommend you review and update your tests. Earlier versions of LWC required you to create an HTML wrapper instead of the `slot` attribute for slot forwarding.

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: For example, if you want the light DOM `namedSlot` slot to pass this `` element into the `forwardedSlot` slot, `namedSlot` has to have the property `slot="forwardedSlot"`.

```
<!-- container.html -->
<template>
  <c-outer>
    <span slot="namedSlot">Named slot content</span>    // Content to pass from namedSlot
    into forwardedSlot
  </c-outer>
</template>
```

```
<!-- outer.html -->
<template lwc:render-mode="light">
  <c-inner>
    <slot name="namedSlot" slot="forwardedSlot"></slot>    // The namedSlot slot
  </c-inner>
</template>
```

```
<!-- inner.html -->
<template>
  <slot name="forwardedSlot"></slot>    // The forwardedSlot slot
</template>
```

In the latest version of LWC, native and synthetic shadow slots still preserve the `slot` attribute. So, the `inner` component renders in the DOM with `slot="namedSlot"`.

```
<c-outer>
  <c-inner>
    <span slot="namedSlot">Named slot content</span>
  </c-inner>
</c-outer>
```

However, if you pass a component into a named light DOM slot, LWC removes the `slot` attribute from the slotted content. In this example, the `template` passes the `div` element into the named slot.

```
<template>
  <c-light-child>
    <div slot='lightSlot'>Slotted content</div>
  </c-light-child>
</template>
```

```
<!-- c-light-child -->
<template render:mode="light">
  <slot name="lightSlot"></slot>
</template>
```

`c-light-child` renders in the `template` without the `slot` attribute.

```
<c-light-child>
  <div>Slotted content</div>
</c-light-child>
```

If your CSS selectors or `querySelector()` methods reference the `slot` attribute, choose a different CSS selector or use `lwc:ref` instead.

```
<!-- Don't rely on CSS selectors like this -->
const foo = this.querySelector('[slot="foo"]');

<!-- Instead, use lwc:ref -->
<c-child>
  <div slot="foo" lwc:ref="foo">hello</div>
</c-child>
```

SEE ALSO:


[Lightning Web Components Developer Guide: slot Attribute for Light DOM Elements \(can be outdated or unavailable during release preview\)](#)

[Lightning Web Components Developer Guide: API Versioning](#)

Use Third-Party Web Components in LWC (Beta)

Open mode now gives you access to the `shadowRoot` object. Using third-party web components in LWC continues to be available in beta.

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](#).

How: Many third-party web components require an open shadow root, so they can call `appendChild`, `adoptedStyleSheets`, and other web APIs. For example, they can append HTML tags like `<div>` and `<style>` or share a stylesheet with a shadow root.

To create a shadow root, a custom element uses the [attachShadow\(\)](#) web API method in the constructor.

Previously, Lightning Web Security changed open mode to closed mode automatically. In closed mode, JavaScript access to the shadow DOM tree is blocked, and `shadowRoot` returns null.

SEE ALSO:

[MDN web docs: Using custom elements](#)

[Lightning Web Components Developer Guide: Use Third-Party Web Components in LWC \(Beta\) \(can be outdated or unavailable during release preview\)](#)

Navigate to a URL-Addressable Lightning Web Component

Make your component available via a URL using the `lightning__UrlAddressable` target. To create a URL addressable component, you no longer have to embed your Lightning web component in an Aura component.

Where: This change applies to custom Lightning web components in Lightning Experience and all versions of the Salesforce mobile app. This change also applies to Lightning console apps in Enterprise, Performance, Unlimited, and Developer editions. This change isn't available in Experience Builder sites because it interferes with custom domain and CDN support.

How: To generate a URL for your Lightning web component and make it available via a URL, include the `lightning__UrlAddressable` target in your component's `.js-meta.xml` configuration file. Set the `<isExposed>` tag to `true`. The `<apiVersion>` tag has no impact on this feature and can be set to an earlier or later version.

```

<!-- myComponent.js-meta.xml -->
<?xml version="1.0" encoding="UTF-8" ?>
<LightningComponentBundle xmlns="http://soap.sforce.com/2006/04/metadata">
  <apiVersion>59.0</apiVersion>
  <isExposed>true</isExposed>
  <targets>
    <target>lightning__UrlAddressable</target>
  </targets>
</LightningComponentBundle>

```

To navigate to the custom component, use the `lightning/navigation` module with the `standard__component` page reference type.

```

// navToComponentWithState.js
import { LightningElement } from 'lwc';
import { NavigationMixin } from 'lightning/navigation';

export default class NavToComponentWithState extends NavigationMixin(LightningElement) {
  navigateToComponent() {
    this[NavigationMixin.Navigate]({
      // Pass in pageReference
      type: 'standard__component',
      attributes: {
        componentName: 'c__myComponent',
      },
      state: {
        c__propertyValue: '2000',
      },
    });
  }
}

```

The `standard__component` page reference type has this attribute.

- `componentName`—The Lightning web component name in the format `namespace__componentName`.

You can pass any key and value in the `state` object. The key must include a namespace, and the value must be a string. If you don't have a registered namespace, add the default `c__` namespace.

In your URL addressable component, `myComponent`, use a getter to return the property value from the `state` object.

```
// myComponent.js
import { LightningElement, wire, api } from 'lwc';
import { CurrentPageReference } from 'lightning/navigation';

export default class MyComponent extends LightningElement {
  @wire(CurrentPageReference)
  currentPageRef;

  @api propertyValue;

  get propertyValue() {
    return this.currentPageRef.state.c__propertyValue;
  }
}
```

A component with the `lightning__UrlAddressable` target has a URL with the format `/lightning/cmp/c__MyComponent?c__mystate=value`.

SEE ALSO:

[Salesforce Console Developer Guide: Using Page References to Open Console Workspace Tabs and Subtabs](#)

[Lightning Web Components Developer Guide: Navigate to a URL Addressable Component \(can be outdated or unavailable during release preview\)](#)

Control Utilities Within the Utility Bar

To control a utility within a utility bar, use the Utility Bar API methods from a Lightning web component.

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

How: To access the LWC Utility Bar API methods and wire adapter, import the `lightning/platformUtilityBarApi` module. This module is supported for use with Lightning Locker and Lightning Web Service.

To make your component available for use in the utility bar, include the `lightning__UtilityBar` target in your component's `.js-meta.xml` configuration file.

These Utility Bar API methods for LWC are available for Lightning console apps.

- `enableModal()` —Toggles modal mode for a utility.
- `enablePopout()` —Toggles pop-out mode on a utility.
- `getAllUtilityInfo()` —Returns the state of all utilities.
- `getInfo()` —Returns the state of the current utility.
- `minimize()` —Minimizes a utility.
- `onUtilityClick()` —Registers an event handler for the utility.
- `open()` —Opens a utility or minimizes a utility if it's already open.

- `updatePanel()` —Specifies a label and icon on the utility panel, and provides a height and width for the panel.
- `updateUtility()` —Specifies a label and icon on the utility bar, and sets a utility as highlighted.

The `EnclosingUtilityId()` wire adapter is available for Lightning console apps. It returns the ID of the enclosing utility.

To retrieve the record context from a component in a utility, use the `CurrentPageReference` wire adapter.

SEE ALSO:

[Salesforce Console Developer Guide](#)

[New and Changed Modules for Lightning Web Components](#)

Confirm Your Components Use Supported Design System Customizations

Salesforce is modifying internal implementations of our own Lightning components, Salesforce Lightning Design System (SLDS) styles, and custom properties to support future UI changes. These internal changes won't cause visible UI changes for most customers. If you customize your components or sites using supported techniques, we expect these changes to have little to no impact on your customizations. However, if your components use unsupported customizations, we recommend that you update them to use supported techniques to prevent visual regressions.

Where: These changes apply to Lightning Experience, Experience Cloud sites, and all versions of the Salesforce mobile app in all editions. For information on the timing and availability of these enhancements in new and existing orgs, see [Enhanced Lightning User Interface](#) in Salesforce Help.

Why: At Salesforce, we're constantly improving our UI architecture and planning for the future. For this reason, Salesforce can at any point change the internal implementation of UI components. Starting in the Summer '24 release, we're changing the internals of some UI components, which can change the rendered DOM. Don't modify the DOM elements of Salesforce components via CSS or JavaScript or target SLDS classes in unit tests. See [Salesforce Component Internals Are Protected](#).

If you customize Lightning pages or Experience Cloud sites by targeting Salesforce components and CSS styles that change with the architecture updates, some visual regressions are possible. Visual regressions can range from a UI component displaying a slightly different color to layout changes in your UI.

How: For information about supported and unsupported customization techniques, and how to update your customizations, see the [SLDS Architecture Updates FAQ](#).

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, 62 components have been adapted to prepare for native shadow DOM, as we announced in [the Spring '24 release notes](#).

In Summer '24, these additional components have been adapted to prepare for native shadow DOM.

- `lightning-button`
- `lightning-file-upload`
- `lightning-formatted-name`

- `lightning-formatted-number`
- `lightning-navigation`
- `lightning-progress-bar`
- `lightning-progress-ring`
- `lightning-select`
- `lightning-textarea`

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:

To ensure that your tests are ready for the internal DOM structure changes, review your integration tests and selenium-based tests. Additionally, make sure that your component CSS follows best practices. 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*.

Class and Style Attributes Render with Extra Whitespaces

More components render with extra whitespaces in the `class` and `style` attributes. In Spring '23, we announced an improved rendering time for your Lightning web components as a result of an optimization on how the framework handles static elements. That change influenced how the `class` and `style` attributes of your static nodes are rendered in the DOM. Extra whitespaces or unexpected characters sometimes appear in values for those attributes.

Where: This change applies to custom Lightning web components in Lightning Experience, Experience Builder sites, and all versions of the Salesforce mobile app. This change also applies to Lightning web components open source.

How: An element with class values can render with an extra space. For example, consider this element with the `highlight` and `yellow` class values.

```
<div class=" highlight yellow">
```

We recommend updating code that uses `style` or `class` attributes. Previously, you could query elements with an exact class name.

```
// Don't do this
document.querySelector('[class="highlight yellow"]')
```

Revise the query to use a selector that ignores whitespace changes.

```
// Do this instead
document.querySelector('.highlight.yellow')
```

SEE ALSO:

[Lightning Web Components Developer Guide: Anti-Patterns for Styling Components](#)

Lightning Web Security Enablement Rollout Postponed

Starting in Spring '22, Salesforce began enabling Lightning Web Security (LWS) in some customer orgs. To minimize disruption for customers with highly customized environments, we're postponing automatic enablement until further notice. If LWS isn't enabled yet in your org, we encourage you to enable it in a sandbox environment to test your components running in LWS.

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

SEE ALSO:

[Lightning Web Components Developer Guide: Lightning Web Security](#)

[Lightning Web Components Developer Guide: Workflow to Try Your LWCs in Lightning Web Security](#)

[Lightning Web Security FAQ](#)

API Distortion Changes in Lightning Web Security

Lightning Web Security includes new security protections with additional distortions for web APIs. ESLint rules matching the distortions are also available. In addition, some distortions have changed and one was removed.

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.

- `Window.requestFileSystem`
- `Window.webkitRequestFileSystem`

These distortions changed.

- `CustomElementRegistry.prototype.define`
- `Element.prototype.attachShadow`
- `Element.prototype.shadowRoot` getter
- `HTMLIFrameElement.prototype.src` setter
- `HTMLObjectElement.prototype.data` setter

This distortion and associated ESLint rule was removed.

- `ShadowRoot.prototype.mode` getter

Visualforce

Check whether you're affected when all unmanaged Visualforce pages are served on the force.com domain. To check if the new default behavior of the `<apex:sectionHeader>` component affects your orgs, review the uses of markup in the component's `description` attribute.

IN THIS SECTION:

[Update References to Visualforce Pages Served on Salesforce.com](#)

If your unmanaged Visualforce pages are served on the salesforce.com domain, update hard-coded references, links, bookmarks, and external integrations to those pages. To ensure continued access when browsers block third-party cookies, all Visualforce pages are served on the force.com domain or a site domain.

[Updated Default Behavior of Visualforce Section Header Components](#)

The new behavior of the `description` attribute makes the Visualforce `<apex:sectionHeader>` component secure by default. Only commonly used, secure HTML elements are evaluated in the `description` attribute's output. Previously, all markup characters were evaluated. Now Visualforce pages, templates, and other components that contain `<apex:sectionHeader>` components are protected against cross-site scripting (XSS) attacks. The component also has a new `escape` attribute so that customers can override the default behavior if desired.

Update References to Visualforce Pages Served on Salesforce.com

If your unmanaged Visualforce pages are served on the salesforce.com domain, update hard-coded references, links, bookmarks, and external integrations to those pages. To ensure continued access when browsers block third-party cookies, all Visualforce pages are served on the force.com domain or a site domain.

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

How: To determine whether this change applies to you and to make the required updates, see the knowledge article [Ensure Access to Your Visualforce Pages in Summer '24 and Winter '25](#).

Updated Default Behavior of Visualforce Section Header Components

The new behavior of the `description` attribute makes the Visualforce `<apex:sectionHeader>` component secure by default. Only commonly used, secure HTML elements are evaluated in the `description` attribute's output. Previously, all markup characters were evaluated. Now Visualforce pages, templates, and other components that contain `<apex:sectionHeader>` components are protected against cross-site scripting (XSS) attacks. The component also has a new `escape` attribute so that customers can override the default behavior if desired.

Where: This change applies to Lightning Experience, Salesforce Classic (not available in all orgs), and all versions of the Salesforce mobile app in all editions.

How: To secure Visualforce pages with `<apex:sectionHeader>` components, no action is required. To make sure that your users see the correct output, audit your implementation for uses of markup in the component's `description` attribute. Then set the corresponding `escape` attribute to one of the three behaviors.

- When the `escape` attribute isn't set, the `description` attribute allows commonly used, secure HTML elements. Uncommon HTML elements, insecure attributes, and all JavaScript are removed. We recommend that you remove any unsupported markup from the `description` attribute. Users can't see unsupported HTML elements, and extraneous markup characters render as plain text.
- When the `escape` attribute is set to `true`, all markup contained in the component's `description` attribute is escaped. We recommend that you remove all markup from the `description` attribute. Otherwise, users can see these characters rendered as plain text.
- When the `escape` attribute is set to `false`, all markup contained in the component's `description` attribute is evaluated.



Warning: Setting the `escape` attribute's value to `false` makes pages that contain `<apex:sectionHeader>` vulnerable to XSS attacks.

With a new User Interface setting, you can optionally set the default `escape` value of all `<apex:sectionHeader>` components in your org to `false`. From Setup, in the Quick Find box, enter *User Interface*, and then select **User Interface**. Select **Set the default value of the escape attribute in <apex:sectionHeader> components to false**, and then save your changes. To override this behavior on an individual `<apex:sectionHeader>` component, manually set the `escape` attribute.



Warning: Selecting this setting makes pages containing `<apex:sectionHeader>` vulnerable to XSS attacks. We recommend that you keep this setting unselected.

We recommend that Independent Software Vendors (ISVs) explicitly set the `escape` attribute of any `<apex:sectionHeader>` components used. Setting the `escape` attribute overrides the default behavior that the subscriber org configures, so `<apex:sectionHeader>` retains the expected behavior in all subscriber orgs.

SEE ALSO:

[Knowledge Article: The Description Attribute of the Visualforce Section Header Component Doesn't Render Some HTML Elements](#)

[Visualforce Developer Guide: Unescaped Output and Formulas in Visualforce Pages](#)

[Visualforce Developer Guide: apex:sectionHeader](#)

Apex

Use new Apex cursors to break up the processing of a SOQL query result into pieces that can be processed within the bounds of a single transaction. Formula evaluation in Apex is now in beta. Use SOQL in Apex and mock SOQL tests for Data Cloud objects. Understand security considerations when using Apex with Data Cloud objects. Apex now supports SOQL relationship queries that traverse up to five levels of parent-child records. Track Apex scheduled job limits, edit jobs, and view enhanced job details on the All Scheduled Jobs page in Setup. Instance methods in a subclass don't override private methods with the same signature. Monitor limits and cumulative run time for setup methods using `ApexTestResult`. See enhanced error messages on deleting a class, improved logging when FOR UPDATE locks are released, and information on org, user, and My Domain names in Apex exception emails.

For more information on these enhancements, see the [Apex Developer Guide](#) and the [Apex Reference Guide](#).

IN THIS SECTION:

[Use Cursors for Expanded SOQL Query Result Support \(Beta\)](#)

With Apex cursors, you can break up the processing of a SOQL query result into pieces that can be processed within the bounds of a single transaction. Cursors provide you with the ability to work with large query result sets, while not actually returning the entire result set. You can traverse a query result in parts, with the flexibility to navigate forward and back in the result set. Package developers and advanced developers can use cursors effectively to work with high-volume and high-resource processing jobs. Cursors are an alternative to batch Apex and address some of batch Apex's limitations. Cursors are also more powerful because they can be used in a chain of queueable Apex jobs.

[Evaluate Dynamic Formulas in Apex \(Beta\)](#)

Dynamic formulas in Apex now support using an `Object` as the context object. Use the new `Formula.builder()` method to create an instance of the `FormulaBuilder` to configure the formula. Get a list of the field names as referenced in a formula using the `getReferencedFields()` method. Formula evaluation in Apex is bound by the character limit, but not the compile size limit.

[Use SOQL in Apex with Data Cloud Objects](#)

Static SOQL is now supported with Data Cloud data model objects (DMOs) as a more direct alternative to using either dynamic SOQL or ConnectAPI. Additionally, SOQL using `Apex.Database.QueryLocator` or in FOR loops is supported in API version 61.0 and later. In versions earlier than 61.0, only the first 201 records are returned. Batch Apex is currently blocked against DMOs when using `QueryLocators`, but is supported when using `Iterable`.

[Consider Field- and Record-Level Access When Using Apex With Data Cloud Objects](#)

Data Cloud data model objects (DMOs) in all data spaces are accessible from Apex in system mode, even when a permission set for the data space isn't explicitly assigned. Read-only object-level access checks are supported if the user has access to the data space. There's currently no support for field-level security or for record-level access control. Apex features, such as `WITH USER_MODE`, `WITH SECURITY_ENFORCED`, describe calls, and `Security.stripInaccessible()`, can check only object-level access for DMOs.

[Mock SOQL Tests for Data Cloud Objects](#)

Mock SOQL query responses for Data Cloud data model objects (DMOs) in Apex testing by using the new SOQL stub methods and a new test class. Use static or dynamic SOQL queries against DMOs and return mock records in a testing context.

[Support for Five-Level Parent-to-Child Relationship SOQL Queries in Apex](#)

Apex now supports SOQL relationship queries that traverse up to five levels of parent-child records. Each parent-child relationship subquery counts towards the number of aggregate queries processed in an SOQL query statement.

[Make Invocable Actions Easier to Configure with New `InvocableVariable` Modifiers](#)

Set a default value for an input parameter by using the new `defaultValue` modifier. Set custom placeholder text for an input parameter and provide examples or additional guidance by using the `placeholderText` modifier. The `defaultValue` and `placeholderText` modifiers appear in Flow Builder for the Action elements that correspond to an invocable method.

[IdeaExchange Delivered: Monitor Apex Scheduled Jobs More Efficiently](#)

Mitigate potential limit problems before they happen by tracking the percentage of the scheduled jobs used. You can now schedule Apex jobs from the All Scheduled Jobs page and manage jobs that are scheduled using a cron expression. You can also view the ID of the `CronTrigger` object associated with scheduled jobs in the details list. We delivered this feature thanks to your ideas on IdeaExchange.

[Update the API Version of Abstract or Virtual Classes to Prevent Overriding Private Methods](#)

In API version 61.0 and later, private methods are no longer overridden by an instance method with the same signature in a subclass. This change is versioned, so to prevent the override, update your abstract or virtual classes that contain private methods to API version 61.0 or later. In API version 60.0 and earlier, if a subclass declares an instance method with the same signature as a private method in one of its superclasses, the private method is overridden by the method in the subclass.

[IdeaExchange Delivered: Monitor Setup Methods Using `ApexTestResult`](#)

`ApexTestResult` rows are now generated for Apex tests run with the `@testSetup` annotation. A new `IsTestSetup` column is set to `true` for these annotated tests to distinguish them from other test methods. Also, a new `TestSetupTime` column on `ApexTestRunResult` tracks the cumulative time of all setup methods for the given `ApexTestRunResult`, similar to how `TestTime` tracks the cumulative time of all its test methods. Previously, information about limits and cumulative run time was available only by parsing the appropriate method sections in the debug log. We delivered this feature thanks to your ideas on IdeaExchange.

[View `CronTrigger` and Batch Job IDs in Improved Error Messages with Scheduled and Batch Apex](#)

You can now see `CronTrigger` and batch job IDs in error messages generated when you delete a class in use by a scheduled or batch job. If you try to uninstall a package containing a class that's in use by a batch job, the error message also includes the Apex batch job ID. The error message lists up to five IDs. Also, if you modify a class that's being used by a batch job, the error message includes the `AsyncApexJob` ID.

[Ensure More Secure Compilation of Apex Classes](#)

Run the Compile all classes option on the Apex Classes page in Setup to achieve more reliable compilation. Compiling all classes from Setup now produces consistent compilation output as compared with other compilation mechanisms, such as metadata deployment or on-demand compilation.

[See Improved Logging When `FOR UPDATE` Locks Are Released](#)

Record locks that are obtained in Apex using `FOR UPDATE` are released automatically when you roll back to a savepoint that's set using the `Database.setSavePoint()` method. The information is now logged in the debug log, and the logged database category message includes the most recently locked entity type. For example: `FOR_UPDATE_LOCKS_RELEASE | FOR_UPDATE locks released due to a savepoint rollback. The most recent lock was Account.`

[Resolve Unhandled Exceptions Faster with Additional Information in Apex Exception Emails](#)

When your Apex code encounters unhandled exceptions, Apex exception emails now include the org name and My Domain name where the exception occurred. You can use these additional details to resolve the exception faster and improve the performance of your Apex code. Previously, the email included only the Apex stack trace, exception message, and the customer's org and user ID.

[See Improved Behavior with Custom Exceptions](#)

In API version 61.0 and later, the overridden `equals ()` and `hashCode ()` methods are correctly handled for custom exceptions. This behavior is versioned. In API 60.0 and earlier, these methods aren't called in some cases where exceptions are used, such as in Sets and Maps, or on an object reference of a custom exception instance.

[Support for Standard Fields in the `getRelationshipOrder` Method](#)

When you call the `DescribeFieldResult.getRelationshipOrder` method for a standard field, it now returns 0 if the field is the primary relationship field or 1 if the field is the secondary relationship field. This behavior is versioned. In API 60.0 and earlier, this method always returned `null` for a standard field.


SEE ALSO:

[Apex: New and Changed Items](#)

Use Cursors for Expanded SOQL Query Result Support (Beta)

With Apex cursors, you can break up the processing of a SOQL query result into pieces that can be processed within the bounds of a single transaction. Cursors provide you with the ability to work with large query result sets, while not actually returning the entire result set. You can traverse a query result in parts, with the flexibility to navigate forward and back in the result set. Package developers and advanced developers can use cursors effectively to work with high-volume and high-resource processing jobs. Cursors are an alternative to batch Apex and address some of batch Apex's limitations. Cursors are also more powerful because they can be used in a chain of queueable Apex jobs.

Where: This change applies to all editions.

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

How: Apex cursors are stateless and generate results from the offset that is specified in the `Cursor.fetch (integer position, integer count)` method. You must track the offsets or positions of the results within your particular processing scenario.

A cursor is created when a SOQL query is executed on a `Database.getCursor ()` or `Database.getCursorWithBinds ()` call. When a `Cursor.fetch (integer position, integer count)` method is invoked with an offset position and the count of records to fetch, the corresponding rows are returned from the cursor. The maximum number of rows per cursor is 50 million, regardless of the operation being synchronous or asynchronous. To get the number of cursor rows returned from the SOQL query, use `Cursor.getNumRecords ()`.

Apex cursors throw these new System exceptions: `System.FatalCursorException` and `System.TransientCursorException`. Transactions that fail with `System.TransientCursorException` can be retried.

Apex cursors have the same expiration limits as API Query cursors.

To get Apex cursor limits, use these new methods in the `Limits` class.

- `Limits.getApexCursorRows ()` and its upper bound `Limits.getLimitApexCursorRows ()` method
- `Limits.getFetchCallsOnApexCursor ()` and its upper bound `Limits.getLimitFetchCallsOnApexCursor ()` method

These Apex governor limits have been updated with this feature.

- Maximum number of rows per cursor: 50 million (both synchronous and asynchronous)
- Maximum number of fetch calls per transaction: 10 (both synchronous and asynchronous)
- Maximum number of cursors per day: 10,000 (both synchronous and asynchronous)

- Maximum number of rows per day (aggregate limit): 100 million

Example:

```
public class QueryChunkingQueueable implements Queueable {
    private Database.Cursor locator;
    private integer position;

    public QueryChunkingQueueable() {
        locator = Database.getCursor
            ('SELECT Id FROM Contact WHERE LastActivityDate = LAST_N_DAYS:400');

        position = 0;
    }

    public void execute(QueueableContext ctx) {
        List<Contact> scope = locator.fetch(position, 200);
        position += scope.size();
        // do something, like archive or delete the scope list records
        if(position < locator.getNumRecords() ) {
            // process the next chunk
            System.enqueueJob(this);
        }
    }
}
```

SEE ALSO:

[Salesforce Developer Limits and Allocations Quick Reference: API Query Cursor Limits](#)

Evaluate Dynamic Formulas in Apex (Beta)

Dynamic formulas in Apex now support using an SObject as the context object. Use the new `Formula.builder()` method to create an instance of the `FormulaBuilder` to configure the formula. Get a list of the field names as referenced in a formula using the `getReferencedFields()` method. Formula evaluation in Apex is bound by the character limit, but not the compile size limit.

Where: This change applies to all editions.



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

How: This example uses an SObject type as the context object in the `withType()` method to build and evaluate a formula.

```
FormulaEval.FormulaInstance likelyBuyer = Formula.builder()
    .withType(Account.SObjectType)
    .withReturnType(FormulaEval.FormulaReturnType.BOOLEAN)
    .withFormula('AnnualRevenue > 10000 AND ISPICKVAL(Industry, "Biomechanical")');
```

SEE ALSO:


[Apex Reference Guide: FormulaEval Namespace \(can be outdated or unavailable during release preview\)](#)

Use SOQL in Apex with Data Cloud Objects

Static SOQL is now supported with Data Cloud data model objects (DMOs) as a more direct alternative to using either dynamic SOQL or ConnectAPI. Additionally, SOQL using Apex `Database.QueryLocator` or in FOR loops is supported in API version 61.0 and later. In versions earlier than 61.0, only the first 201 records are returned. Batch Apex is currently blocked against DMOs when using `QueryLocators`, but is supported when using `Iterable`.

Where: This change applies to all editions.

How: This example uses static SOQL with the `UnifiedIndividual__dml` Data Cloud object.

 **Warning:** Running SOQL queries against DMOs can result in Data Services credits being consumed from your Data Cloud subscription. For more information on how usage is billed, see [Data Cloud Billable Usage Types](#). Use caution when using FOR loops, query locators, recursion, or any mechanism that can result in multiple queries to Data Cloud.

```
//Static SOQL example
List<UnifiedIndividual__dml> unifiedIndividuals = [
    SELECT
        Id,
        ssot__FirstName__c,
        ssot__LastName__c,
        ssot__Email__c,
        ssot__SkyMilesBalance__c,
        ssot__MedallionStatus__c
    FROM UnifiedIndividual__dml
    WHERE ssot__CompanyId__c = :companyId
];
```

Consider Field- and Record-Level Access When Using Apex With Data Cloud Objects

Data Cloud data model objects (DMOs) in all data spaces are accessible from Apex in system mode, even when a permission set for the data space isn't explicitly assigned. Read-only object-level access checks are supported if the user has access to the data space. There's currently no support for field-level security or for record-level access control. Apex features, such as `WITH USER_MODE`, `WITH SECURITY_ENFORCED`, describe calls, and `Security.stripInaccessible()`, can check only object-level access for DMOs.

Where: This change applies to all editions.

How: Starting with API version 61.0, you can get information on a specific DMO using `SObjectType.getDescribe()`. Currently, there's no field-level security to be enforced because all fields on DMOs that are accessed by field describes and security model checks are read only. You also can't use `Schema.getGlobalDescribe()` to discover exposed DMOs. Instead, use the `Schema.describeObjects(List<String>)` method with the known DMO API names.

Mock SOQL Tests for Data Cloud Objects

Mock SOQL query responses for Data Cloud data model objects (DMOs) in Apex testing by using the new SOQL stub methods and a new test class. Use static or dynamic SOQL queries against DMOs and return mock records in a testing context.

Where: This change applies to all editions.

How: Create mock test classes by extending the new `System.SqlStubProvider` class and overriding the `handleSqlQuery()` class method. Create DMO instances using either `Test.createStubQueryRow()` or `Test.createStubQueryRows()`. Register the mock provider in the test using `Test.createSqlStub()` and execute the test code.

 **Note:** Apex governor limits apply to the stubbed records.

The SOQL query must be against a DMO, either directly with a FROM clause or via a subquery. Also, these features are not allowed within a stub implementation.

- SOQL
- SOSL
- Callouts
- Future methods
- Queueable jobs
- Batch jobs
- DML
- Platform Events

This example shows a mock test class for the *SkyMilesForBusinessOptInController* class.

```
@IsTest
public class SkyMilesForBusinessOptInController_Test {

    @IsTest
    public static void mockSoql() {

        SoqlStubProvider stub = new UnifiedIndividualSoqlStub();
        Test.createSoqlStub(UnifiedIndividualSoqlStub__dml.sObjectType, stub);

        Assert.isTrue(Test.isSoqlStubDefined(UnifiedIndividualSoqlStub__dml.sObjectType));

        Test.startTest();
        string companyId = 'SampleCompanyId';
        // Performs SOQL query against Data Model Object
        List<SkyMilesMember> members =
        SkyMilesForBusinessOptInController.getSkyMilesProfilesFromDataCloud(companyId);

        Test.stopTest();

        Assert.areEqual(1, members.size());

        SkyMilesMember member = members[0];

        Assert.areEqual(companyId, member.CompanyId);
        Assert.areEqual(5000, member.SkyMilesBalance);
    }

    class UnifiedIndividualSoqlStub extends SoqlStubProvider {
        public override List<sObject> handleSoqlQuery(sObjectType sot, string stubbedQuery,
        Map<string, object> bindVars) {

            Assert.areEqual(UnifiedIndividual__dml.sObjectType, sot);

            // Stub assumes that the SOQL query is searching for a single record by company
            id
```

```

string companyId = 'Default';
if(bindVars.containsKey('tmpVar1')) {
    companyId = (string)bindVars.get('tmpVar1');
}

UnifiedIndividual__dml dmo = (UnifiedIndividual__dml)Test.createStubQueryRow(

    sot,
    new Map<string, object> {
        'ssot__FirstName__c' => 'Codey',
        'ssot__LastName__c' => 'Bear',
        'ssot__Email__c' => 'developer@salesforce.com',
        'ssot__SkyMilesBalance__c' => 5000,
        'ssot__MedallionStatus__c' => 'Gold',
        'ssot__CompanyId__c' => companyId
    }
);
return new List<sObject> { dmo };
}
}
}

```

```

public with sharing class SkyMilesForBusinessOptInController {
    public static List<SkyMilesMember> getSkyMilesProfilesFromDataCloud(String companyId)
    {
        List<UnifiedIndividual__dml> unifiedIndividuals = [
            SELECT
                Id,
                ssot__FirstName__c,
                ssot__LastName__c,
                ssot__Email__c,
                ssot__SkyMilesBalance__c,
                ssot__MedallionStatus__c,
                ssot__CompanyId__c
            FROM UnifiedIndividual__dml
            WHERE ssot__CompanyId__c = :companyId
        ];
        List<SkyMilesMember> skyMilesMembers = new List<SkyMilesMember>();
        for (UnifiedIndividual__dml individual : unifiedIndividuals) {
            skyMilesMembers.add(
                new SkyMilesMember(
                    individual.Id,
                    individual.ssot__FirstName__c,
                    individual.ssot__LastName__c,
                    individual.ssot__Email__c,
                    individual.ssot__SkyMilesBalance__c,
                    individual.ssot__MedallionStatus__c,
                    individual.ssot__CompanyId__c
                )
            );
        }
        return skyMilesMembers;
    }
}

```

```
}

```

SEE ALSO:

[Apex Developer Guide: DataCloud](#) (can be outdated or unavailable during release preview)

Support for Five-Level Parent-to-Child Relationship SOQL Queries in Apex

Apex now supports SOQL relationship queries that traverse up to five levels of parent-child records. Each parent-child relationship subquery counts towards the number of aggregate queries processed in an SOQL query statement.

Where: This change applies to all editions.

How: In API version 61.0 and later, SOQL parent-child relationship queries in Apex can contain a parent root as the first level of the query and child relationships up to four levels deep from the parent root. Track the number of aggregate queries processed in an SQL statement with the `Limits.getAggregateQueries()` method. The `Limits.getLimitAggregateQueries()` method returns a value of 300, which is the total number of aggregate queries that can be processed with SOQL query statements.

This example SOQL query statement includes five levels of parent-child relationships.

```
List<Account> accts =
[SELECT Name,
  (SELECT LastName,
    (SELECT AssetLevel,
      (SELECT Description,
        (SELECT LineItemNumber FROM WorkOrderLineItems)
        FROM WorkOrders)
      FROM Assets)
    FROM Contacts)
  FROM Account];

```

Make Invocable Actions Easier to Configure with New `InvocableVariable` Modifiers

Set a default value for an input parameter by using the new `defaultValue` modifier. Set custom placeholder text for an input parameter and provide examples or additional guidance by using the `placeholderText` modifier. The `defaultValue` and `placeholderText` modifiers appear in Flow Builder for the Action elements that correspond to an invocable method.

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

SEE ALSO:

[Apex Developer Guide: InvocableVariable Annotation](#)



Monitor Apex Scheduled Jobs More Efficiently

Mitigate potential limit problems before they happen by tracking the percentage of the scheduled jobs used. You can now schedule Apex jobs from the All Scheduled Jobs page and manage jobs that are scheduled using a cron expression. You can also view the ID of the `CronTrigger` object associated with scheduled jobs in the details list. We delivered this feature thanks to your ideas on IdeaExchange.

Where: This change applies to all editions.

How: From Setup, in the Quick Find box, enter *Scheduled Jobs*, and then select **Scheduled Jobs**. On the All Scheduled Jobs page, view the current consumption stats for the scheduled jobs along with the allowed org limit.

SEE ALSO:

[IdeaExchange: Apex Scheduler - Existing jobs need to be editable and show scheduling details](#)

[Salesforce Help: Monitoring Scheduled Jobs \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Schedule Apex Jobs \(can be outdated or unavailable during release preview\)](#)

Update the API Version of Abstract or Virtual Classes to Prevent Overriding Private Methods

In API version 61.0 and later, private methods are no longer overridden by an instance method with the same signature in a subclass. This change is versioned, so to prevent the override, update your abstract or virtual classes that contain private methods to API version 61.0 or later. In API version 60.0 and earlier, if a subclass declares an instance method with the same signature as a private method in one of its superclasses, the private method is overridden by the method in the subclass.

Where: This change applies to all editions.



Monitor Setup Methods Using ApexTestResult

`ApexTestResult` rows are now generated for Apex tests run with the `@testSetup` annotation. A new `IsTestSetup` column is set to `true` for these annotated tests to distinguish them from other test methods. Also, a new `TestSetupTime` column on `ApexTestRunResult` tracks the cumulative time of all setup methods for the given `ApexTestRunResult`, similar to how `TestTime` tracks the cumulative time of all its test methods. Previously, information about limits and cumulative run time was available only by parsing the appropriate method sections in the debug log. We delivered this feature thanks to your ideas on IdeaExchange.

Where: This change applies to all editions.

How: `ApexTestResult` is updated by default for all setup methods. You can opt out in one of these ways.

- From Setup, in the Quick Find box, enter *Apex Settings*, and then select **Do not create Apex test results for @TestSetup methods**.
- To disable this feature programmatically with Metadata API, use the `enableTestSetupSkipTestResults` option in `ApexSettings`.

SEE ALSO:

[IdeaExchange: Executing an Apex Test with @TestSetup annotation should generate ApexTestResult](#)

[Metadata API Developer Guide: ApexSettings \(can be outdated or unavailable during release preview\)](#)

View CronTrigger and Batch Job IDs in Improved Error Messages with Scheduled and Batch Apex

You can now see `CronTrigger` and batch job IDs in error messages generated when you delete a class in use by a scheduled or batch job. If you try to uninstall a package containing a class that's in use by a batch job, the error message also includes the Apex batch job ID. The error message lists up to five IDs. Also, if you modify a class that's being used by a batch job, the error message includes the `AsyncApexJob` ID.

Where: This change applies to all editions.

Ensure More Secure Compilation of Apex Classes

Run the Compile all classes option on the Apex Classes page in Setup to achieve more reliable compilation. Compiling all classes from Setup now produces consistent compilation output as compared with other compilation mechanisms, such as metadata deployment or on-demand compilation.

Where: This change applies to all editions.

Why: Previously, in some scenarios the Compile all classes option could compile classes that reference Salesforce entities that your organization doesn't have access to. Attempts to compile Apex classes that contain such references now result in compilation errors, such as `Invalid Type: SomeEntity`.

See Improved Logging When FOR UPDATE Locks Are Released

Record locks that are obtained in Apex using FOR UPDATE are released automatically when you roll back to a savepoint that's set using the `Database.setSavePoint()` method. The information is now logged in the debug log, and the logged database category message includes the most recently locked entity type. For example: `FOR_UPDATE_LOCKS_RELEASE | FOR UPDATE locks released due to a savepoint rollback. The most recent lock was Account.`

Where: This change applies to all editions.

Resolve Unhandled Exceptions Faster with Additional Information in Apex Exception Emails

When your Apex code encounters unhandled exceptions, Apex exception emails now include the org name and My Domain name where the exception occurred. You can use these additional details to resolve the exception faster and improve the performance of your Apex code. Previously, the email included only the Apex stack trace, exception message, and the customer's org and user ID.

Where: This change applies to all editions.

SEE ALSO:

[Apex Developer Guide: Unhandled Exception Emails \(can be outdated or unavailable during release preview\)](#)

See Improved Behavior with Custom Exceptions

In API version 61.0 and later, the overridden `equals()` and `hashCode()` methods are correctly handled for custom exceptions. This behavior is versioned. In API 60.0 and earlier, these methods aren't called in some cases where exceptions are used, such as in Sets and Maps, or on an object reference of a custom exception instance.

Where: This change applies to all editions.

Support for Standard Fields in the getRelationshipOrder Method

When you call the `DescribeFieldResult.getRelationshipOrder` method for a standard field, it now returns 0 if the field is the primary relationship field or 1 if the field is the secondary relationship field. This behavior is versioned. In API 60.0 and earlier, this method always returned `null` for a standard field.

Where: This change applies to all editions.

SEE ALSO:

[Apex Reference Guide: DescribeFieldResult.getRelationshipOrder](#) (can be outdated or unavailable during release preview)

API

Update records using external IDs and interact with an improved OpenAPI spec sObjects REST API. The previously announced retirement of API versions 21.0 through 30.0 of the Salesforce Platform API is delayed until Summer '25.

IN THIS SECTION:

[Update API Calls to Use Your My Domain Login URL](#)

To prevent service interruptions, update instanced URLs in your API calls to your My Domain login URL. An instanced URL contains your Salesforce instance. For example, `https://ap2.salesforce.com` contains the instance `ap2`. After your instance changes due to an org migration or an instance refresh, API traffic that uses a URL that contains your previous instance is no longer routed to your new instance. My Domain login URLs always use the correct instance.

[Update Records Using External IDs in REST API](#)

You can now update a record using the value of its external ID with the new `updateOnly` parameter in REST API. Previously, you could only upsert a record using its external ID.

[View More Details in the Updated OpenAPI Spec sObjects \(Beta\)](#)

View a details page and get more usable responses with the updated OpenAPI Spec sObjects REST API. The new details page contains information about the state of the current request and details of any errors that have occurred.

[Delete the Obsolete Salesforce API Only Systems Integrations User Profile](#)

We're updating the obsolete Salesforce API Only Systems Integration user profile from a standard to a custom profile so you can delete the profile in orgs where it exists.

[Benefit from Simplified Org Migration with Automatically Migrated Change Sets](#)

Before an org migration, you no longer need to keep a list of your metadata changes in order to preserve your existing change sets. Now, when Salesforce migrates an org from one instance to another, change sets are migrated during this process automatically.

[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.

Update API Calls to Use Your My Domain Login URL

To prevent service interruptions, update instanced URLs in your API calls to your My Domain login URL. An instanced URL contains your Salesforce instance. For example, `https://ap2.salesforce.com` contains the instance `ap2`. After your instance changes due to an org migration or an instance refresh, API traffic that uses a URL that contains your previous instance is no longer routed to your new instance. My Domain login URLs always use the correct instance.

Where: This change applies to all API versions.

When: API traffic that uses an incorrect instanced URL stops working on October 12, 2024.

How: To get your org's My Domain login URL, from Setup, in the Quick Find box, enter *My Domain*, and then select **My Domain**. Find your My Domain login URL in the Current My Domain URL field in the My Domain Details section.

My Domain Details		Edit
Current My Domain URL	mycompany.my.salesforce.com with enhanced domains	
My Domain Name	mycompany	
Domain Suffix	Standard (*.my.salesforce.com)	
		Edit

To find hard-coded references to instanced URLs, download your org's metadata. Then use a code editor such as Microsoft Visual Studio Code to search for instanced URLs. Replace the instanced URLs with your org's My Domain login URL.

For example, if your org's My Domain login URL is `mycompany.my.salesforce.com` and an API call uses `https://ap2.salesforce.com/services/Soap/class/DemoService`, update the API call to use `https://mycompany.my.salesforce.com/services/Soap/class/DemoService`.

SEE ALSO:

[Knowledge Article: Updating Hard-Coded References](#)

Update Records Using External IDs in REST API

You can now update a record using the value of its external ID with the new `updateOnly` parameter in REST API. Previously, you could only upsert a record using its external ID.

Where: This change affects API version 61.0 and later.

How: To prevent creating a new record if the target record can't be found or doesn't exist, add the `updateOnly` parameter to a URL that executes an upsert operation. You can also use URLs with the `updateOnly` parameter in composite REST API and composite graph REST API.

SEE ALSO:

[REST API Developer Guide: Upsert Records Using sObject Rows by External ID](#)

[REST API Developer Guide: Upsert Records Using sObject Collections](#)

View More Details in the Updated OpenAPI Spec sObjects (Beta)

View a details page and get more usable responses with the updated OpenAPI Spec sObjects REST API. The new details page contains information about the state of the current request and details of any errors that have occurred.

Where: This change affects API version 61.0 and later. This beta feature is available in Developer Editions, Partner Developer Editions, sandboxes, and scratch orgs that have API Enabled.

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

How: This release introduces important behavior changes to REST API:

- To get the OpenAPI document, use a URI that ends in `/locatorID/results`. Don't use a URI that ends in `/locatorID`.
- On a successful POST request, the server responds with an HTTP 202 status code (Accepted) and a JSON response body. That body contains a URI to view the details page and a URI to get the OpenAPI document.

- If an attempt is made to send more than one document request within 6 hours, an HTTP 429 status code with an error message is returned. Previously, an HTTP 202 status code with a non-error response body was returned.

SEE ALSO:

[REST API Developer Guide: Generating an OpenAPI 3.0 Document for sObjects REST API \(Beta\)](#)

[Idea Exchange: Ability to generate OpenAPI docs for REST-ful integration](#)

Delete the Obsolete Salesforce API Only Systems Integrations User Profile

We're updating the obsolete Salesforce API Only Systems Integration user profile from a standard to a custom profile so you can delete the profile in orgs where it exists.

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.

Why: The Salesforce API Only Systems Integration user profile was replaced with the more secure Minimum Access - API Only Integrations user profile in the Spring '24 release.

Benefit from Simplified Org Migration with Automatically Migrated Change Sets

Before an org migration, you no longer need to keep a list of your metadata changes in order to preserve your existing change sets. Now, when Salesforce migrates an org from one instance to another, change sets are migrated during this process automatically.

Where: This change applies to all Salesforce editions.

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.

Packaging

Packaging facilitates the development and distribution of business apps. Use second-generation managed packages to create apps to sell and distribute on AppExchange. Use unlocked packages to develop internal business apps.

IN THIS SECTION:

[Use Second-Generation Managed Packaging to Build Data Cloud Apps](#)

You now get all the benefits of second-generation managed packaging for Data Cloud features. When you package Data Cloud metadata, add it to a data kit first and then add the data kit to a package. Data Cloud apps must contain only Data Cloud metadata.

[Quickly Iterate Package Development Using Async Validation](#)

When creating a new package version, you have the option to specify async validation. Async validation creates a new package version before completing package validations. By receiving the package version earlier in the process, you can install and test the new version right away. If your development team is using continuous integration (CI) scripts, async validation can reduce your overall CI run time.

[Shorten Package Install Time in Scratch Orgs by Skipping a Handler](#)

To shorten package install time when installing in scratch orgs, you can specify the `FeatureEnforcement` skip handler when using either the `PackageInstallRequest` object, or the `sf package install` command. The feature enforcement handler adds object and feature validations in the subscriber org that prevent an admin from turning off a feature that would cause your app to malfunction. However, this enforcement isn't critical in scratch orgs.

[Package External Client Apps In Second-Generation Managed Packages](#)

Take advantage of the external client apps framework. The new and improved generation of connected apps is catching up to connected apps fast. The new framework now supports headless login, passwordless login, and guest user flows using the Authorization Code and Credentials Flow. You can also configure an external client app to issue JSON Web Token (JWT)-based access tokens, which is required for the guest user flow. External client apps can be included in second-generation managed packages.

[Explore the Updated Documentation for Components in Managed Packages](#)

We've made it easier to discover which components can be packaged in second-generation managed packages (2GP), first-generation managed packages (1GP), or both package types. Component documentation is now in both the 2GP and 1GP developer guides. Each guide displays only the components available in that package type, and indicates whether the component can be packaged in both types.

Use Second-Generation Managed Packaging to Build Data Cloud Apps

You now get all the benefits of second-generation managed packaging for Data Cloud features. When you package Data Cloud metadata, add it to a data kit first and then add the data kit to a package. Data Cloud apps must contain only Data Cloud metadata.

Where: This change applies to second-generation managed packages.

When: This functionality is available starting in April 2024.

Who: Data Cloud Second-Generation Managed Packaging is available only to Salesforce Partners.

SEE ALSO:

[Salesforce Release Notes: Build Data Cloud Apps Using Second-Generation Managed Packaging](#)

[Data Cloud Developer Guide: Packages and Data Kits \(can be outdated or unavailable during release preview\)](#)

[Data Cloud Developer Guide: Metadata Components for Data Cloud Cheat Sheet \(can be outdated or unavailable during release preview\)](#)

Quickly Iterate Package Development Using Async Validation

When creating a new package version, you have the option to specify async validation. Async validation creates a new package version before completing package validations. By receiving the package version earlier in the process, you can install and test the new version right away. If your development team is using continuous integration (CI) scripts, async validation can reduce your overall CI run time.

Where: This change applies to unlocked packages and second-generation managed packages.

When: Async validation is available starting on June 15, 2024.

How: Specify async validation when you create a new package version.

```
sf package version create --async-validation <rest of command syntax>
```

Shorten Package Install Time in Scratch Orgs by Skipping a Handler

To shorten package install time when installing in scratch orgs, you can specify the `FeatureEnforcement` skip handler when using either the `PackageInstallRequest` object, or the `sf package install` command. The feature enforcement handler adds object and feature validations in the subscriber org that prevent an admin from turning off a feature that would cause your app to malfunction. However, this enforcement isn't critical in scratch orgs.

Where: This change applies to unlocked packages, second-generation managed packages, and first-generation managed packages installed in scratch orgs.

How: Set the `SkipHandler` field on the `PackageInstallRequest` object to `FeatureEnforcement`.

Or use the CLI and specify:

```
sf package install --skip-handlers FeatureEnforcement <rest of command syntax>
```

Package External Client Apps In Second-Generation Managed Packages

Take advantage of the external client apps framework. The new and improved generation of connected apps is catching up to connected apps fast. The new framework now supports headless login, passwordless login, and guest user flows using the Authorization Code and Credentials Flow. You can also configure an external client app to issue JSON Web Token (JWT)-based access tokens, which is required for the guest user flow. External client apps can be included in second-generation managed packages.

Where: This change applies to second-generation managed packages.

SEE ALSO:

[Salesforce Release Notes: New OAuth Enhancements for External Client Apps](#)

[Salesforce Help: External Client Apps \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Configure Packageable External Client Apps \(can be outdated or unavailable during release preview\)](#)

[Second-Generation Managed Packaging Developer Guide: External Client App Header](#)

Explore the Updated Documentation for Components in Managed Packages

We've made it easier to discover which components can be packaged in second-generation managed packages (2GP), first-generation managed packages (1GP), or both package types. Component documentation is now in both the 2GP and 1GP developer guides. Each guide displays only the components available in that package type, and indicates whether the component can be packaged in both types.

Where: This change applies to the second-generation managed packaging and first-generation managed packaging developer guides.

SEE ALSO:

[2GP Developer Guide: Components in Second-Generation Managed Packages](#)

[1GP Developer Guide: Components in 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.

IN THIS SECTION:

[Data Mask](#)

Click into specific information about each mask, and automate how frequently Data Mask runs. Enjoy faster job processing times, better handling of complex data, and protect your data with automation bypasses.

[Select Who Has Sandbox Access for Production Orgs with 60 or More Public Groups](#)

We've expanded the functionality for Selective Sandbox Access! We now support providing access to a sandbox through a public group if your production org has 60 or more public groups. Previously, this feature was available only in production orgs with fewer than 60 public groups.

[Capture a Scratch Org's Configuration with Scratch Org Snapshots \(Generally Available\)](#)

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. New features since beta include support for Salesforce Platform and Limited Access user licenses, the extension of the snapshot expiration period to 90 days, and the ability to change the snapshot's language.

[Increase Sandbox Security with Inactive User Freezing](#)

The Inactive User Freezing feature increases sandbox security by freezing users in a Developer or Developer Pro sandbox within the first 60 days based on the time the user was created. This feature can't be disabled.

[New User Permission: Manage Dev Sandboxes](#)

Provide users the ability to create, clone, refresh, and delete only Developer and Developer Pro sandboxes. Developers are empowered to manage their own developer sandboxes while restricting access to production data that is copied in Partial Copy and Full sandboxes.

[Test Data Cloud Features in a Sandbox \(Beta\)](#)

Access Data Cloud features in the same sandbox org that you use for testing, staging, and training. When you create a sandbox, all your production org Data Cloud metadata and configurations are replicated in the sandbox. Use a data kit and a change set to deploy Data Cloud changes made in a sandbox back to production.

Data Mask

Click into specific information about each mask, and automate how frequently Data Mask runs. Enjoy faster job processing times, better handling of complex data, and protect your data with automation bypasses.

IN THIS SECTION:

[Access Information About Specific Data Mask Job](#)

The Run Logs tab in Data Mask is now the Jobs tab. From a list view in the Jobs tab, you can click the Data Mask name to view specific information about each mask, such as configured objects, current job progress, and any errors thrown by the current job.

[Automate the Running of Data Mask Processes with Job Scheduler](#)

Configure how frequently you run Data Mask, daily, weekly, or monthly, to mask all new data in your sandbox.

[Other Improvements to Salesforce Data Mask](#)

We've optimized the record loading and transformation so Data Mask jobs complete faster. When it completes a job, Data Mask now bypasses automation rather than deactivating or reactivating when a job is complete. Data Mask deletes field-history tracking instead of turning it off for the masking process. Serial mode is removed as jobs automatically retry records when row-locked.

Access Information About Specific Data Mask Job

The Run Logs tab in Data Mask is now the Jobs tab. From a list view in the Jobs tab, you can click the Data Mask name to view specific information about each mask, such as configured objects, current job progress, and any errors thrown by the current job.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Unlimited, and Developer editions where Data Mask is installed.

Who: This change is available to customers who want to install the latest managed package, 2.1000.

Automate the Running of Data Mask Processes with Job Scheduler

Configure how frequently you run Data Mask, daily, weekly, or monthly, to mask all new data in your sandbox.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Unlimited, and Developer editions where Data Mask is installed.

Who: This change is available to customers who want to install the latest managed package, 2.1000.

Other Improvements to Salesforce Data Mask

We've optimized the record loading and transformation so Data Mask jobs complete faster. When it completes a job, Data Mask now bypasses automation rather than deactivating or reactivating when a job is complete. Data Mask deletes field-history tracking instead of turning it off for the masking process. Serial mode is removed as jobs automatically retry records when row-locked.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Unlimited, and Developer editions where Data Mask is installed.

Who: This change is available to customers who want to install the latest managed package, 2.1000.

Select Who Has Sandbox Access for Production Orgs with 60 or More Public Groups

We've expanded the functionality for Selective Sandbox Access! We now support providing access to a sandbox through a public group if your production org has 60 or more public groups. Previously, this feature was available only in production orgs with fewer than 60 public groups.

Where: This change applies to sandboxes of Professional, Enterprise, Performance, Unlimited, and Database.com editions.

Who: All users in the production org with the Manage Dev Sandboxes (Developer or Developer Pro only) or Manage Sandboxes user permission.

Why: 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.

How: If the production org has 60 or more public groups, enter a public group name for **Sandbox Access** when creating or refreshing a sandbox.

SEE ALSO:

[Salesforce Help: Determine Who Has Sandbox Access](#)

[Salesforce Help: Create and Edit Groups](#)

[Salesforce Help: Freeze or Unfreeze User Accounts](#)

[Salesforce Help: Create a Sandbox](#)

[Salesforce Help: Refresh a Sandbox](#)

Capture a Scratch Org's Configuration with Scratch Org Snapshots (Generally Available)

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. New features since beta include support for Salesforce Platform and Limited Access user licenses, the extension of the snapshot expiration period to 90 days, and the ability to change the snapshot's language.

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

When: This feature will be available on a rolling basis starting in late June 2024.

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: Using Setup, 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](#)

Increase Sandbox Security with Inactive User Freezing

The Inactive User Freezing feature increases sandbox security by freezing users in a Developer or Developer Pro sandbox within the first 60 days based on the time the user was created. This feature can't be disabled.

Where: This change applies to Developer and Developer Pro sandboxes.

When: This feature is available on a rolling basis starting in July 2024.

Who: Any user who hasn't logged in to an existing or newly created, cloned, or refreshed Developer or Developer Pro sandbox within the first 60 days is frozen.

How: This process runs automatically. You can provide access to frozen users by unfreezing their user accounts.

SEE ALSO:

[Salesforce Help: Inactive User Freezing](#)

[Salesforce Help: Freeze or Unfreeze User Accounts](#)

New User Permission: Manage Dev Sandboxes

Provide users the ability to create, clone, refresh, and delete only Developer and Developer Pro sandboxes. Developers are empowered to manage their own developer sandboxes while restricting access to production data that is copied in Partial Copy and Full sandboxes.

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

When: This user permission is available when your production org is upgraded to the Summer '24 release.


Who: All users with the Manage Dev Sandboxes user permission. Only users with the existing Manage Sandboxes user permission can manage Partial Copy and Full sandboxes.

How: Assign the Manage Dev Sandboxes user permission via a profile or permission set.

Test Data Cloud Features in a Sandbox (Beta)

Access Data Cloud features in the same sandbox org that you use for testing, staging, and training. When you create a sandbox, all your production org Data Cloud metadata and configurations are replicated in the sandbox. Use a data kit and a change set to deploy Data Cloud changes made in a sandbox back to production.

Where: This change applies to Data Cloud in Enterprise, Performance, and Unlimited editions. The production org must have a Data Cloud license.

 **Note:** Data Cloud in Sandbox is a pilot or beta service that is subject to the Beta Services Terms at [Agreements - Salesforce.com](#) or a written Unified Pilot Agreement if executed by Customer, and applicable terms in the [Product Terms Directory](#). Use of this pilot or beta service is at the Customer's sole discretion. You can provide feedback and suggestions for the feature in the [Trailblazer Community](#).

When: This functionality is available in July 2024.

SEE ALSO:

[Salesforce Release Notes: Work with Data Cloud in a Sandbox Org \(Beta\)](#)

[Salesforce Release Notes: Deploy Changes From a Sandbox \(Beta\)](#)

Platform Development Tools

Build applications collaboratively and deliver continuously with Salesforce Developer Experience (DX), the open and integrated experience for custom app development on Salesforce.

IN THIS SECTION:

[Salesforce CLI Enhancements](#)

Use Salesforce CLI to create environments for development and testing, synchronize source code, run tests, and control your application lifecycle.

[Salesforce Extensions for Visual Studio Code](#)

The Salesforce extension pack includes tools for developing on the Customer 360 Platform in the lightweight, extensible VS Code editor.

[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.

[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.

[Deploy Scalable Apps with Scale Center](#)

We've added additional org performance metrics for connection pools, Visualforce, and sync/async callout errors. You can also view recommendations to improve SOQL performance in the database CPU investigation. And you can export ApexGuru insights in PDF format.

[Plan and Test with Scale Test](#)

Book a slot on your sandbox instance calendar and test at production peak load. Compare performance data from recent tests. Get in-app notifications and email confirmations about booking start times, end times, and cancellations.

Salesforce CLI Enhancements

Use Salesforce CLI to create environments for development and testing, synchronize source code, run tests, and control your application lifecycle.

We release new versions of Salesforce CLI weekly. Here's a taste of some of the new and changed features we recently delivered; these changes apply to Salesforce CLI version 2.44.8 and later.

Source Mobility (Beta)

Move source files inside your local Salesforce DX project without source-tracking thinking that you've deleted and then recreated a metadata component. To use this opt-in beta feature, set the `SF_BETA_TRACK_FILE_MOVES` environment variable to `true`. Then reorganize your files as you like!

Keep these considerations in mind.

- Source Mobility works with file moves, not file renames. Salesforce CLI still interprets renaming a source file as deleting a metadata component and then creating one with the different name.
- Child source files can move only to an identically named parent. For example, a custom field can move between Object folders in different package directories only if both Object folders have the same name.

Improved data Commands (Beta)

Import and export test data more easily with the improved `data import|export tree` commands. For example, you can now export more than two levels of child objects in a query when using `data export tree --plan`. The `data import`

`tree --plan` command can now handle files that contain more than 200 records. To try out the improvements, use the `data import beta tree` and `data export beta tree` commands.

Decompose More Metadata Types (Beta)

Track changes in custom labels, permission sets, sharing rules, and workflows more easily by specifying that Salesforce CLI decompose their large metadata files into smaller and easily digestible source files. Custom objects have always worked this way, and developers love it, so we decided to extend the functionality to these metadata types too.

Refresh a Sandbox from Salesforce CLI

Easily refresh a sandbox from the command line with the new `org refresh sandbox` CLI command.

Store Flag Values in Local Text Files

Simplify and shorten long CLI commands by storing flag values in local text files. Let's say, for example, that you run this CLI command to insert a new record into the Account object.

```
sf data create record --subject Account --values "Name='Universal Containers'
Website=www.example.com BillingAddress='123 Main St., Oakland, CA' <many more fields>"
--target-org myorg
```

Because Account has many fields, the CLI command could potentially get so long that it exceeds the maximum length of a terminal command. With this new feature, you can shorten the command by storing the value of all its flags in local text files and then run the command this way:

```
sf data create record --flags-dir flags/values.txt
```

More Colorful Help

The `--help` output of all commands now uses colors to highlight the different parts. If you don't like the default colors, you can customize them.

SEE ALSO:

[GitHub: Salesforce CLI Release Notes](#)

[GitHub: New "data import|export beta tree" Commands](#)

[Salesforce DX Developer Guide: Create, Clone, or Refresh a Sandbox](#)

[Salesforce CLI Setup Guide: Customize the Colors in Help Output](#)

Salesforce Extensions for Visual Studio Code

The Salesforce extension pack includes tools for developing on the Customer 360 Platform in the lightweight, extensible VS Code editor. We release new versions of the extensions weekly. Read the weekly release notes to learn about [recent updates](#).

IN THIS SECTION:

[Get Started Faster on Salesforce Extensions for Visual Studio Code with the New Documentation Site](#)

The new documentation site has a UI that is more consistent with other developer guides. The new site aggregates all the documentation for Salesforce Extensions for Visual Studio Code in a site that's easier to navigate. Requests to the old documentation site redirect to the new site.

SEE ALSO:

[Salesforce Extensions for Visual Studio Code](#)

Get Started Faster on Salesforce Extensions for Visual Studio Code with the New Documentation Site

The new documentation site has a UI that is more consistent with other developer guides. The new site aggregates all the documentation for Salesforce Extensions for Visual Studio Code in a site that's easier to navigate. Requests to the old documentation site redirect to the new site.

Where: The new documentation site is available on developer.salesforce.com.

SEE ALSO:

[Get Started Faster on Code Builder with the New Documentation Site](#)

[Get Started Faster on Einstein for Developers with the New Documentation Site](#)

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.

We release new versions of Code Builder, as needed.

See the off-cycle [Code Builder release notes](#) on GitHub.

IN THIS SECTION:

[Get Started Faster on Code Builder with the New Documentation Site](#)

The new documentation site has a UI that is more consistent with other developer guides. The new site aggregates all the documentation for Code Builder in a site that's easier to navigate. Requests to the old documentation site redirect to the new site.

SEE ALSO:

[Code Builder Developer Guide](#)

Get Started Faster on Code Builder with the New Documentation Site

The new documentation site has a UI that is more consistent with other developer guides. The new site aggregates all the documentation for Code Builder in a site that's easier to navigate. Requests to the old documentation site redirect to the new site.

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SEE ALSO:

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[Get Started Faster on Einstein for Developers with the New Documentation Site](#)

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.

IN THIS SECTION:[Get Started Faster on Einstein for Developers with the New Documentation Site](#)

The new documentation site has a UI that is more consistent with other developer guides. The new site aggregates all the documentation for Einstein for Developers (beta) in a site that's easier to navigate. Requests to the old documentation site redirect to the new site.

SEE ALSO:

[Einstein for Developers \(Beta\)](#)

Get Started Faster on Einstein for Developers with the New Documentation Site

The new documentation site has a UI that is more consistent with other developer guides. The new site aggregates all the documentation for Einstein for Developers (beta) in a site that's easier to navigate. Requests to the old documentation site redirect to the new site.

Where: The new documentation site is available on developer.salesforce.com.

SEE ALSO:

[Get Started Faster on Salesforce Extensions for Visual Studio Code with the New Documentation Site](#)

[Get Started Faster on Code Builder with the New Documentation Site](#)

Deploy Scalable Apps with Scale Center

We've added additional org performance metrics for connection pools, Visualforce, and sync/async callout errors. You can also view recommendations to improve SOQL performance in the database CPU investigation. And you can export ApexGuru insights in PDF format.

Where: This change applies to Lightning Experience in Unlimited Edition. Scale Center isn't supported in Government Cloud Plus.

Who: Scale Center is generally available at no additional cost for all Unlimited Edition Full Copy Sandbox, Signature, and Scale Test customers. You can enable Scale Center for five Standard (non-SysAdmin) users per org.

How: From Setup, in the Quick Find box, enter *Scale*, and then click **Scale Center**.

Plan and Test with Scale Test

Book a slot on your sandbox instance calendar and test at production peak load. Compare performance data from recent tests. Get in-app notifications and email confirmations about booking start times, end times, and cancellations.

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

Who: Scale Test is available for customers with a full copy sandbox in all Hyperforce regions except for Singapore.

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**.

Heroku

Use Heroku to build, deliver, monitor, and scale innovative apps fast. Build them using popular programming languages and frameworks without having to maintain the infrastructure.

To learn more about Heroku, see the [Heroku Dev Center](#).

IN THIS SECTION:

[Extend Your Customer 360 Experiences with Heroku](#)

Explore how Heroku provides the tools and infrastructure to meet your diverse business requirements. With flexible deployment options, auto-scaling capabilities, extensive add-ons, and reference apps, developers can innovate with performance and security in mind. Learn about the platform, understand the key use cases, and how to get started on Heroku.

Extend Your Customer 360 Experiences with Heroku

Explore how Heroku provides the tools and infrastructure to meet your diverse business requirements. With flexible deployment options, auto-scaling capabilities, extensive add-ons, and reference apps, developers can innovate with performance and security in mind. Learn about the platform, understand the key use cases, and how to get started on Heroku.

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

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

Salesforce Functions

Salesforce Functions is retiring on January 31, 2025. Learn about the retirement plan for Salesforce Functions.

IN THIS SECTION:

[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, deploy an alternative solution before your existing Order Term ends.

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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 (not available in all orgs), and all versions of the mobile app in Professional, Unlimited, and Developer editions.

SEE ALSO:

[Developer Doc: Salesforce Functions Release Notes](#)

AppExchange Partners

Search for packages by name, ID, or version number in the AppExchange Partner Console. Alt text is required for carousel images in AppExchange listings.

IN THIS SECTION:

[Find Your Packages Faster in the AppExchange Partner Console](#)

Narrow your search results and find your connected packages faster on the Partner Console's Solutions page. Search for a package by name or ID. Search for a package version by name, version ID, or version number.

[Improve Listing Accessibility with Alt Text In Carousel Images](#)

Ensure your AppExchange listings are accessible and search-engine friendly by adding descriptive alt text to all carousel images. Alt text helps low-vision users understand image content and can improve your listing's search engine rankings. Alt text is now required for new listings and highly recommended for existing listings. To meet this requirement, edit your listings in the AppExchange Partner Console.

Find Your Packages Faster in the AppExchange Partner Console

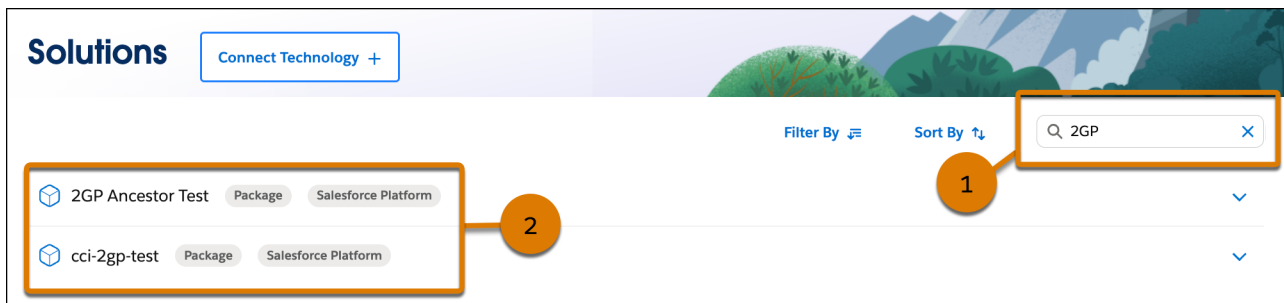
Narrow your search results and find your connected packages faster on the Partner Console's Solutions page. Search for a package by name or ID. Search for a package version by name, version ID, or version number.

Where: This change applies to the AppExchange Partner Console.

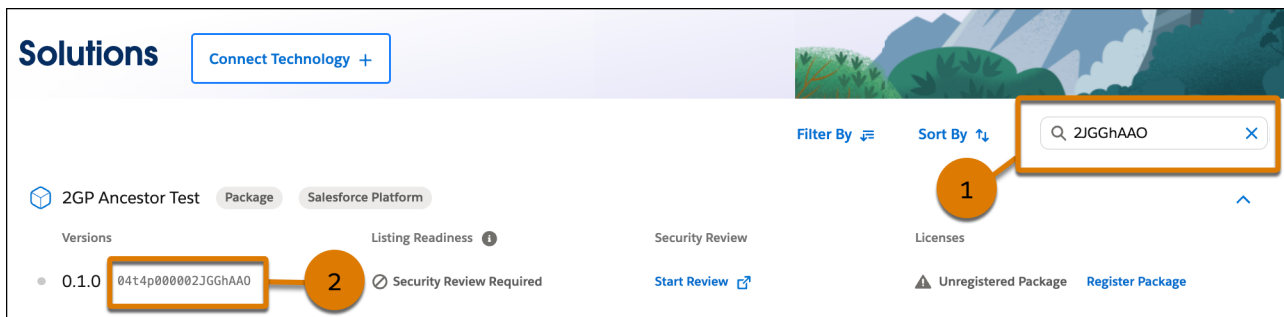
Who: To access the AppExchange Partner Console, you must have the Manage Listings permission in the Salesforce Partner Community.

How: Go to the Solutions page under Technologies in the Partner Console. All packages that are in orgs connected to the Console appear on the Solutions page.

To search by name, enter a partial or full package name or package version name in the search field (1). The results include all connected packages and package versions with names that match your search criteria (2).



To search by ID, enter a partial or full package ID or package version ID in the search field (1). The results include all connected packages and package versions with IDs that match your search criteria (2).



To search by version number, enter a partial or full package version number, such as 1.0.1, in the search field. The results include all connected package versions that match your search criteria.

SEE ALSO:

[ISVforce Guide: Launch the AppExchange Partner Console](#)

Improve Listing Accessibility with Alt Text In Carousel Images

Ensure your AppExchange listings are accessible and search-engine friendly by adding descriptive alt text to all carousel images. Alt text helps low-vision users understand image content and can improve your listing's search engine rankings. Alt text is now required for new listings and highly recommended for existing listings. To meet this requirement, edit your listings in the AppExchange Partner Console.

Who: To edit listings in the AppExchange Partner Console, you must have the Manage Listings permission in the Salesforce Partner Community.

Why: Salesforce is committed to making our enterprise applications accessible to all individuals, including users working with assistive devices, such as screen readers. Partners are encouraged to do the same. Alt text improves accessibility by describing what's shown in images to those who can't see them. It's read aloud to users by screen reader software and provides context and meaning for visual elements.

Alt text is also beneficial for search engine optimization (SEO). Google and other third-party search engines index alt text to understand what images depict. This can enhance how search engines comprehend your listing and lead to higher search rankings.

The carousel on an AppExchange listing contains up to 15 images and videos. It's the largest section on the listing page and the biggest opportunity to improve a listing's accessibility and SEO. Alt text for carousel images is now required for new listings and highly recommended for existing listings.

How: To add alt text to a carousel image, edit your listing in the AppExchange Partner Console. Go to Include Visuals (1) and enter alt text (2) for each carousel image. Describe each image in one sentence so that individuals who use screen readers can perceive what the image depicts.

Screenshots and Videos *

Customers are more likely to buy from listings with screenshots and videos. For inspiration, browse trending and popular listings to see effective examples of screenshots and videos.

< Back Add Image

Drag an image file here, or click the icon to browse your device.

Image Caption *

Enter a caption...

This field is required.

Image Alt Text ⓘ *

Enter alt text...

This field is required.

Save +

SEE ALSO:

[Launch the AppExchange Partner Console](#)

[External Link: Good Alt Text, Bad Alt Text — Making Your Content Perceivable](#)

[Trailhead: Writing for Web Accessibility](#)

Change Data Capture

Receive change events for more objects.

IN THIS SECTION:

[Receive Change Event Notifications for More Objects](#)

With Change Data Capture, you can now receive notifications of record changes for more objects.

Receive Change Event Notifications for More Objects

With Change Data Capture, you can now receive notifications of record changes for more objects.

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

How: Select the objects for which you want to get notifications on the Change Data Capture page in Setup or create a custom channel. You can now receive change events for these objects.

Industries

- Award
- IdentityDocument

- InsurancePolicy
- PersonEmployment
- AuthorNote
- CareObservationComponent
- CarePerformer
- CategorizedCareFeeAgreement
- ClinicalAlert
- ClinicalDetectedIssue
- ClinicalDetectedIssueDetail
- ClinicalEncounterFacility
- ClinicalEncounterIdentifier
- ClinicalEncounterProvider
- ClinicalEncounterReason
- ClinicalEncounterSvcRequest
- ClinicalServiceRequest
- ClinicalServiceRequestDetail
- DiagnosticSummaryDetail
- HealthConditionDetail
- Identifier
- PatientHealthReaction
- PatientImmunizationProtocol
- PersonLanguage
- PersonName
- ProblemDefinition
- ResearchStdyCndtStatusPrd

Security and Identity

- AuthorizationForm
- AuthorizationFormText
- CommSubscription
- CommSubscriptionChannelType
- EngagementChannelType

Service

- Survey
- SurveyPage
- SurveyQuestion
- SurveyQuestionChoice
- SurveyQuestionResponse
- SurveyResponse

- [SurveyVersion](#)

SEE ALSO:

[Change Data Capture Developer Guide](#)

Platform Events

Add real-time Event Monitoring events to a custom channel. Learn about planned feature retirements for standard-volume platform events and some Streaming API versions.

IN THIS SECTION:

[Add Real-Time Event Monitoring Events to a Custom Channel](#)

You can now receive multiple real-time event monitoring event types in one stream by adding them to a custom platform event channel. A subscriber can then subscribe to the channel to receive the various events.

[Standard-Volume Platform Events Are Being Retired](#)

Standard-volume platform events are legacy custom events and scheduled for retirement in Summer '25. As of Spring '19 (API version 45.0), you can define only high-volume platform events, and you can't define standard-volume platform events. If you still have legacy standard-volume events, we recommend that you replace them with high-volume platform events.

[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. If you're using one of these versions, upgrade to a recent Streaming API version or a version 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.

SEE ALSO:

[Apex System Namespace Changes: EventBus.publish Methods](#)

Add Real-Time Event Monitoring Events to a Custom Channel

You can now receive multiple real-time event monitoring event types in one stream by adding them to a custom platform event channel. A subscriber can then subscribe to the channel to receive the various events.

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

How: To specify that a channel holds event monitoring events, set the new `eventType` field in the PlatformEventChannel metadata type to the appropriate value. Use Metadata API or Tooling API to configure the channel with PlatformEventChannel, and add each event to the channel with PlatformEventChannelMember. You can add up to 3 custom event monitoring channels, and each channel can contain up to 10 members that reference real-time event monitoring events.

SEE ALSO:

[Salesforce Help: Real-Time Event Monitoring](#)

[Platform Events Developer Guide: Group Platform Events into One Stream with a Custom Channel](#)

Standard-Volume Platform Events Are Being Retired

Standard-volume platform events are legacy custom events and scheduled for retirement in Summer '25. As of Spring '19 (API version 45.0), you can define only high-volume platform events, and you can't define standard-volume platform events. If you still have legacy standard-volume events, we recommend that you replace them with high-volume platform events.

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

SEE ALSO:

[Knowledge Article: Migrate Standard-Volume Platform Events to High-Volume Platform Events Before Retirement](#)

Streaming API Versions 23.0 Through 36.0 Are Being Retired

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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

Manage your Pub/Sub API event subscriptions. Use real-time event monitoring events with event relays.

IN THIS SECTION:

[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.

[Keep the Pub/Sub API Publishing Stream Alive More Easily](#)

The timeout for keeping the publishing stream alive for the `PublishStream` RPC method increased from 60 seconds to 30 minutes. The timeout is counted from the last `PublishRequest` that the client sent or from the last `PublishResponse` that the server sent. The increased timeout simplifies your client implementation and reduces the amount of `PublishRequests` that the client sends to the server to keep the stream alive.

[Generate a Client Trace ID to Troubleshoot Non-Pub/Sub API Errors](#)

To help you troubleshoot errors that don't originate from the Pub/Sub API service and don't include an RPC ID, use the custom `x-client-trace-id` metadata header. Add `x-client-trace-id` metadata to every RPC request the client makes to Pub/Sub API as part of the authorization headers. Typical non-Pub/Sub API errors include network errors or errors returned from the data center infrastructure.

[Send Real-Time Event Monitoring Events to Amazon EventBridge with Event Relays](#)

You can now use real-time event monitoring events with event relays. Create a custom channel that references a real-time event monitoring event and stream the events to Amazon EventBridge, where you can store and process them. Previously, real-time event monitoring events weren't available for event relays.


[AWS Region Validation for Seamless Event Relay Execution](#)

The AWS region in your event relay named credential is now validated to be in upper case. When you create a new named credential, the creation fails if the supplied AWS region isn't in capital letters.

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.

Where: This change applies to Enterprise, Performance, Unlimited, and Developer editions. Pub/Sub API isn't available in 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](#).

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`. Each client has a unique subscription ID that can't be shared with other clients for the same Salesforce org. Subscriptions in Pub/Sub API are pull-based, so a client specifies 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:

[Pub/Sub API Developer Guide: Managed Event Subscriptions \(Beta\)](#)

[Metadata API Developer Guide: ManagedEventSubscription \(can be outdated or unavailable during release preview\)](#)

[Tooling API Developer Guide: ManagedEventSubscription \(can be outdated or unavailable during release preview\)](#)

Keep the Pub/Sub API Publishing Stream Alive More Easily

The timeout for keeping the publishing stream alive for the `PublishStream` RPC method increased from 60 seconds to 30 minutes. The timeout is counted from the last `PublishRequest` that the client sent or from the last `PublishResponse` that the server sent. The increased timeout simplifies your client implementation and reduces the amount of `PublishRequests` that the client sends to the server to keep the stream alive.

Where: This change applies to Enterprise, Performance, Unlimited, and Developer editions. Pub/Sub API isn't available in Government Cloud.

Generate a Client Trace ID to Troubleshoot Non-Pub/Sub API Errors

To help you troubleshoot errors that don't originate from the Pub/Sub API service and don't include an RPC ID, use the custom `x-client-trace-id` metadata header. Add `x-client-trace-id` metadata to every RPC request the client makes to Pub/Sub API as part of the authorization headers. Typical non-Pub/Sub API errors include network errors or errors returned from the data center infrastructure.

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SEE ALSO:

[Pub/Sub API Developer Guide: Generate a Client Trace ID to Troubleshoot Non-Pub/Sub API Errors](#)

Send Real-Time Event Monitoring Events to Amazon EventBridge with Event Relays

You can now use real-time event monitoring events with event relays. Create a custom channel that references a real-time event monitoring event and stream the events to Amazon EventBridge, where you can store and process them. Previously, real-time event monitoring events weren't available for event relays.

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

SEE ALSO:

[Salesforce Help: Real-Time Event Monitoring](#)

[Salesforce Help: Event Channels](#)

AWS Region Validation for Seamless Event Relay Execution

The AWS region in your event relay named credential is now validated to be in upper case. When you create a new named credential, the creation fails if the supplied AWS region isn't in capital letters.

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

How: The AWS URL uses the format `arn:aws:aws_region:aws_account_number`. Make sure that `aws_region` is in upper case. For example, use `US-WEST-2` and not `us-west-2` or a mix of cases.

To make sure your event relays run without issues caused by the specified AWS region, verify that all the named credentials include the AWS region in upper case. If the AWS region in an existing named credential isn't specified in upper case, edit the URL field of the named credential to change the AWS region to upper case. Then stop the event relay and run it again. If you don't restart the event relay, it can fail in some cases. See [Create a Named Credential for Event Relay Setup](#) in Salesforce Help.

New and Changed Items for Developers

Here is where you can find new and changed objects, calls, classes, components, commands, and more that help you customize Salesforce features.

IN THIS SECTION:

[Lightning Components: New and Changed Items](#)

Build UI easily with these new and changed resources.

[Apex: New and Changed Items](#)

These classes, enums, and interfaces are new or have changes.

[ConnectApi \(Connect in Apex\): New and Changed Classes and Enums](#)

Create custom experiences in Salesforce using Connect in Apex.

[API: New and Changed Items](#)

Access more data objects and metadata types in API version 61.0.

Lightning Components: New and Changed Items

Build UI easily with these new and changed resources.

IN THIS SECTION:

[New and Changed Lightning Web Components](#)

Build UI easily with these new and changed components.

[New and Changed Modules for Lightning Web Components](#)

Do more with Lightning web components by using modules.

[New and Changed Aura Components](#)

Build UI easily with these new and changed components.

New and Changed Lightning Web Components

Build UI easily with these new and changed components.

Changed Lightning Web Components

These components have changed.

lightning-combobox

These accessibility behaviors are new.

- You can now use the Tab or Enter key to select combobox elements.
- The string value of the combobox label is now used on the `aria-label` attribute on the input and button elements.

These attributes have changed.

- `spinner-active`—When this attribute is present, `role="presentation"` is replaced by `role="option"` on the wrapping `div` element for `lightning-spinner`.
- `required`—The error message reads out on every focus.

lightning-datatable

These accessibility behaviors are new.

- Unsaved cells have new colors to improve contrast.
- Assistive text is appended to unsaved cells in addition to contrasting color.
- Custom data types support keyboard navigation. Set `data-navigation="enable"` and `tab-index={internalTabIndex}` on custom elements.
- The `role="gridcell"` attribute is removed from all non-`td` elements.

These attributes are new.

- `aria-describedby`—An ID of an element that provides a description for the table element.
- `data-navigation`—Set value to `"enable"` on custom elements to enable keyboard navigation.
- `tabindex`—Set value to `{internalTabIndex}` on custom elements to enable keyboard navigation.

This attribute has changed.

- `aria-selected`—When you specify `hide-checkbox-column`, `aria-selected` is removed from all `tr` elements.

lightning-helptext

These accessibility behaviors are new.

- You can now dismiss the helptext tooltip on focus by pressing the Escape key.
- Moving the mouse into the helptext tooltip doesn't make the tooltip disappear.

lightning-input

These accessibility behaviors are new for all input elements.

- Set `role="status"` and `aria-live="polite"` to set error messages on input elements.

This attribute is new for all input elements.

- `aria-live`—Set `aria-live="polite"` to set input error messages.

These accessibility behaviors are new for `type="color"`.

- Hue slider now represents the updated value set from the input field.
- Screen readers now state "Current Color: None Selected" when no color is selected.
- When focused, hue selector is always visible.
- Screen readers now read out hexadecimal color codes instead of saturation and brightness values for hue sliders.

These attributes have changed for `type="color"`.

- `aria-disabled`—Sets `aria-disabled` on both `button` and `input` fields.
- `aria-keyshortcuts`—Is now passed to the `input` element.
- `role`—Can now set `role="status"` to set input error messages.

These accessibility behaviors are new for `type="datetime"`.

- `aria-attributes` has been updated to avoid multiple announcements of the current month.
- After date selection, focus now moves back to the `input` element.
- Setting `aria-disabled` passes `aria-disabled` to both date and time input fields.

These attributes are new for `type="datetime"`.

- `date-access-key`—Allows an access key to be set on date input fields.
- `time-access-key`—Allows an access key to be set on time input fields.

lightning-input-address

These attributes are new.

- `show-compact-address`—When this attribute is present, the street field is rendered as two separate inputs instead of a single textarea. To provide a label for the first street field, use `street-label`. To provide a label for the second street field, use `subpremise-label`.
- `subpremise`—The value for the subpremise field. The maximum length is 80 characters. Use this field for supplementary street information, such as the building number. Use this attribute with `show-compact-address`. The subpremise field doesn't require a value for form submission.
- `subpremise-label`—The label for the subpremise field, which is visible only when using `show-compact-address`.

- `subpremise-placeholder`—The placeholder for the subpremise field, which is visible only when using `show-compact-address`.

These attributes have changed.

- `street`—When using this attribute with `show-compact-address`, the street field is rendered as two separate inputs instead of a single textarea. The maximum length is 80 characters. To provide a value for the second street field, use `subpremise`.
- `show-address-lookup`—When using this attribute with `show-compact-address`, the first street field functions as the address lookup field.

lightning-progress-indicator

These accessibility behaviors are new.

- `role="presentation"` when `type="path"`.
- `role="listitem"` when `type="base"`.
- When using the `path` type, the unordered list renders with the `aria-labelledby` attribute. This attribute corresponds to an element that contains the description, "Stage:" followed by the current step label.

lightning-progress-step

These accessibility behaviors are new.

- This component now uses a `div` with `tabindex="0"` instead of a `button`.
- The `div` element doesn't render with both `aria-describedby` and `title` attributes to prevent screen readers from reading the steps twice.

This attribute has changed.

- `label`—A step with an error now appends "Error" to the label for assistive text.

lightning-select

These attributes are new.

- `aria-describedby`—The ID of an element or elements on the page that provides an accessible description for the select element.
- `aria-labelledby`—The ID of an element or elements on the page that provides an accessible name for the select element.


lightning-textarea

This attribute is new.

- `aria-labelledby`—The ID of an element or elements on the page that provides an accessible name for the textarea element.

lightning-tree

Data can now be added dynamically through the tree component whenever it's loaded by using the `key` and `expand` properties in the `change` event. When the tree node is expanded, the component requests the data for the expanded section. This dynamic loading improves performance when loading tree data.

-  **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:

[Component Library](#)

New and Changed Modules for Lightning Web Components

Do more with Lightning web components by using modules.

Changed Modules

These modules have new, changed, or deprecated wire adapters and JavaScript functions.

lightning/analyticsWaveApi

This module includes these new functions.

- `deleteWaveFolder(folderId)` —Deletes a specific CRM Analytics folder.
- `getWaveFolder(folderId, mobileOnlyFeaturedAssets, disableMru)` —Requests a CRM Analytics folder by ID, with optional parameters.
- `postWaveFolders(waveFolder)` —Create a CRM Analytics folder.
- `updatePartialWaveFolder(folderId, folder)` —Applies a patch or partial update a specific CRM Analytics folder.
- `updateWaveFolder(folderId, folder)` —Fully updates a specific CRM Analytics folder.

lightning/platformUtilityBarApi

Use the LWC Utility Bar API to work with the utilities on a utility bar. This module supports both Lightning Locker and Lightning Web Security. For more information, see [Control Utilities Within the Utility Bar](#).

lightning/platformWorkspaceApi

This module supports both Lightning Locker and Lightning Web Security. Previously, you had to enable Lightning Web Security before you could use this module.

experience/mobilePublisherConfigApi (Beta)

This module includes a new wire adapter.

- `getNavigationConfig`—Exposes properties that enable or disable the hamburger menu and back button on your Mobile Publisher for Experience Cloud LWR site.

For more information, see [Simplify Site Navigation on Mobile Publisher for LWR Sites \(Beta\)](#).

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:inputAddress

These attributes are new.

- `showCompactAddress`—When this attribute is present, the street field is rendered as two separate inputs instead of a single textarea. To provide a label for the first street field, use `streetLabel`. To provide a label for the second street field, use `subpremiseLabel`.
- `subpremise`—The value for the subpremise field. The maximum length is 80 characters. Use this field for supplementary street information, such as the building number. Use this attribute with `showCompactAddress`. The subpremise field doesn't require a value for form submission.
- `subpremiseLabel`—The label for the subpremise field, which is visible only when using `showCompactAddress`.
- `subpremisePlaceholder`—The placeholder for the subpremise field, which is visible only when using `showCompactAddress`.

This attribute has changed.

- `street`—When using this attribute with `showCompactAddress`, the street field is rendered as two separate inputs instead of a single textarea. The maximum length is 80 characters. To provide a value for the second street field, use `subpremise`.
- `showAddressLookup`—When using this attribute with `showCompactAddress`, the first street field functions as the address lookup field.

SEE ALSO:

[Component Library](#)

[Lightning Web Components Developer Guide](#)

[Lightning Aura Components Developer Guide](#)

Apex: New and Changed Items

These classes, enums, and interfaces are new or have changes.

For more information on these enhancements, see the [Apex Developer Guide](#) and the [Apex Reference Guide](#).

IN THIS SECTION:

[Auth Namespace](#)

The Auth namespace has these new or changed classes, methods, interfaces, enums, or exceptions.

[ConnectApi Namespace](#)

The ConnectApi namespace (Connect in Apex) has new or changed classes, methods, or enums.

[Context Namespace](#)

The `Context` namespace is used to manage the sharing and consumption of business application data by using Context Service. It has this new class and these methods.

[DataRetrieval Namespace](#)

The `DataRetrieval` namespace is used to store the record details and conversation transcripts between customers and agents. It has these new classes that are documented in the Revenue Lifecycle Management Developer Guide.

[DataSource Namespace](#)

The DataSource namespace has these new or changed classes, methods, interfaces, enums, or exceptions.

[DocGen Namespace](#)

The `IndustriesDocGen` namespace is used to manage document generation and permissions in Salesforce Industries. It has these new classes and methods.

[Id_verification Namespace](#)

The `id_verification` namespace has these new properties in existing classes.

[industriesDigitalLending Namespace](#)

The `industriesDigitalLending` namespace has these new classes.

[System Namespace](#)

The System namespace has these new or changed classes, methods, interfaces, enums, or exceptions.

[FormulaEval Namespace \(Beta\)](#)

The FormulaEval namespace has these new or changed classes, methods, interfaces, enums, or exceptions.

[Sfdc_enablement Namespace \(Developer Preview\)](#)

The new `sfdc_enablement` namespace is used for Enablement programs to create custom items and render them to the Salesforce Platform. It has these new classes and methods.

SEE ALSO:

[Apex: New Features](#)

Auth Namespace

The Auth namespace has these new or changed classes, methods, interfaces, enums, or exceptions.

New Classes

Extend the behavior of an external client app

These are highlights of the methods in the new `ExternalClientAppOAuthHandler` class. Use the `authorize` method to authorize the specified user to access the external client app. Use the `customAttributes` method to set new attributes for the specified user. Configure the `refresh` method for Salesforce to use during a refresh token exchange.

Get more test coverage by mocking HTTP callouts

Use the `setHttpMock(mock)` method in the new `Auth.HttpCalloutMockUtil` class.

New or Changed Methods in Existing Classes

Understand which `Auth.JWT` methods you can use depending on where the JWT came from

The `getValidityLength()`, `setValidityLength()`, `getNbfClockSkew()`, and `setNbfClockSkew()` methods in the `Auth.JWT` class now throw a `NoAccess` exception for JWTs generated using the `Auth.JWTUtil` class.

See more claims for JWTs generated using the `Auth.JWTUtil` class

The `getAdditionalClaims()` method in the `Auth.JWT` class now returns additional claims for JWTs generated using the `Auth.JWTUtil` class. Claims formatted as an inner list are converted to JSON strings, which you can then convert into a map.

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](#).

Context Namespace

The `Context` namespace is used to manage the sharing and consumption of business application data by using Context Service. It has this new class and these methods.

New Class

Manage the processes of a Context Service

These are highlights of the methods in the new `IndustriesContext` class. Use the `buildContext(input)` method to create a context. Use the `deleteContext(input)` method to delete a context. Use the `evictContextDefinition(input)` method to remove the details of the context definition from cache. Use the `getContext(input)` method to retrieve context details. Use the `getContextTranslation(input)` method to retrieve context mappings based on a target mapping ID. Use the `persistContext(input)` method to persist the current data or state of context. Use the `queryRecordStatus(input)` method to query the status of a record. Use the `queryTags(input)` method to query a context by using tags. Use the `updateContextAttributes(input)` method to update the attributes of a context.

DataRetrieval Namespace

The `DataRetrieval` namespace is used to store the record details and conversation transcripts between customers and agents. It has these new classes that are documented in the Revenue Lifecycle Management Developer Guide.

New Classes

Store the object name and record ID associated with an engagement between a customer and an agent

Use the `Engagement` class.

Store a list of multiple engagement records

Use the `Engagements` class.

Store engagement details for a single engagement record

Use the `EngagementRecordDetails` class.

Store a list of engagement details for multiple engagement records

Use the `EngagementRecordDetailsList` class.

Store details of an object associated with an engagement

Use the `ObjectDetailsRepresentation` class.

Store details of an individual record

Use the `RecordDetailsRepresentation` class.

Store field data of an individual record

Use the `FieldDetailsRepresentation` class.

Store transcripts of a single interaction session record

Use the `RecordTranscripts` class.

Store transcripts from multiple interaction sessions

Use the `RecordTranscriptsList` class.

Store conversation transcripts in written format

Use the `Transcript` class.

SEE ALSO:

[Industries Common Resources Developer Guide: DataRetrieval Namespace \(can be outdated or unavailable during release preview\)](#)

DataSource Namespace

The `DataSource` namespace has these new or changed classes, methods, interfaces, enums, or exceptions.

New or Changed Methods in Existing Classes

Map more external data types to Salesforce external objects using the Apex Connector Framework

Use the new `currency(name, length, decimalPlaces)`, `date(name)`, `email(name)`, `percent(name, length, decimalPlaces)`, and `phone(name)` methods in the `Column` class to create new columns on a `DataSource.Table`.

Changed Enums

Specify the new data types supported by the Apex Connector Framework

Use the new `CURRENCY_TYPE`, `DATE_TYPE`, `EMAIL_TYPE`, `PERCENT_TYPE`, and `PHONE_TYPE` `DataType` enum values.

DocGen Namespace

The `IndustriesDocGen` namespace is used to manage document generation and permissions in Salesforce Industries. It has these new classes and methods.

New Classes

Manage permissions and settings of document generation

These are highlights of the methods in the new `IndustriesDocGen` class. Use the `hasDocGenMetadataSetting(orgId, orgPreference)` method to enable or disable metadata settings. Use the `hasDocGenOrgPerm(orgId, orgPermission)` method to enable or disable permissions. Use the `hasMS365InetgrationSettingOrgPerm(orgId, orgPermission)` method to enable or disable Microsoft 365 integration permissions settings. Use the `hasOmniStudioOrgPerm(orgId, orgPermission)` method to enable or disable Omnistudio permission settings. Use the `isDesigner(orgId, userId, userPerm)` method to enable the user designer permissions. Use the `isRuntimeCCUser(orgId, userId, userPerm)` method to enable or disable runtime customer community user permissions. Use the `isRuntimeUser(orgId, userId, userPerm)` method to enable or disable runtime customer community user permissions.

Manage document generation processes

This is a highlight of the method in the new `DocumentGenerationProcess` class. Use the `Call(methodName, inputMap)` method to invoke input parameters for the document generation process.

Manage document templates

This is a highlight of the methods in the new `DocumentTemplate` class. Use the `Call(methodName, inputMap)` method to invoke input parameters for the document templates.

Id_verification Namespace

The `id_verification` namespace has these new properties in existing classes.

New Properties in Existing Classes

Get verification process record details, and specify the retry limit

Use the new `displayRecordFieldName`, `isRetryAllowedAfterLimit`, and `retryLimit` properties in the existing `ProcessDetail` class.

Store the formula to specify search filter, and specify whether user can manually enter identity verification details

Use the new `fieldValueFormula` and `isManualInput` properties in the existing `VerificationProcessField` class.

Get record ID and record name of the verified search object after a successful identity verification

Use the new `displayRecordId` and `displayRecordName` properties in the existing `VerifiedDetails` class.

industriesDigitalLending Namespace

The `industriesDigitalLending` namespace has these new classes.

New Classes**In the Digital Lending application intake process, invoke utility methods from OmniScripts**

Use the `DigitalLendingIntakeRecordsWrapper` class.

In the Digital Lending post intake within FlexCards, invoke utility methods from integration procedures

- Use the `DigitalLendingUtils` class.
- Use the `DigitalLendingPostIntakeRecordsWrapper` class.

In the Digital Lending FlexCards, invoke utility methods from integration procedures

- Use the `DigitalLendingProductsApi` class.
- Use the `PricingExecutionWrapper` class.

System Namespace

The `System` namespace has these new or changed classes, methods, interfaces, enums, or exceptions.

New or Changed Methods in Existing Classes**Use Apex cursors to traverse large result sets (beta)**

Use the new `Database.getCursor()` or `Database.getCursorWithBinds()` methods to create a cursor when a SOQL query is executed. Then, use the new `Cursor.fetch()` method, specifying the offset for generating results. To get Apex cursor limits, use these new methods in the `Limits` class.

- `getApexCursorRows`
- `getFetchCallsOnApexCursor`
- `getLimitApexCursorRows`
- `getLimitFetchCallsOnApexCursor`

Create an instance of the FormulaBuilder (beta)

Use the new `Formula.builder()` method.

Create mock test classes for Data Cloud objects

Extend the new `SoqlStubProvider` class and override the `SoqlStubProvider.handleSoqlQuery()` class method. Create and run DMO instances using either the `Test.createStubQueryRow()` or `Test.createStubQueryRows()` methods and the `Test.createSoqlStub()` method.

Perform better error handling when publishing sObjects that aren't platform events

The `EventBus.publish(event)` and `EventBus.publish(events)` methods now return a `System.UnexpectedException` when publishing sObjects that aren't platform events.

New Exceptions

Process System exceptions thrown by Apex cursors (beta)

Catch the new `System.FatalCursorException` and `System.TransientCursorException` exceptions. Transactions that fail with `System.TransientCursorException` can be retried.

FormulaEval Namespace (Beta)

The `FormulaEval` namespace has these new or changed classes, methods, interfaces, enums, or exceptions.

New or Changed Methods in Existing Classes

Get a list of field names as referenced in a formula

Use the new `getReferencedFields()` method.

Set the context type used with the `build()` method to `SObject` type

Use the new `withType(contextType)` overload.

Sfdc_enablement Namespace (Developer Preview)

The new `sfdc_enablement` namespace is used for Enablement programs to create custom items and render them to the Salesforce Platform. It has these new classes and methods.

New Classes

Define the exercise type for a custom item in an Enablement program

Use the `getName()`, `getLabel()`, `getIcon()`, and `getLearningItemType()` methods in the `sfdc_enablement.EnblProgramTaskDefSubCategoryType` class.

Define a learning item type for a custom item in an Enablement program

Use the `getName()`, `getLabel()`, `getComponentDef()`, and `getIcon()` methods in the `sfdc_enablement.LearningItemType` class.

Provide metadata information for a custom learning item type in an Enablement program

Use the `getType()`, `getEntityId()`, and `getLearningItemField()` methods in the `sfdc_enablement.LearningItemTypeHandler` class.

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*.

IN THIS SECTION:

[ConnectApi Rate Limit Changes for New Orgs](#)

To avoid potentially restrictive per user, per namespace, per hour `ConnectApi` rate limits, method calls from orgs created in Summer '24 and later count toward the per org, per 24-hour Salesforce Platform API rate limit. For these new orgs, only method calls that require Chatter are subject to the per user, per namespace, per hour rate limit.

[New Connect in Apex Classes](#)

These classes are new.

[Changed Connect in Apex Input Classes](#)

These input classes have changes.

[Changed Connect in Apex Output Classes](#)

These output classes have changes.

[Changed Connect in Apex Enums](#)

These enums have changes.

SEE ALSO:

[Connect REST API](#)

[Apex Reference Guide: ConnectApi Namespace](#)

[Connect REST API Developer Guide](#)

ConnectApi Rate Limit Changes for New Orgs

To avoid potentially restrictive per user, per namespace, per hour ConnectApi rate limits, method calls from orgs created in Summer '24 and later count toward the per org, per 24-hour Salesforce Platform API rate limit. For these new orgs, only method calls that require Chatter are subject to the per user, per namespace, per hour rate limit.

Where: This change applies to Lightning Experience, Salesforce Classic, and all versions of the Salesforce mobile app in all editions in all API versions.

SEE ALSO:

[Salesforce Developer Limits and Allocations Quick Reference : API Request Limits and Allocations](#)

New Connect in Apex Classes

These classes are new.

Commerce

This new method is in the `ConnectApi.OmnichannelInventoryService` class.

Update an existing inventory reservation in Omnichannel Inventory

- `ConnectApi.OmnichannelInventoryService.updateReservation`

New input class: `ConnectApi.OCIUpdateReservationInputRepresentation`

New output class: `ConnectApi.OCIUpdateReservationOutputRepresentation`

Salesforce CMS

This new method is in the `ConnectApi.ManagedContent` class.

Clone a piece of managed content

- `cloneManagedContentDocument(contentKeyOrId, ManagedContentCloneInputParam)`

New input class: `ConnectApi.ManagedContentCloneDocumentInput`

New output class: `ConnectApi.ManagedContentCloneDocument`

Changed Connect in Apex Input Classes

These input classes have changes.

Commerce

ConnectApi.CartInput

This input class has this new property.

- `customFields`—Array of sObjects and custom fields for the sObjects.

ConnectApi.CartItemInput

This input class has this new property.

- `customFields`—Array of sObjects and custom fields for the sObjects.

Salesforce CMS

ConnectApi.ManagedContentDocumentInput

This input class has this new property.

- `apiName`—API name of the managed content.

ConnectApi.ManagedContentPublishInput

This input class has this new property.

- `contextContentSpaceId`—ID of the context workspace.

ConnectApi.ManagedContentUnpublishInput

This input class has this new property.

- `contextContentSpaceId`—ID of the context workspace.

Changed Connect in Apex Output Classes

These output classes have changes.

Commerce

ConnectApi.AbstractCartItem

This output class has these new properties.

- `customFields`—Array of sObjects and viewable custom fields for the sObjects.

ConnectApi.CartItem

This output class has these new properties.

- `unitAdjustedPriceWithItemAdj`—Unit price, including both tier and item level discounts, for the item. This value is informational only and isn't used in pricing calculations.
- `unitItemAdjustmentAmount`—Item level adjustments made to the unit price for the item. This value is informational only and isn't used in pricing calculations.

ConnectApi.CartSummary

This output class has these new properties.

- `customFields`—Array of sObjects and viewable custom fields for the sObjects.

- `totalAmountWithItemAdjustment`—Total amount, including both tier and item level discounts but excluding cart level discounts, for all items in the cart. This value is informational only and isn't used in pricing calculations.
- `totalCartLevelAdjustmentAmount`—Total cart level discount amount used for the cart. This value is informational only and isn't used in pricing calculations.

Einstein

ConnectApi.EinsteinLLMGenerationItemOutput

This output class has this new property.

- `contentQualityRepresentation`—Specifies whether the generated response contains toxic language (`true`) or not (`false`).

Orchestration

ConnectApi.OrchestrationWorkItem

This output class has these new properties.

- `createdDate`—Date when the work item was created.
- `lastModifiedDate`—Date when the work item was last modified.

Salesforce CMS

ConnectApi.ManagedContentDocument

This output class has this new property.

- `apiName`—API name of the managed content.

ConnectApi.ManagedContentSpace

This output class has this new property.

- `apiName`—API name of the managed content space.

Changed Connect in Apex Enums

These enums have changes.

For information about these enums, see `ConnectApi` Enums in the *Apex Reference Guide*.

ConnectApi.CartTaxType

This enum has this new value.

- `Automatic`—Automatic taxation policy.

ConnectApi.ExternalCredentialParameterType

This enum has this new value.

- `AdditionalRefreshStatusCode`—4xx HTTP status codes that trigger Salesforce to refresh expired or invalid access tokens for named credentials, in addition to the standard 401 HTTP status code response.

ConnectApi.MaintenanceType

This enum has this new value.

- `MaintenanceAndAvailable`—Maintenance with availability.

ConnectApi.OrchestrationInstanceStatus

This enum has these new values.

- [Closed](#)
- [Discontinued](#)
- [Error](#)
- [Suspended](#)

API: New and Changed Items

Access more data objects and metadata types in API version 61.0.

IN THIS SECTION:

[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.

[Connect REST API](#)

Integrate mobile apps, intranet sites, and third-party web applications with Salesforce using Connect REST API.

[CRM Analytics REST API](#)

Retrieve datasets by type of dataflow and get folder associations using the CRM Analytics REST API. Make GET requests with the CRM Analytics Connect API collection.

[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.

[SOQL](#)

The updates to SOQL errors and functionality in this release could affect existing code that relies on old errors and functionality.

[Tooling API New and Changed Objects](#)

Access more metadata through these new and changed Tooling API objects.

[User Interface API](#)

Do more with lists, and work with more objects.

New and Changed Objects

Access more data through these new and changed standard objects.

Salesforce Overall

REMOVED: The CustomObjectUserLicenseMetrics object is removed

Removed in API version 59.0, CustomObjectUserLicenseMetrics has been deleted from the [Object Reference for the Salesforce Platform](#).

Commerce

Set the default order processing time and processing time unit for a location

Use the new `DefaultProcessingTime` and `DefaultProcessingTimeUnit` fields on the existing `Location` object. By default, field-level security hides these fields.

Set the default order pickup time for a location

Use the new `DefaultPickupTime` field on the existing `Location` object. By default, field-level security hides these fields.

Set the fulfilling business hours for a location

Use the new `FulfillingBusinessHours` field on the existing `Location` object. By default, field-level security hides these fields.

Add shipping services provided by a shipping carrier

Use the new `ShippingCarrierMethod` field on the existing `OrderDeliveryMethod` object.

Set earliest and last estimated delivery dates

Use the new `EarliestEstimatedDeliveryDate` and `LastEstimatedDeliveryDate` fields on the existing `OrderItem` and `OrderItemSummary` objects.

Set earliest and last estimated delivery times

Use the new `EarliestEstimatedDeliveryTime` and `LastEstimatedDeliveryTime` fields on the existing `OrderItem` and `OrderItemSummary` objects.

Create a unique reference ID for a delivery estimation

Use the new `DeliveryEstimationReference` field on the existing `OrderItem` and `OrderItemSummary` objects.

Set the time zone that estimated delivery times are based on

Use the new `DeliveryEstimationTimeZone` field on the existing `OrderItem` and `OrderItemSummary` objects.

Set the date when a fulfillment order becomes active and is closed

Use the new `ActiveDate` and `ClosedDate` fields on the existing `OrderItem` and `OrderItemSummary` objects.

View shipping carrier information

Use the new `ShippingCarrier` and `ShippingCarrierMethodId` objects.

BEHAVIOR CHANGE: The `PriceAdjustmentCauseId` is now nillable on the `CartItemPriceAdjustment` and `WebCartAdjustmentGroup` objects

You can now set the `PriceAdjustmentCauseId` field to null and empty the content.

View cart and item level adjustment amounts for a cart

Use the new `TotalCartLevelAdjAmount` and `TotalProductItemAdjAmount` fields on the existing `WebCart` object.

View unit price adjustment amounts for a cart item

Use the new `UnitAdjustedPriceWithItemAdj` and `UnitItemAdjustmentAmount` fields on the existing `CartItem` object.

Specify the state of the payment authorization reversal

Use the new value `Pending` in the existing `Status` field on the existing `PaymentAuthAdjustment` object.

View delivery estimation details for a delivery method

Use the new `TransitTimeMin`, `TransitTimeMax`, `TransitTimeUnit`, `ProcessTime`, and `ProcessTimeUnit` fields on the existing `CartDeliveryGroupMethod` object.

Specify the ID of the saved payment method record

Use the new `SavedPaymentMethodId` field on the existing `CardPaymentMethod` object. Introduced in API version 60.0, this field has been added to the Object Reference Guide.

Set shipping processing time and processing time unit

Use the new `ProcessTime` and `ProcessTimeUnit` fields on the existing `ShippingConfigurationSet` object.

BEHAVIOR CHANGE: The GatewayReference is now idLookup on the SavedPaymentMethod object

You can now use the `GatewayReference` field to specify a `SavedPaymentMethod` record in an upsert call.

Show shipping carrier information and set shipping transit times for a standard shipping rate.

Use the new `ShippingCarrierMethodId`, `TransitTimeMin`, `TransitTimeMax`, and `TransitTimeUnit` fields on the existing `StandardShippingRate` object.

Customization

Specify which active user access policy is applied when a user meets the criteria for multiple policies

Use the new `Order` field on the existing `UserAccessPolicy` object.

Improve Your Implementation with Salesforce Optimizer

Use the new `OrgMetric`, `OrgMetricScanResult`, and `OrgMetricScanSummary` objects. Introduced in API version 47.0, these fields are now added to the *Object Reference for the Salesforce Platform Guide*.

Development

View the scratch org snapshots that can be used to create another scratch org

Use the new `OrgSnapshot` standard object.

Determine the org snapshot from which a scratch org was created

Use the new `Snapshot` field of the `ActiveScratchOrg` and `ScratchOrgInfo` standard objects.

Einstein

Associate copilot actions to a copilot planner service

Use the `Plugin` field of `GenAIPlannerFunctionDef` to associate copilot actions with a copilot planner service.

Event Monitoring

Track network performance metrics

Use the new `UI Telemetry Resource Timing` and `UI Telemetry Navigation Timing` event types.

Experience Cloud

Add an API name when you create an enhanced CMS workspace

Use the new `ApiName` field on the existing `ManagedContentSpace` object.

Field Service

Apply a work capacity limit to an entire service territory

Use the new `IsSvcTerrOnlyLimit` field on the `WorkCapacityLimit` and `WorkCapacityUsage` objects.

Store historical data for AssignedResource records

Use the new `AssignedResourceHistory` associated object.

Connect a Quote to a Work Order

Use the new `RelatedWorkId` field on the `Quote` object. The field is automatically populated when a quote is created from a work order.

Determine How Mobile Workers Navigate to Destinations

Use the new `DestinationType` field on the `FieldServiceMobileSettings` object.

Set Up Actions Based on the Geolocation of Mobile Workers

Use the new `GeolocationBasedAction` object.

Marketing Cloud**Create a brief, which contains the purpose, key message, and target audience for a campaign.**

Use the new `Brief` object. This object is available only in Marketing Cloud Growth.

Associate a brief with a campaign.

Use the new `BriefId` field on the existing `Campaigns` object to add a brief to a campaign. This field is available only in Marketing Cloud Growth.

Mobile**Assign mobile security policies to a profile on Salesforce mobile apps with Enhanced Mobile App Security**

Use the new `MobileSecurityAssignment` object. Introduced in API version 54.0, this object has been added to the *Object Reference for the Salesforce Platform*.

BEHAVIOR CHANGE: Retrieve metadata about page layouts for the MobileSettingsAssignment object

Introduced in API version 51.0, information about the `describeLayout()` call has been added to the *Object Reference for the Salesforce Platform*.

Revenue**Capture successful order asset creation and order item relationships**

Use the new `IsSuccess` and `OrderItemId` fields on the existing `CreateAssetOrderDtlEvent` object.

Determine which billing schedules to include in an invoice batch run

Use the new `InvoiceBatchRunCriteria` object.

Track the date your invoices are posted

Use the new `PostedDate` field on the existing `Invoice` object.

Accurately track the status of your invoices

Use the new supported values `Draft`, `Draft In Progress`, and `Posting In Progress` in the existing `Status` field on the `Invoice` object.

Capture additional discount and partner details on your quote line items

Use the `DiscountAmount`, `PartnerDiscountPercent`, and `PartnerUnitPrice` fields on the existing `QuoteLineItem` object. Introduced in API version 59.0, these fields are now added to the *Object Reference for the Salesforce Platform Guide*.

Capture quantity, pricing, and tax details on your quote line items

Use the `EndQuantity`, `PriceWaterfallIdentifier`, `StartQuantity`, `TaxTreatmentId`, and `ValidationResult` fields on the existing `QuoteLineItem` object. Introduced in API version 60.0, these fields are now added to the *Object Reference for the Salesforce Platform Guide*.

Set the pricing source and renewal terms on contracts

Use the new `PricingSource`, `RenewalTerm2`, and `RenewalTermUnit` fields on the existing `Contract` object.

Accurately define the renewal terms in your contracts

Use the new supported values `Quarterly` and `Semi-Annual` in the existing `RenewalTermUnit` field on the `Contract` object.

Sales

Set the access on call collections

Use the new `AccessLevel` field on the existing `SharingRecordCollectionMember` object.

BEHAVIOR CHANGE: Identify roles for forecast types when user role hierarchy and territory hierarchy are in use

When querying forecast data for a user in forecasting objects, ensure that the filter criteria on the primary ID or `ForecastingTypeID` field are for the same hierarchy. If a filter isn't included, the role from the user role hierarchy is returned by default.

Reference team adjustment values that include a subordinate's owner and manager adjustment, but not the forecast manager's owner and manager adjustment

Use API names `SubordinateOverrideAmount1`, `SubordinateOverrideAmount2`, `SubordinateOverrideAmount3`, `SubordinateOverrideQuantity1`, `SubordinateOverrideQuantity2`, and `SubordinateOverrideQuantity3` in the `Formula` field on the existing `ForecastingColumnDefinition` object.

Add buyer profile information to contacts

Use the new `BuyerAttributes`, `DepartmentGroup`, and `TitleType` fields on the existing `Contact` object. To see these fields on a `Contact` record, add them to the record layout. The fields are available with all profiles except custom and minimum-access. To provide access, use field-level security in Object Manager.

Indicate whether Automatic Contact Creation created the contact

Use the new `ContactSource` field on the existing `Contact` object.

Let Einstein Coach generate feedback for sales reps from the transcription of a video call

Use the new `PromptTemplate` and `Type` fields on the `LearningPractice` object and the new `CallId` field on the `LearningItemSubmission` object.

Track more complex sales activity across multiple objects with composite goals for Enablement outcomes and milestones

Use the new `CompositeMilestoneType` field on the `EnblProgramTaskDefinition` object. Also, use the new `EnblProgramTaskMeasure` object.

Provide more transparency to Enablement users

Use the new `ContributingRecordCount` field on the `EnblProgramTaskProgress` object. Also, use the new `EnblPgmTaskMeasureProgress` object.

Support Enablement programs and measures in Metadata API

Use the new `EnablementProgramDefinition` object, the new `EnablementProgramDefinitionId` field on the `EnablementProgram` object, and the new `DeveloperName` field on the `EnblProgramSection` object. Also, use the `EnablementMeasureDefinition` object.

Support in-app guidance prompts and walkthroughs in Experience Cloud sites

Use the new `Experience` and `ExperienceContextId` fields on the `PromptVersion` object. Introduced in API version 60.0, these fields have been added to the *Object Reference for the Salesforce Platform*.

View customer segments (created through Data Cloud) in the Prospecting Center view

Use the new `MarketSegments` field on the existing `PipelineInspectionListView` object.

View a list of your accounts in the Prospecting Center view

Use the new supported value `MY_PROSPECTING_CENTER_ACCOUNTS` in the existing `ViewType` field on the `PipelineInspectionView` object.

Mark an account as important in the Intelligence views

Use the new `IsPriorityRecord` field on the existing `Account` object. Introduced in API version 60.0, this field has been added to the *Object Reference for the Salesforce Platform*.

Mark a contact or lead as important in the Intelligence views

Use the new `IsPriorityRecord` field on the existing Contact and Lead objects. Introduced in API version 59.0, these fields have been added to the *Object Reference for the Salesforce Platform*.

Create an action cadence step of platform screen flow type

Use the new `PlatformScreenFlow` picklist value on the `Type` field on the existing `ActionCadenceStepVariant` object. Introduced in API version 54.0, these fields have been added to the *Object Reference for the Salesforce Platform*.

Use new Sales Engagement email metrics for your reports

Use the new `AllEmailsNotDeliveredCount`, `DeliveredRecipientCount`, `DeliveredRecipientRate`, `HardBounceTrackableSends`, `HrdBncTrackableRecipientSends`, `LinkClickTrackableSends`, `LinkClkTrackableRecipientSends`, `OooTrackableRecipientSends`, `OpenTrackableRecipientSends`, `OpenTrackableSends`, `OutOfOfficeTrackableSends`, `RecipientReplies`, `RecipientSends`, `RecipientsHardBounced`, `RecipientsOutOfOffice`, `RecipientsSoftBounced`, `ReplyTrackableRecipientSends`, `ReplyTrackableSends`, `SftBncTrackableRecipientSends`, `SoftBounceTrackableSends`, `SomeEmailsDeliveredCount`, `SomeEmailsDeliveredRate`, `TrackableRecipientSendHrdBncRt`, `TrackableRecipientSendOooRate`, `TrackableRecipientSendReplyRt`, `TrackableRecipientSendSftBncRt`, `TrackableSendHardBounceRate`, `TrackableSendLinkClickRate`, `TrackableSendOpenRate`, `TrackableSendOutOfOfficeRate`, `TrackableSendReplyRate`, and `TrackableSendSoftBounceRate` fields on the existing `ActionCdncStpMonthlyMetric` object. Introduced in API version 54.0, these fields have been added to the *Object Reference for the Salesforce Platform*.

Retrieve the history of field values changes for tracked objects and fields

Use the new `ActivityFieldHistory` object. Introduced in API version 55.0, these fields have been added to the *Object Reference for the Salesforce Platform*.

Assign labels to records to help organize, track, and find the records

Use the new `UserDefinedLabel` and `UserDefinedLabelAssignment` objects.

Salesforce Flow**View the logging data for a FlowOrchestrationInstance, FlowOrchestrationStageInstance, or FlowOrchestrationStepInstance**

Use the new `FlowOrchestrationLog` object.

Obtain more information about a flow

Use the new `ActiveVersionId`, `ApiVersion`, `Builder`, `FlowType`, `IsLightningAppEnabled`, `IsOverridable`, `IsTemplate`, `ManageableState`, `NamespacePrefix`, `OverriddenById`, `OverriddenFlowId`, `SourceTemplateId`, and `TriggerObjectOrEventLabel` fields on the existing `FlowRecord` object.

Obtain more information about a flow version

Use the new `ApiVersion`, `Builder`, `Description`, `FlowType`, `IsOverridable`, `IsTemplate`, `OverriddenById`, `OverriddenFlowId`, `RunInMode`, `SourceTemplateId`, `Status`, and `TriggerObjectOrEventLabel` fields on the existing `FlowRecordVersion` object.

Salesforce Scheduler**Relate the appointment category to a shift**

Use the new `AppointmentCategoryId` field on the `Shift` object.

Set the maximum number of attendees for a group service appointment in a shift

Use the new `AttendeeLimit` field on the `ShiftWorkTopic` object.

Set the maximum number of attendees for a group service appointment for a work type or work type group

Use the new `AttendeeLimit` field on the `WorkType` object.

Specify the users who can access the group service appointment

Use the new `GroupAppointmentAccessType` field on the `ServiceAppointment` object.

Determine whether an attendee has attended the service appointment

Use the new `HasAttended` field on the `ServiceAppointmentAttendee` object.

Determine whether the appointment category of the service appointment is of type group

Use the new `IsGroup` field on the `AppointmentCategory` object. The field also determines whether work types and shifts support the group category.

REMOVED: The Attended value in the Status field is removed

Instead, use the new `Enrolled` and `Unenrolled` values on the `ServiceAppointmentAttendee` object.

Security and Identity**Review blocked redirections and resource requests**

Use the new `BrowserPolicyViolation` object.

REMOVED: The CspViolation object is removed

To view resource requests that are blocked due to your content security policy (CSP) directives, use the `BrowserPolicyViolation` object instead.

Configure a custom one-time password delivery handler for Experience Cloud site identity verification use cases

Use the new `CustomOtpDeliveryHandlerId` field (beta) on the existing `NetworkAuthApiSettings` 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](#).

Use the login history to track the origin IP address for logins with one or more proxies

Use the new `ForwardedForIp` field on the existing `LoginHistory` object.

Use event monitoring to track the origin IP address for logins with one or more proxies

Use the new `FORWARDED_FOR_IP` field on the existing `Login` event type.

Customize the welcome email that users receive during passwordless registration

Use the new `PwdlessRegEmailTemplateId` field on the existing `Network` object.

BEHAVIOR CHANGE: Session revocation is now tracked in the Logout event type

The `Logout` event type now tracks when a user revokes access to a connected app, when a user calls the Salesforce revocation endpoint, and when Salesforce disables a connected app.

Store the configuration for a custom metric within Security Center

Use the new `TenantSecurityCustomMetricSetup` (Beta) 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](#).

Store custom metric data within Security Center

Use the new `TenantSecurityCustomMetricStat` (Beta) 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](#).

Track the fields encrypted under your Shield Platform Encryption policy

Use the new `TenantSecurityEncryptedField` object.

Surface event data stored in standard objects

Use the new event log objects (beta): `AnalyticsChangeEventLog`, `AnalyticsDownloadEventLog`, `AnalyticsInteractEventLog`, `AnalyticsPerfEventLog`, `ApexCalloutEventLog`, `ApexExecutionEventLog`, `ApexExtlCalloutEventLog`, `ApexRestApiEventLog`, `ApexSoapApiEventLog`, `ApexTriggerEventLog`, `ApexUnexpectedExcpEventLog`, `ApiTotalUsageEventLog`, `AsyncReportRunEventLog`, `AuraRequestEventLog`, `BulkApiEventLog`, `BulkApi2EventLog`, `ConcurApexLimitEventLog`, `FlowNavMetricEventLog`, `KnowledgeArticleEventLog`, `LightningLoggerEventLog`, `LightningPageViewEventLog`, `LoginEventLog`, `LoginAsEventLog`, `ReportEventLog`, `RestApiEventLog`, `SearchEventLog`, `SearchClickEventLog`, `SoapApiEventLog`, `TransactionSecurityEventLog`, `UriEventLog`, and `VisualforceRequestEventLog`.



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](#).

Review an OAuth custom scope's namespace

Use the new `NamespacePrefix` field on the existing `OAuthCustomScope` object.

Enable Embedded Login

Use the new `OptionsEmbeddedLoginEnabled` field on the existing `Network` object.

Monitor login activity from a wider variety of OAuth login flows

Use the supported values `OAuth OTP Login`, `OAuth Refresh Token`, `OAuth Refresh Token for Hybrid Apps`, `OAuth Token Exchange`, `OAuth Token Exchange for Hybrid Apps`, `OAuth User-Agent for Hybrid Apps`, and `OAuth Web Server for Hybrid Apps` in the `LoginSubType` field on the `LoginHistory` object. Available in API version 57.0 and later, these values have been added to the *Object Reference for the Salesforce Platform*.

Service**Track how enhanced messaging sessions end**

Use the new `EndedByType` field on the existing `MessagingSession` object.

Track the preferred language of messaging users

Use the new `EndUserLanguage` field on the existing `MessagingSession` object.

View whether a messaging channel is standard or enhanced

Use the new `PlatformType` field on the existing `MessagingChannel` object. This field was previously available only in the UI.

View details about a connector to a third-party knowledge source for Unified Knowledge

Use the existing `ExtKnowledgeConnector` object.

See which customer the Service Catalog request was made for

Use the new `TargetCustomerId` field on the existing `SvcCatalogRequest` object.

Indicate whether the service catalog item can be accessed by guest users

Use the new `IsGuestAccessible` field on the existing `SvcCatalogItemDef` object.

Indicate whether the service catalog item is available to all customers

Use the new `IsAvailableToAllCustomers` field on the existing `SvcCatalogItemDef` object.

See the content asset ID of the service catalog item image

Use the new `ImageReference` field, derived from the `ImageId` field, on the existing `SvcCatalogItemDef` object.

See details on actions completed by the Service Setup Assistant

Use the new `TaskAction` and `TaskAction` fields on the existing `ServiceSetupProvisioning` object.

Your Account**View contract information related to your organization's Salesforce subscription**

Use the new `SalesforceContract` virtual object.

View invoice information related to your organization's Salesforce contracts

Use the new SalesforceInvoice virtual object.

View payment information related to your organization's Salesforce invoices

Use the new SalesforcePayment virtual object.

View quote information related to your organization's Salesforce contracts

Use the new SalesforceQuote virtual object.

New and Changed Data Model Objects

Access more data groupings through these new and changed data model objects (DMOs).

Data Cloud

Reference unstructured data in Data Cloud

For unstructured data, the data resides in files in an external blob store, such as Amazon S3. The unstructured data is referenced directly in Data Cloud by an unstructured data lake object (UDLO).

Consume unstructured data in Salesforce

Workloads in Data Cloud that consume unstructured data do so through unstructured data model objects (UDMOs). When you create a UDLO, you map it to a UDMO.

Store chunked object fields in Data Cloud

When you create a search index configuration, Data Cloud creates a chunk data model object (CDMO). Each field that you supply a chunking strategy to is stored in the chunk data model object, from which Data Cloud references the chunked data.

Store generated vector embeddings in Data Cloud

When you create a search index configuration, Data Cloud creates a vector data model object (VDMO). This object stores generated vector embeddings and a unique identifier for each chunk in Data Cloud.

Search

View search-related data on articles, queries, and interactions, such as clicks and hovers

Use the new Search Results DMO, Search Queries DMO, and Search Interactions DMO.

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.

Mobile

Store data about users' email activity in a Salesforce mobile app with Enhanced Mobile App Security

Use the new MobileEmailEventStore object, which corresponds to the MobileEmailEvent platform event. Introduced in API version 48.0, this object has been added to the *Platform Events Developer Guide*.

Store data about Enhanced Mobile App Security policy events in a Salesforce mobile app with Enhanced Mobile App Security

Use the new MobileEnfPolicyEventStore object, which stores data for MobileEnforcedPolicyEvent. Introduced in API version 48.0, this object has been added to the *Platform Events Developer Guide*.

Store data about users' screenshots in a Salesforce mobile app with Enhanced Mobile App Security

Use the new MobileScreenshotEventStore object, which stores data for MobileScreenshotEvent. Introduced in API version 48.0, this object has been added to the *Platform Events Developer Guide*.

Store data about users' phone calls and text messages in a Salesforce mobile app with Enhanced Mobile App Security

Use the new `MobileTelephonyEventStore` object, which stores data for `MobileTelephonyEvent`. Introduced in API version 48.0, this object has been added to the *Platform Events Developer Guide*.

Security, Identity, and Privacy**Track the origin IP address for logins with multiple proxies**

Use the new `ForwardedForIp` field on `LoginEvent` and `LoginEventStream` to see the origin IP address for logins that redirect users with multiple HTTP proxies.

Identify the Experience Cloud site related to an insecure external asset

Use the new `NETWORK_ID` field on the Insecure External Assets event type.

Determine the CSP HTTP header that identified an insecure external asset

Use the new `DISPOSITION` field on the Insecure External Assets event type.

View the message for the error blocking the download request, if any.

Use the new `DOWNLOAD_ERROR` field on the Wave Download event type.

Connect REST API

Integrate mobile apps, intranet sites, and third-party web applications with Salesforce using Connect REST API.

IN THIS SECTION:[Connect REST API Rate Limit Changes for New Orgs](#)

To avoid potentially restrictive per user, per application, per hour Connect REST API rate limits, requests from orgs created in Summer '24 and later count toward the per org, per 24-hour Salesforce Platform API rate limit. For these new orgs, only requests that require Chatter are subject to the per user, per application, per hour rate limit.

[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](#)

Connect REST API Rate Limit Changes for New Orgs

To avoid potentially restrictive per user, per application, per hour Connect REST API rate limits, requests from orgs created in Summer '24 and later count toward the per org, per 24-hour Salesforce Platform API rate limit. For these new orgs, only requests that require Chatter are subject to the per user, per application, per hour rate limit.

Where: This change applies to Lightning Experience, Salesforce Classic, and all versions of the Salesforce mobile app in all editions in all API versions.

SEE ALSO:

[Salesforce Developer Limits and Allocations Quick Reference : API Request Limits and Allocations](#)

New and Changed Connect REST API Resources

These resources are new or have changes.

Commerce

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.

Add a coupon to a checkout

Make a POST request to the new `/commerce/webstores/{webstoreId}/checkouts/{activeOrCheckoutId}/coupons` resource.

New request body: Checkout Coupon Input

New response body: Checkout Coupon

Remove a coupon from a checkout

Make a DELETE request to the new `/commerce/webstores/{webstoreId}/checkouts/{activeOrCheckoutId}/coupons/{cartCouponId}` resource.

Add a product to a store and associate it with specified category and media records and the store's default records

Make a POST request to the new `/commerce/management/webstore/{webstoreId}/composite-products` resource.

Update a product record to associate it with specified category and media records

Make a PUT request to the new `/commerce/management/webstore/{webstoreId}/composite-products/{productId}` resource.

Retrieve product media records in order summaries

Make a GET request to the existing `/commerce/webstores/{webstoreId}/order-summaries` resource.

New request parameter: `includeProducts`

Update an existing reservation in Omnichannel Inventory

Make a POST request to the new `/commerce/oci/reservation/actions/update/` resource.

New request body: Update Reservation Input

New response body: Update Reservation

Data Cloud

Create a web or mobile connection

Make a POST request to the new `/ssot/connections` resource. This resource is available starting in May 2024.

New request body: Connection Input

New response body: Connection Output

Get a web or mobile connection

Make a GET request to the new `/ssot/connections/connectionId` resource. This resource is available starting in May 2024.

New response body: Connection Output

Get a list of web or mobile connections

Make a GET request to the new `/ssot/connections` resource. This resource is available starting in May 2024.

New response body: Connection Collection Output

Delete a web or mobile connection

Make a DELETE request to the new `/ssot/connections/connectionId` resource. This resource is available starting in May 2024.

Get a list of activation records from Audience data model objects (DMOs)

Make a GET request to the new `/ssot/activations/activationId/data` resource. This resource is available starting in June 2024.

New response body: Audience DMO Collection Output

Delete an activation

Make a DELETE request to the new `/ssot/activations/activationId` resource. This resource is available starting in July 2024.

Experience Cloud Sites

Get a preview URL for an Experience Cloud site page

Make a GET request to the new `/connect/communities/communityId/preview-url/pages/pageApiName` resource.

New response body: Community Preview URL

List Views

Share a list view with a role under Roles and Internal Subordinates

Make a GET request to the `/connect/list-share-recipients?shareType=RoleAndSubordinatesInternal` resource.

`shareType=RoleAndInternalSubordinates` is no longer valid.

Network Data Category

Update the network data category record in an Experience Cloud site

Make a GET request to the new `/connect/communities/communityId/network-data-category/networkDataCategoryId` resource.

Retrieve child categories of a network data category in an Experience Cloud site

Make a GET request to the new `/connect/communities/communityId/network-data-category/networkDataCategoryId/child-category` resource.

New response body: Network Data Category Collection

Retrieve the hierarchy of the network data categories in an Experience Cloud site

Make a GET request to the new

`/connect/communities/communityId/network-data-category/networkDataCategoryId/parent-path` resource.

New response body: Network Data Category Collection

Salesforce CMS

Clone a piece of managed content

Make a POST request to the new `/connect/cms/contents/contentKeyOrId/clone` resource.

New request body: Managed Content Document Clone Input

New response body: Managed Content Document Clone

Get folder hierarchy information

Make a GET request to the existing `/connect/cms/folders/folderId` resource.

New request parameter: `contextContentSpaceId`

SEE ALSO:

[Connect REST API Developer Guide: B2B and D2C Commerce Resources](#)

Changed Connect REST API Request Bodies

These request bodies have changes.

Commerce

Cart Input

This request body has this new property.

- `customFields`—Array of sObjects and custom fields for the sObjects.

Cart Item Input

This request body has this new property.

- `customFields`—Array of sObjects and custom fields for the sObjects.

Salesforce CMS

Managed Content Input

This request body has this new property.

- `apiName`—API name of the managed content.

Managed Content Publish Input

This request body has this new property.

- `contextContentSpaceId`—ID of the context workspace.

Managed Content Unpublish Input

This request body has this new property.

- `contextContentSpaceId`—ID of the context workspace.

Changed Connect REST API Response Bodies

These response bodies have changes.

Commerce

Cart Item

This response body has these new properties.

- `customFields`—Array of `sObjects` and viewable custom fields for the `sObjects`.
- `unitAdjustedPriceWithItemAdj`—Unit price, including both tier and item level discounts, for the item. This value is informational only and isn't used in pricing calculations.
- `unitItemAdjustmentAmount`—Item level adjustments made to the unit price for the item. This value is informational only and isn't used in pricing calculations.

Cart Summary

This response body has these new properties.

- `customFields`—Array of `sObjects` and viewable custom fields for the `sObjects`.
- `totalAmountWithItemAdjustment`—Total amount, including both tier and item level discounts but excluding cart level discounts, for all items in the cart. This value is informational only and isn't used in pricing calculations.
- `totalCartLevelAdjustmentAmount`—Total cart level discount amount for the cart. This value is informational only and isn't used in pricing calculations.

Delivery Method

This response body has these new properties.

- `earliestEstimatedDeliveryTime`—Earliest estimated delivery date and time for the delivery in ISO 8601 format. Determined by the time at checkout, plus `processTime`, plus `transitTimeMin`.
- `latestEstimatedDeliveryTime`—Latest estimated delivery date and time for the delivery in ISO 8601 format. Determined by the time at checkout, plus `processTime`, plus `transitTimeMax`.
- `processTime`—Merchant-specified process time for the delivery. Process time includes the time between when an order is placed and when the shipment is given to the shipping carrier.
- `processTimeUnit`—Unit of time used to define `processTime`.
- `transitTimeMax`—Maximum estimate of transit time for the delivery. Transit time includes the time between when a shipping carrier receives a shipment and when the shipment arrives at the delivery address.
- `transitTimeMin`—Minimum estimate of transit time for the delivery. Transit time includes the time between when a shipping carrier receives a shipment and when the shipment arrives at the delivery address.
- `transitTimeUnit`—Unit of time used to define `transitTimeMax` and `transitTimeMin`.

Einstein

Einstein LLM Generation Item

This response body has this new property.

- `contentQualityRepresentation`—Specifies whether the generated response contains toxic language (`true`) or not (`false`).

Flow Orchestration

Orchestration Work Item

This response body has these new properties.

- `createdDate`—Date when the work item was created.
- `lastModifiedDate`—Date when the work item was last modified.

Network Data Category

Lightning Knowledge Article Version Collection

This response body has this new property.

- `baseUrl`—Lightning Web Runtime (LWR) base URL for the Knowledge Article Detail page.

Network Data Category

This response body has these new properties.

- `categoryGroupName`—Name of the network data category group.
- `categoryOrGroupLabel`—Label of the data category or data category group.
- `relativeUrl`—Relative URL of the network data category.

Service Catalog Item Collection

This response body has this new property.

- `baseUrl`—Lightning Web Runtime (LWR) base URL for the Knowledge Article Detail page.

Service Catalog Item

This response body has this changed property.

- `imageID`—Image URL of the service catalog item. This property was previously named `imageUrl`.

Salesforce CMS

Managed Content Document

This response body has this new property.

- `apiName`—API name of the managed content.

Managed Content Space

This response body has this new property.

- `apiName`—API name of the managed content space.

Managed Content Space Folder Detail

This response body has these new properties.

- `folderType`—Type of folder.
- `isShared`—Specifies whether the folder is shared with another workspace (`true`) or not (`false`).

CRM Analytics REST API

Retrieve datasets by type of dataflow and get folder associations using the CRM Analytics REST API. Make GET requests with the CRM Analytics Connect API collection.

IN THIS SECTION:

[New and Changed CRM Analytics REST API Resources](#)

These resources are new or have changes.

[Changed CRM Analytics REST API Request Bodies](#)

These request bodies have changes.

[Changed CRM Analytics REST API Response Bodies](#)

These response bodies have changes.

New and Changed CRM Analytics REST API Resources

These resources are new or have changes.

Get a collection of datasets filtered by dataflow type

Make a GET request to the `/wave/datasets` resource.

New request parameters: `typeOfDataflow`

Get a collection of folder associations

Make a GET request to the new `/wave/folders/folderId/associations` resource.

Request parameters: `assetTypes`

Response body includes new App Template Association Collection and App Template Association representations.

REMOVED `/wave/data-conversions` resource and the supporting request and response bodies

This resource isn't supported for public use and has been removed from the documentation. Conversions from Data Cloud data model objects to Analytics datasets are done internally by the Salesforce Platform via the Intelligent App runtime framework.

Changed CRM Analytics REST API Request Bodies

These request bodies have changes.

Aggregate Flex Query Step Input

The request body has this new property.

- `dataspace`—The dataspace name for a Data Cloud object.

Cdp Step Input

The request body has this new property.

- `dataspace`—The dataspace name for a Data Cloud object.

Changed CRM Analytics REST API Response Bodies

These response bodies have changes.

Aggregate Flex Step

The response body has this new property.

- `dataspace`—The dataspace name for a Data Cloud object.

Cdp Step

The response body has this new property.

- `dataspace`—The dataspace name for a Data Cloud object.

Wave Features

The response body has this new property.

- `canWriteToDataCloud`—Indicates whether Analytics data can write to Data Cloud data model objects (`true`) or not (`false`).

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:

Call an Integration Procedure from a Salesforce Flow

Use the new `vlocity_cmt__MediaIntegrationProcedureInvocable` action.

The following Data Cloud action is added:

Deploy data kit components to a target org using a flow that invokes an invocable action

Use the new `deployDataKitComponents` invocable action in a flow.

Transform an AI Natural Language Processing (NLP) result created using Einstein generative AI into an apex object record

Use the new `processTransformNlpActionResult` invocable action in a flow.

Process data using generative AI to summarize text, extract key phrases, analyze sentiment, and unlock valuable insights.

Use the new `processDataUsingGenAi` invocable action in a flow.

For more information on invocable actions, see the [Actions Developer Guide](#).

Metadata API

Access more metadata through these new and changed metadata types.

Salesforce Overall

Enable the LWC Stacked Modals release update

Use the new `enableStackedModalManagerEnabled` field on the existing `LightningExperienceSettings` metadata type.

See [Enable LWC Stacked Modals \(Release Update\)](#).

Analytics

Enable new Lightning Experience dashboard change owner feature

To enable the dashboard change owner feature, use the `enableDashboardChangeOwnerPref` field on the existing `AnalyticsSettings` metadata type.

Customization

Migrate Search Manager configurations between Salesforce orgs

Use the new `SearchCustomization` metadata type to migrate Search Manager configurations.

Configure the search index in your Salesforce org

Use the new `SearchOrgWideObjectConfig` metadata type to configure the org-wide search index.

Specify which active user access policy is applied when a user meets the criteria for multiple policies

Use the new `order` field on the existing `UserAccessPolicy` metadata type.

BEHAVIOR CHANGE: Only the properties of certain fields are retrieved or deployed on Data Cloud objects

The `CustomField` attributes you can retrieve or deploy on a Data Cloud object depend on the custom field data type. Data Cloud objects support a subset of data types. For more information, see [CustomField](#) in the Metadata API Developer Guide.

Translate the description of custom applications

Use the `description` field on the existing `CustomApplicationTranslation` metadata type.

Development

Add Real-Time Event Monitoring events to a custom channel

Create a channel that can hold Real-Time Event Monitoring events by setting the new `eventType` field on the `PlatformEventChannel` metadata type.

Enable logging for custom Lightning web components

Use the new `enableLightningLoggerEvents` field on the existing `EventSettings` metadata type. Requires Salesforce Shield or Salesforce Event Monitoring add-on subscriptions.

Enable Scratch Orgs for Snapshots

Use the new `enableScratchOrgSnapshotPref` field on the `DevHubSettings` metadata type. This field enables Scratch Orgs for Snapshots in your Dev Hub org so you can create snapshots of a fully configured scratch org. A snapshot is a point-in-time copy of a scratch org that you can use to create additional scratch orgs.

Einstein

Manage Einstein Copilot actions and customize the planner service

Use the new `GenAiFunction` and `GenAiPlanner` types.

Learn that a Field Used in a Prediction is the Interaction's DateTime

Use the `SourceDate` value for the `type` enumeration on the existing `MLFieldType` metadata type. Introduced in API version 54.0, this value has been added to the *Metadata API Developer Guide*.

Mobile

Assign mobile security policies to a profile on Salesforce mobile apps with Enhanced Mobile App Security

Use the new `MobileSecurityAssignment` metadata type. Introduced in API version 54.0, this type has been added to the *Metadata API Developer Guide*.

Configure mobile security policies on Salesforce mobile apps with Enhanced Mobile App Security

Use the new `MobileSecurityPolicy` metadata type. Introduced in API version 53.0, this type has been added to the *Metadata API Developer Guide*.

Configure authentication server certificate pins on Salesforce mobile apps with Enhanced Mobile App Security

Use the new `MobSecurityCertPinConfig` metadata type. Introduced in API version 53.0, this type has been added to the *Metadata API Developer Guide*.

REMOVED: The `ChatterMobileSettings` and `TouchMobileSettings` metadata subtypes on the existing `MobileSettings` metadata type have been removed.

These metadata subtypes were removed in API version 46.0. The corresponding `chatterMobile` and `touchMobile` fields on the existing `MobileSettings` metadata type were also removed in API version 46.0.

REMOVED: The `enableLightningOnMobile` field on the existing `MobileSettings` metadata type has been removed.

This field was removed in API version 48.0.

REMOVED: The `enableNewSalesforceMobileAppForTablet` and `enableNewSalesforceMobileAppForTabletWideScreen` fields on the existing `MobileSettings` metadata type have been removed.

These fields were removed in API version 56.0.

Financial Services Cloud

Enable or disable Financial Account Management Standard Objects setting

Use the new `enableFinancialAccountMgmt` field on the existing `IndustriesSettings` metadata type to indicate the status of the Financial Account Management Standard Objects setting for your org.

Marketing Cloud Growth

Retrieve and deploy marketing workspaces

Use the existing `DigitalExperienceBundle` type to retrieve and deploy forms and referenced images in marketing workspaces.

Share content across marketing workspaces

Use the new `DigitalExperienceFolderShare` subtype on the existing `DigitalExperienceBundle` type to share source marketing workspaces with target marketing workspaces.

Sales

Enable or disable Automatic Contact Creation, Automatic Contact Enhancements, and Buyer Relationship Map features

Use the `autoContactCreationPref`, `autoContactEnrichmentPref`, and `relationshipGraphPref` fields on the existing `EACSettings` metadata type.

Retrieve Enablement programs and measures from a sandbox and deploy them to production with change sets and Salesforce CLI

Use the new `EnablementProgramDefinition` and `EnablementMeasureDefinition` metadata types.

Deploy forecast types with groups, and identify group values

Use the new `forecastingGroupDeveloperName` and `hasCustomGroup` fields on the existing `ForecastingType` metadata type, to indicate that a type includes a forecast group, based on a custom picklist. Use the new `ForecastingGroup` and `ForecastingGroupItem` metadata subtypes on the existing `ForecastingTypeSettings` to identify the group and its values.

Enable contextual insights in Sales Cloud Everywhere for the email integrations

Use the `enableExtensionHostUnrestricted` field on the existing `EmailIntegrationSettings` metadata type.

Enable the Read Receipt status for emails that are sent within the same domain

Use the `enableInboxInternalEmailTracking` field on the existing `EmailIntegrationSettings` metadata type.

Salesforce Flow

Lock or unlock a record for editing while an approval is in process, and specify a user, group, queue, or user role that can edit the record while it's locked

Use the new `lockRecord` value, which is in the existing `actionType` field on the existing `Flow` metadata type.

Check whether a value is blank in a flow or orchestration or whether a value is empty in a flow

Use the new `isBlank` value or `isEmpty` value, which is in the existing `operator` field on the existing `FlowCondition` subtype of the existing `Flow` metadata type.

Check whether a value is blank or is empty in a flow test

Use the new `isBlank` value or `isEmpty` value, which is in the existing `operator` field on the existing `FlowTestCondition` subtype of the existing `FlowTest` metadata type.

Check for matching records before creating new ones in the Create Records element

Use the new `filterLogic`, `filters`, `operationMultMatchingRecords`, `operationOneMatchingRecord`, and `operationZeroMatchingRecords` fields on the existing `FlowRecordCreate` subtype of the existing `Flow` metadata type.

Set the data type of the flow capability input

Use these new `string` value in the existing `dataType` field, which is on the existing `FlowCapabilityInput` subtype of the `Flow` metadata type.

Security and Identity

Mimic the behavior when browsers block third-party cookies

Use the new `isFirstPartyCookieUseRequired` field on the existing `MyDomainSettings` metadata type.

Specify more 4xx HTTP status codes to refresh access tokens for named credentials

Use the new `AdditionalRefreshStatusCode` value in the existing `parameterType` field on the `ExternalCredentialParameter` subtype of the `ExternalCredential` metadata type.

Configure OAuth handler policies for external client apps

Use the new `apexHandler` and `executeHandlerAs` fields on the existing `ExtClntAppOAuthConfigurablePolicies` metadata type.

Specify custom scopes for external client apps

Use the new `commaSeparatedCustomScopes` field on the existing `ExtClntAppOAuthConfigurablePolicies` metadata type.

Use an external client app for headless login, passwordless login, and guest user variations of the Authorization Code and Credentials Flow

Use the new `isCodeCredFlowEnabled` and `isCodeCredPostOnly` fields on the existing `ExtClntAppGlobalOAuthSettings` metadata type.

Configure external client app OAuth policies for the guest user variation of the Authorization Code and Credentials Flow

Use the new `guestJwtTimeout` and `isGuestCodeCredFlowEnabled` fields on the existing `ExtClntAppOAuthConfigurablePolicies` metadata type.

Enable an external client app to issue JSON Web Token (JWT)-based access tokens as a developer

Use the new `isNamedUserJwtEnabled` field on the existing `ExtClntAppGlobalOAuthSettings` metadata type.

Enable an external client app to issue JWT-based access tokens as an admin

Use the new `isNamedUserJwtEnabled` and `namedUserJwtTimeout` fields on the existing `ExtClntAppOAuthConfigurablePolicies` metadata type.

Configure an external client app for the OAuth 2.0 asset token flow

Use these new fields on the existing `ExtClntAppOAuthSettings` metadata type.

- `areAttributesIncludedInAssetToken`
- `areCustomPermsIncludedInAssetToken`
- `assetTokenAudiences`
- `assetTokenSigningCertificate`
- `assetTokenValidity`

Service

Track external interactions in messaging channels

Use the new `externalInteractionId`, `externalInteractionName`, and `externalInteractionType` fields on the existing `MessagingChannelStandardParameter` subtype of the `MessagingChannel` metadata type.

Define a messaging component for Enhanced Messaging channel or Messaging for In-App and Web session

Use the new `ConversationMessageDefinition` metadata type. Introduced in API version 59.0, this type has been added to the *Metadata API Developer Guide*.

Check whether a key is extracted automatically or manually in an OCR sample document

Use the new `isAutoExtractedValue` field on the existing `OcrSampleDocumentField` subtype of the `OcrSampleDocument` metadata type. Introduced in API version 57.0, this field has been added to the *Metadata API Developer Guide*.

Provide the option to create and automatically add cases to a queue in Catalog Item

Use the `Queue` enum value of the `displayType` field on the existing `PropertyDisplayType` subtype on the `SvcCatalogFulfillmentFlow` metadata type. Introduced in API version 57.0, this value has been added to the *Metadata API Developer Guide*.

Select a generic value for the Salesforce Cloud in Service Process Studio

Use the `Industry` enum value of the `usageType` field on the existing `SvcCatalogItemUsageType` subtype on the `ServiceProcess` metadata type. Introduced in API version 58.0, this value has been added to the *Metadata API Developer Guide*.

REMOVED: The `Health` enum value of the `usageType` field on the existing `SvcCatalogItemUsageType` metadata type has been removed.

The value was removed in API version 58.0. Instead, use the value `Industry`.

See the API version number in which a catalog item was created

Use the `apiVersion` field on the existing `SvcCatalogItemDef` metadata type. Introduced in API version 57.0, this value has been added to the *Metadata API Developer Guide*.

Customize access to catalog items based on eligibility rules

Use the `catalogFilterCriteria` field on the new `SvcCatalogItemDefFiltrCrit` subtype on the existing `SvcCatalogItemDef` metadata type. Introduced in API version 59.0, this value has been added to the *Metadata API Developer Guide*.

Classify catalog items by category

Use the `dataCategories` field on the existing `SvcCatalogItemDef` metadata type. Introduced in API version 59.0, this value has been added to the *Metadata API Developer Guide*.

REMOVED: The `Flow` field on the existing `SvcCatalogItemUsageType` metadata type has been removed.

The value was removed in API version 58.0. Instead, use the `fulfillmentFlow` field.

Associate a Service Catalog item with a fulfillment flow

Use the `fulfillmentFlow` field on the existing `SvcCatalogFulfillmentFlow` metadata type. Introduced in API version 56.0, this value has been added to the *Metadata API Developer Guide*.

Associate a catalog item with the attributes of a specific version

Use the `inputs` field on the existing `SvcCatalogItemAttribute` subtype on the `SvcCatalogItemDef` metadata type. Introduced in API version 57.0, this value has been added to the *Metadata API Developer Guide*.

Control internal user access to a catalog item

Use the `isAvailableToAllCustomers` field on the existing `SvcCatalogItemDef` metadata type.

Control guest user access to a catalog item

Use the `isGuestAvailable` field on the existing `SvcCatalogItemDef` metadata type.

SOQL

The updates to SOQL errors and functionality in this release could affect existing code that relies on old errors and functionality.

Changed Error Codes

The new error code `MALFORMED_QUERY` replaces the error code `INVALID_QUERY_FILTER_OPERATOR`.

Changed Functionality

Negative currency values are now supported in queries such as `SELECT Name FROM Invoice__c WHERE Balance__c < USD-500`.

Changed Error Messages

These cases use example SOQL queries to show how the resulting error messages have changed.

- Invalid SOQL queries
 - `SELECT Id FROM Account USING everything`
 - Old: unexpected token: '<EOF>'
 - New: unexpected token: 'everything'
 - `SELECT ParentId, Value FROM InteractionRefOrValue WHERE ParentId IN ()`
 - Old: unexpected token: ')'
 - New: unexpected token: 'ParentId IN ()'
 - `SELECT FROM ServicePresenceStatus`
 - Old: unexpected token: 'FROM'
 - New: unexpected token: 'SELECT FROM'
 - `SELECT Id from $casecomment WHERE isdeleted = false`
 - Old: line 1:15 no viable alternative at character '\$'
 - New: line 1:15 unexpected token: '\$'
 - `SELECT lastmodifieddate, companyna fr$om user`
 - Old: unexpected token: user
 - New: missing value at 'user'

- Quotes surrounding an unexpected token

```
SELECT annualrevenue , parentid FROM Account
      WHERE (isDeleted = false AND NumberOfEmployees != 100)
      OR (isDeleted = false AND Site = '999')
      AND ParentId = '0000000000000000' LIMIT 50000 OFFSET 0
```

- Old: unexpected token: AND
- New: unexpected token: 'AND'

```
SELECT Id, HP_Lead_ID__c, ResponseId__c, Status, Status_Reason__c,
      Nurture_Reasons__c, Nurture_Type__c, Lead_Close_Reasons__c, FirstName,
      LastName,
      Name, Email, Phone, MobilePhone, Company, Street, City, State, PostalCode,
      Country, Region__c,
      OwnerId, owner.name, HPD_Opportunity_ID__c, ProductFamily__c, Products__c,
      Reseller_Account__c, Segment__c, Sub_Segment__c FROM Lead
      WHERE RecordType.name='Commercial'
      AND ProductFamily__c <> 'IA - Software'
      AND Company LIKE '%GM%' OR Domain__c='gm.com'
```

- Old: unexpected token: OR
- New: unexpected token: 'OR'

- Using NULL literals in WHERE statements with the LIKE keyword

- ```
SELECT Id, Name, Country__c, State__c, City__c, PAN_Number__c
 FROM Account WHERE PAN_Number__c LIKE NULL AND Name LIKE '%a%'
```

  - Old: invalid operator
  - New: unexpected token: 'OR'
- More than two nested functions
  - ```
SELECT convertCurrency(calendar_year(convertTimezone(lastmodifieddate))) FROM
      account
```

 - Old: expecting a right parentheses, found '('
 - New: unexpected token: '('
- Invalid datetime literals
 - ```
SELECT Id FROM Account WHERE SystemModstamp > 2020-12-12t12:12:00-25:00
```

    - Old: line 1:67 mismatched character '5' expecting set '0'..'3'
    - New: Invalid datetime: 2020-12-12t12:12:00-25:00
  - ```
SELECT Id FROM Account WHERE SystemModstamp > 2020-52-12t12:12:00-05:00
```

 - Old: line 1:51 no viable alternative at character '5'
 - New: Invalid datetime: 2020-52-12t12:12:00-05:00
- Using "WITH SECURITY_ENFORCED" without a proper Apex context setup
 - ```
SELECT Id FROM Account WITH SECURITY_ENFORCED
```

    - Old: SECURITY\_ENFORCED not allowed in this context
    - New: rule soqlWithIdentifierClause failed predicate:
 

```
{this.helper.allowApexSyntax() && this.helper.hasApexContext()}?
```

## Tooling API New and Changed Objects

Access more metadata through these new and changed Tooling API objects.

### Customization

#### Specify which active user access policy is applied when a user meets the criteria for multiple policies

Use the new `Order` field on the existing `UserAccessPolicy` object.

### Development

#### Add Real-Time Event Monitoring events to a custom channel

Create a channel that can hold Real-Time Event Monitoring events by setting the new `EventType` field in `PlatformEventChannel`.

#### Decrease package install time in scratch orgs

Specify `FeatureEnforcement` in the new `SkipHandlers` field of the `PackageInstallRequest` object.

## Einstein

### Manage Einstein Copilot actions and customize the planner service

Use the new `GenAiFunctionDefinition` and `GenAiPlannerDefinition` objects.

## Security and Identity

### Specify more 4xx HTTP status codes to refresh access tokens for named credentials

Use the new `AdditionalRefreshStatusCode` value in the existing `ParameterType` field on the `ExternalCredentialParameter` object.

## User Interface API

Do more with lists, and work with more objects.

### IN THIS SECTION:

[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.

### Lists

#### Update list view metadata

Make a PATCH request to the existing `/ui-api/list-info/{objectApiName}/{listViewApiName}` resource.

New request body: List Info Input

#### Delete list view metadata

Make a DELETE request to the existing `/ui-api/list-info/{objectApiName}/{listViewApiName}` resource.

#### Get list views for an object

Make a GET request to the new `/ui-api/list-info/{objectApiName}` resource.

New response body: List Info Summary Collection

#### Create a list view for an object

Make a POST request to the new `/ui-api/list-info/{objectApiName}` resource.

New request body: List Info Post Input

#### Get metadata for a list view object

Make a GET request to the new `/ui-api/list-object-info/{objectApiName}` resource.

New response body: List Object Info

### Get list view records and filter your results with a search term or where string

Make a GET request to the existing `/ui-api/list-records/${listViewId}` or `/ui-api/list-records/${objectApiName}/${listViewApiName}` resource.

New request parameters: `searchTerm`, `where`

### Get list view records using a request body

Make a POST request to the existing `/ui-api/list-records/${objectApiName}/${listViewApiName}` resource.

New request body: List Records Input

### Get list preferences for a list view

Make a GET request to the new `/ui-api/list-preferences/${objectApiName}/${listViewApiName}` resource.

New response body: List Preferences

### Update list preferences for a list view

Make a PATCH request to the new `/ui-api/list-preferences/${objectApiName}/${listViewApiName}` resource.

New request body: List Preferences Input

New response body: List Preferences

### DEPRECATED: These list view resources are deprecated

| Task                                     | Deprecated Resources                                                                                              | Use Instead                                                                                                                                                                                                                                                                                                                                                                                                                |
|------------------------------------------|-------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Get list views for an object             | <code>/ui-api/list-ui/\${objectApiName}</code>                                                                    | GET <code>/ui-api/list-info/\${objectApiName}</code>                                                                                                                                                                                                                                                                                                                                                                       |
| Get list view records and metadata       | <code>/ui-api/list-ui/\${listViewId}</code><br><code>/ui-api/list-ui/\${objectApiName}/\${listViewApiName}</code> | <p><b>Records:</b></p> <p>GET <code>/ui-api/list-records/\${listViewId}</code></p> <p>GET <code>/ui-api/list-records/\${objectApiName}/\${listViewApiName}</code></p> <p>POST <code>/ui-api/list-records/\${objectApiName}/\${listViewApiName}</code></p> <p><b>Metadata:</b></p> <p>GET <code>/ui-api/list-info/\${listViewId}</code></p> <p>GET <code>/ui-api/list-info/\${objectApiName}/\${listViewApiName}</code></p> |
| Get most recently used list view records | <code>/ui-api/mru-list-records/\${objectApiName}</code>                                                           | <p>GET <code>/ui-api/list-records/\${objectApiName}/__Recent</code></p> <p>POST <code>/ui-api/list-records/\${objectApiName}/__Recent</code></p>                                                                                                                                                                                                                                                                           |
| Get most recently used                   | <code>/ui-api/mru-list-info/\${objectApiName}</code>                                                              | GET <code>/ui-api/list-info/\${objectApiName}/__Recent</code>                                                                                                                                                                                                                                                                                                                                                              |

| Task                                                  | Deprecated Resources                             | Use Instead                                                                                                                                                                                                                                                                   |
|-------------------------------------------------------|--------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| list view metadata                                    |                                                  |                                                                                                                                                                                                                                                                               |
| Get most recently used list view records and metadata | <code>/ui-api/mru-list-ui/{objectApiName}</code> | <p><b>Records:</b></p> <p>GET<br/> <code>/ui-api/list-records/{objectApiName}/__Recent</code></p> <p>POST<br/> <code>/ui-api/list-records/{objectApiName}/__Recent</code></p> <p><b>Metadata:</b></p> <p>GET<br/> <code>/ui-api/list-info/{objectApiName}/__Recent</code></p> |

## Changed User Interface API Response Bodies

These response bodies have changes.

Lists

### Field

This response has this changed property.

- `dataType`—This property supports the `Anytype`, `JunctionIdList`, and `Long` values.

### List Column

This response body has these new properties.

- `inlineEditAttributes`—Map of record type ID to inline edit attributes for the column.
- `searchable`—Indicates whether the list column can be searched.

### List Info

This response body has these new properties.

- `inlineEditDetails`—Inline edit details for the list.
- `listReference`—Object representing the list. Introduced in API version 43.0, this property was previously undocumented.
- `listShares`—Items that the list is shared with.
- `objectApiNames`—API names of objects that are returned by the list.
- `scope`—Scope information for the list.
- `searchable`—Indicates whether the list can be searched.

### List Record Collection

This response body has these new properties.

- `searchTerm`—Search term specified in the request.
- `where`—Where string specified in the request.

## 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.

- GroupMember
- MilestoneType
- Payment
- SurveyVersion
- Territory2

SEE ALSO:

[User Interface API Developer Guide: Send a Request Using Postman](#)

[User Interface API Developer Guide: Supported Objects](#)

## Einstein

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Supercharge your workforce efficiency with predictive and generative AI.

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IN THIS SECTION:

[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 June monthly release generally become available when Summer '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 June monthly release generally become available when Summer '24 rolls out to your org.

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| Cloud                  | Features                                     | Release Note                                                        |
|------------------------|----------------------------------------------|---------------------------------------------------------------------|
| <b>August '24</b>      |                                              |                                                                     |
| Platform: Flow Builder | Einstein for Flow: Flows Created by Einstein | <a href="#">Let Einstein Build a Draft Flow for You (Beta)</a>      |
| Service                | Work Summaries                               | <a href="#">Use Einstein Work Summaries in Additional Languages</a> |

| Cloud                                           | Features                                                     | Release Note                                                                                             |
|-------------------------------------------------|--------------------------------------------------------------|----------------------------------------------------------------------------------------------------------|
| <b>July '24</b>                                 |                                                              |                                                                                                          |
| Commerce                                        | Semantic Search                                              | <a href="#">Improve Search Results with Einstein Semantic Search</a>                                     |
| Industries: Education Cloud                     | Einstein Skills Generator                                    | <a href="#">Use AI to Set Course and Program Expectations with Einstein Skills Generator</a> on page 506 |
| Industries: Education Cloud                     | Intelligent Question Generation                              | <a href="#">Draft Questions by Using Einstein for Intake Assessments</a> on page 506                     |
| Industries: Nonprofit Cloud and Education Cloud | Einstein Copilot: Fundraising Gift Proposals                 | <a href="#">Draft Fundraising Gift Proposals with Einstein Copilot (Beta)</a> on page 515                |
| Service                                         | Work Summaries                                               | <a href="#">Customize Your Work Summaries in Copilot (Generally Available)</a>                           |
| <b>June '24</b>                                 |                                                              |                                                                                                          |
| Analytics                                       | Report Formula Generation                                    | <a href="#">Add Calculated Fields to Your Data Cloud Reports with Einstein Generative AI</a>             |
| Field Service                                   | Pre-Work Brief                                               | <a href="#">Customize the Pre-Work Brief with Prompt Builder</a>                                         |
| Industries: Contracts                           | Contracts AI                                                 | <a href="#">Tailor Your Default and New Field Prompts for Effective Data Extraction</a>                  |
| Industries: Health Cloud                        | Assessment Generation                                        | <a href="#">Automate Assessment Generation With Einstein Generative AI</a>                               |
| Industries: Net Zero Cloud                      | ESG Reports                                                  | <a href="#">Einstein for Net Zero Cloud</a>                                                              |
| Overall                                         | Salesforce Scheduler                                         | <a href="#">Generate Personalized Appointment Invitation Emails with Prompt Builder</a>                  |
| Sales                                           | Einstein Conversation Insights                               | <a href="#">Einstein Conversation Insights</a>                                                           |
| Sales: Experience Cloud                         | Einstein Sales Emails for Partners                           | <a href="#">Help Partners Send Personalized Sales Emails Fast</a>                                        |
| Sales                                           | Enablement, Relationship Selling, Sales Emails               | <a href="#">Einstein for Sales</a>                                                                       |
| Sales                                           | Einstein Copilot: Send Meeting Request                       | <a href="#">Improve the Convenience of Setting Up Meeting Requests</a>                                   |
| Service                                         | Article Recommendations, Feedback Management, Work Summaries | <a href="#">Einstein for Service</a>                                                                     |
| Service                                         | Service Catalog                                              | <a href="#">Einstein for Service Catalog (Beta)</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.

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| Features                                           | Release Note                                                                                                                                                                                                                                                                                                           |
|----------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>August '24</b>                                  |                                                                                                                                                                                                                                                                                                                        |
| Einstein Copilot                                   | <a href="#">Handle More Use Cases More Consistently with Copilot Topics</a> on page 320                                                                                                                                                                                                                                |
| Einstein Data Library                              | <a href="#">Ground Generative AI Responses with Einstein Data Library (Generally Available)</a>                                                                                                                                                                                                                        |
| Einstein Studio in Data Cloud                      | <a href="#">Create and Customize Retrievers in Einstein Studio</a>                                                                                                                                                                                                                                                     |
| Prompt Builder                                     | <a href="#">Get Prompt Responses in More Languages</a> on page 328<br><a href="#">Ground Your Prompt Templates with Retrieval Augmented Generation (RAG)</a> on page 329<br><a href="#">Use One Apex Class or Flow in Multiple Prompt Templates</a> on page 330<br><a href="#">Work with Large Prompts</a> on page 331 |
| Retrieval Augmented Generation (RAG) in Data Cloud | <a href="#">Supercharge Einstein Generative AI with Retrieval Augmented Generation (RAG)</a>                                                                                                                                                                                                                           |
| Other Changes                                      | <a href="#">Explore More Anthropic, Google, and OpenAI Models on the Einstein Platform</a> on page 333<br><a href="#">Get Optimized Einstein Responses with Einstein Data Prism</a> on page 334<br><a href="#">OpenAI GPT 3.5 Turbo 16k and Azure OpenAI GPT 3.5 Turbo 16k Shutdown Date Approaching</a> on page 334   |
| <b>July '24</b>                                    |                                                                                                                                                                                                                                                                                                                        |
| Einstein Copilot                                   | <a href="#">Give Feedback on Copilot Responses</a><br><a href="#">See Records from Different Objects in Einstein Copilot's Responses</a><br><a href="#">The Mask Personally Identifiable Information (PII) Setting Has Been Removed</a><br><a href="#">New and Changed Standard Copilot Topics and Actions</a>         |
| Einstein Development                               | <a href="#">Connect Your Application to Large Language Models with Models API (Beta)</a>                                                                                                                                                                                                                               |
| Einstein Studio in Data Cloud                      | <a href="#">Manage AI Models in Einstein Studio</a><br><a href="#">Power Your Generative AI Using Anthropic Models with Prompt Builder</a><br><a href="#">Power Your Generative AI with Google Gemini and Prompt Builder</a>                                                                                           |
| Einstein Trust Layer                               | <a href="#">Get More Trust Layer Audit Dashboards and Reports</a>                                                                                                                                                                                                                                                      |
| Prompt Builder                                     | <a href="#">Create Flex Prompt Templates with Free Text Inputs</a><br><a href="#">View Harmful Content Notification in a Prompt Response</a>                                                                                                                                                                           |

| Features                                           | Release Note                                                                                                                                                                                                                                                                                                                                                                                                    |
|----------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Other Changes                                      | <a href="#">Geo-Aware LLM Request Routing Is Available in the Einstein Generative AI Platform</a><br><a href="#">Manage your Models on the Supported Models Page</a>                                                                                                                                                                                                                                            |
| <b>June '24</b>                                    |                                                                                                                                                                                                                                                                                                                                                                                                                 |
| Einstein Bots                                      | <a href="#">Answer Questions Easily with Knowledge and Generative AI</a><br><a href="#">Get the Information Your Team Needs with Required Responses</a><br><a href="#">Run Flows in Bot User Context (Release Update)</a><br><a href="#">New Invocable Actions for Einstein Bots</a><br><a href="#">View Standard Bot Reports in the Summer '24 Folder</a>                                                      |
| Einstein Copilot                                   | <a href="#">Clear Your Einstein Copilot Feed History</a><br><a href="#">Give Users Control in Custom Einstein Copilot Actions</a><br><a href="#">New and Changed Standard Copilot Topics and Actions</a>                                                                                                                                                                                                        |
| Einstein Studio in Data Cloud                      | <a href="#">Leverage Alerts to Evaluate the Quality of Your Predictive Model</a><br><a href="#">Let Einstein Autoselect the Best Factors for Your Use Case</a><br><a href="#">Evaluate Your Model Performance with Activity Metrics</a><br><a href="#">Access Models Quicker with the Updated Einstein Studio Navigation</a><br><a href="#">Einstein Studio Legacy Tab Is No Longer Available in Data Cloud</a> |
| Prompt Builder                                     | <a href="#">Ground Your Prompts Automatically</a><br><a href="#">View Masking of Sensitive Data in Prompts on page 331</a>                                                                                                                                                                                                                                                                                      |
| Retrieval Augmented Generation (RAG) in Data Cloud | <a href="#">Enhance Your AI and Automation Strategies with Unstructured Data in Data Cloud</a><br><a href="#">Improve Search Accuracy with Hybrid Search (Beta)</a><br><a href="#">Use Vector Search in Generative AI, Automation, and Analytics Tools</a>                                                                                                                                                      |
| Other Changes                                      | <a href="#">Use Supported Locales in the Einstein Generative AI Platform</a><br><a href="#">Use the Starter Usage Type for Lower Cost Models</a>                                                                                                                                                                                                                                                                |

## Einstein Bots

Get key information from customers by requiring an answer to certain questions. And, if you have Einstein Copilot, generate conversational answers to customer questions by connecting the Answer Questions with Knowledge copilot action to your bot.



## IN THIS SECTION:

[Get the Information Your Team Needs with Required Responses](#)

Get key information from customers by requiring an answer to certain questions. When you require a response for a Question dialog step, the bot repeats the question until the customer's response fits the entity requirements.

[Answer Questions Easily with Knowledge and Generative AI](#)

Generate conversational answers to customer questions with Generative Knowledge Answers. When a customer asks your bot a question, Generative Knowledge Answers searches for relevant information in your knowledge articles using the Answer Questions with Knowledge copilot action. If the copilot action finds information, the copilot platform sends an AI-generated response to the bot. Then the bot delivers the response as a message to the customer. Currently, this feature is available in English only.

[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 Summer '24 Folder](#)

Each release, Einstein Bots adds a folder that contains the latest versions of all standard bot reports. In Summer '24, no changes affect standard bot metric types or individual reports from Spring '24, but you can access fresh versions of all reports in the Einstein Bot Reports Summer '24 folder.

[New Invocable Actions for Einstein Bots](#)

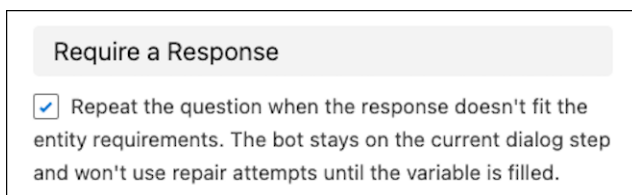
Use the new invocable actions and changed metadata type for Einstein Bots. To use these actions and values, you must enable Lightning Knowledge.

## Get the Information Your Team Needs with Required Responses

Get key information from customers by requiring an answer to certain questions. When you require a response for a Question dialog step, the bot repeats the question until the customer's response fits the entity requirements.

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

**How:** In the Bot Builder, go to the Question dialog step that you want to require. In the Step Properties panel, enable Require a Response, and then save your changes.



## SEE ALSO:

[Salesforce Help: Use a Dialog Question Step \(can be outdated or unavailable during release preview\)](#)

## Answer Questions Easily with Knowledge and Generative AI

Generate conversational answers to customer questions with Generative Knowledge Answers. When a customer asks your bot a question, Generative Knowledge Answers searches for relevant information in your knowledge articles using the Answer Questions with Knowledge copilot action. If the copilot action finds information, the copilot platform sends an AI-generated response to the bot. Then the bot delivers the response as a message to the customer. Currently, this feature is available in English only.

**Where:** This change applies to Lightning Experience in:

- Enterprise, Performance, and Unlimited editions with an Einstein for Sales, Einstein for Platform, or Einstein for Service add-on
- Einstein 1 Service Edition

**When:** Generative Knowledge Answers for Einstein bots is available starting in July 2024.

**Who:** To use Generative Knowledge Answers with Einstein bots, you must have a Knowledge license.

**How:** Set up Lightning Knowledge. Then, in the Bot Builder, go to the Bot Overview page. In the Knowledge section of Settings, select **Use features that intelligently search for knowledge articles with this bot**. Then, for the knowledge feature, select **Copilot Action: Answer Questions with Knowledge**.

SEE ALSO:

[Salesforce Help: Answer Questions with Generative Knowledge Answers \(can be outdated or unavailable during release preview\)](#)

## 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 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 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 production, 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 Summer '24 Folder

Each release, Einstein Bots adds a folder that contains the latest versions of all standard bot reports. In Summer '24, no changes affect standard bot metric types or individual reports from Spring '24, but you can access fresh versions of all reports in the Einstein Bot Reports Summer '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 \(can be outdated or unavailable during release preview\)](#)

## New Invocable Actions for Einstein Bots

Use the new invocable actions and changed metadata type for Einstein Bots. To use these actions and values, you must enable Lightning Knowledge.

### Search for knowledge articles based on data category and data category groups

Use the new `searchKnowledgeArticles`, `getDataCategoryGroups`, and `getDataCategoryDetails` actions. Introduced in API version 56.0, these actions have been added to the Actions Developer Guide.

Use the new `searchKnowledgeArticles`, `getDataCategoryGroups`, and `getDataCategoryDetails` values in the existing `actionType` field on the existing Flow metadata type. Introduced in API version 56.0, these fields have been added to the Metadata API Developer Guide.

## Einstein Copilot

Bring the power of conversational AI to your business with Einstein Copilot.

Einstein Copilot features are released as often as monthly, and there's much more to come in Summer '24. In the meantime, we're continuing to add features to Spring '24 through May 2024. [Check out our Spring '24 release notes to learn more.](#)

In July's release, you can give feedback on Copilot responses, see different object records in searches, and clear your Copilot history to start a new session.

In June's release, Einstein Copilot end users can clear Einstein Copilot feed history and receive a confirmation request before a copilot makes changes in your org.

IN THIS SECTION:

### [Handle More Use Cases More Consistently with Copilot Topics](#)

Introducing topics, a new layer of organization and customization that helps your copilot make more accurate decisions and generate more relevant, predictable responses. Topics represent the jobs you want your copilot to handle using a set of related instructions and actions. Now when a user enters a question or request, instead of searching through a flat list of all actions assigned to it, your copilot selects a relevant topic and then launches one or more actions included within that topic. This keeps your copilot focused on the actions and data that are most relevant to the current conversation. Plus, the instructions in a topic tell your copilot how to use the actions within the topic, which gives you more granular control over how your copilot makes decisions. Get started quickly with a library of out-of-the-box standard topics for common use cases, or create custom topics to meet your unique business needs.

### [The Mask Personally Identifiable Information \(PII\) Setting Has Been Removed](#)

Copilot actions apply Einstein Trust Layer data masking by default, so the Mask personally identifiable information (PII) setting has been removed from custom and standard copilot action inputs and outputs. The Trust Layer uses a combination of pattern matching and machine learning techniques to automatically identify and mask PII, no additional settings required.

### [Give Feedback on Copilot Responses](#)

Users can now give a thumbs up or thumbs down on Copilot responses and let Salesforce know if the responses were helpful. When users hover over a Copilot response and select a thumbs down, they can select a reason why the response was unhelpful, or they can use the Other field to enter a reason not represented in the list. In the Salesforce mobile app, users can give feedback when they long-press a system-generated response.

### [See Records from Different Objects in Einstein Copilot's Responses](#)

Users can now see responses from Einstein Copilot that combine different object types in one list. For example, a salesperson asks Einstein Copilot, "Show me all the records owned by John Smith." After clicking View More, the salesperson can now see accounts, contacts, opportunities, and campaigns owned by John Smith in one list in the new All Records tab.

### [Clear Your Einstein Copilot Feed History](#)

Have a bit of clutter in your feed after a long chat with Einstein Copilot? Clear your feed history and start fresh with a new session. Clearing your feed history deletes previous interactions with Einstein Copilot, so if you need a response in your feed, make sure that you saved it elsewhere.

### [Give Users Control in Custom Einstein Copilot Actions](#)

When you create a custom action for Einstein Copilot, enable the Require user confirmation setting so that your users receive a confirmation request before a copilot makes changes to your org. For example, a salesperson uses a custom action to ask Einstein Copilot to update an opportunity's stage that's currently set at Prospecting. Einstein Copilot reviews the activities around the opportunity and settles on the Negotiation stage. Before making the update, the salesperson must click Confirm to ensure that the stage is the correct one.

### [New and Changed Standard Copilot Topics and Actions](#)

Quickly add powerful functionality to a copilot with new and changed copilot standard topics and actions.

## Handle More Use Cases More Consistently with Copilot Topics

Introducing topics, a new layer of organization and customization that helps your copilot make more accurate decisions and generate more relevant, predictable responses. Topics represent the jobs you want your copilot to handle using a set of related instructions and actions. Now when a user enters a question or request, instead of searching through a flat list of all actions assigned to it, your copilot selects a relevant topic and then launches one or more actions included within that topic. This keeps your copilot focused on the actions and data that are most relevant to the current conversation. Plus, the instructions in a topic tell your copilot how to use the actions within the topic, which gives you more granular control over how your copilot makes decisions. Get started quickly with a library of out-of-the-box standard topics for common use cases, or create custom topics to meet your unique business needs.

**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:** Topics and planner service enhancements are available on a rolling basis starting the week of August 26, 2024.

**Why:** In addition to the performance improvements that you get with topics in Einstein Copilot, here are some other changes you can expect.

- To use an action with your copilot, assign the action to a topic and assign the topic to your copilot. Previously, you could assign an action directly to a copilot. You can assign an action to multiple topics to apply it differently to different use cases and get a context-appropriate result.
- To ensure a smooth transition to topics in Einstein Copilot, all of the actions previously assigned directly to your copilot are available in a topic called Migration Default Topic. However, because of the general nature of this topic, the actions and instructions aren't optimized for your use cases. For best performance, we recommend creating custom topics and moving your actions as soon as possible.
- We created two new standard topics to support fundamental Einstein Copilot use cases. The General CRM topic handles user requests that are related to retrieving Salesforce CRM data, including identifying, updating, and summarizing records and finding and querying Salesforce objects. The Single Record Summary topic generates a summary of a record. These topics are assigned to new copilots by default. Learn more about these topics in the Copilot Standard Topic Reference.
- Topics are part of larger improvements we've made to the planner service, or Einstein Copilot's reasoning engine. The plan canvas in the Copilot Builder now includes steps related to topics. Plus, instead of generating a single plan, you see your copilot making more frequent, iterative decisions between actions and in response to user input.

- With this change, Einstein Copilot no longer supports masking of personally identifiable information (PII) through the Einstein Trust Layer.

**How:** To add a topic to your copilot, open your copilot in the Copilot Builder. From the Topics panel, you can select a standard topic from the asset library. Or you can create a custom topic, including defining actions and instructions.

You can view or edit your custom topic from the Topics panel in the Copilot Builder. To view or edit your topic's details, click the topic name and select the **Topic Configuration** tab. To view, add, or remove copilot actions from your topic, select the **This Topic's Actions** tab.

To make changes to your copilot's topics and actions, your copilot must be deactivated.

SEE ALSO:

[Salesforce Help: Einstein Copilot Topics](#)

[Salesforce Help: Standard Topic Reference](#)

## The Mask Personally Identifiable Information (PII) Setting Has Been Removed

Copilot actions apply Einstein Trust Layer data masking by default, so the Mask personally identifiable information (PII) setting has been removed from custom and standard copilot action inputs and outputs. The Trust Layer uses a combination of pattern matching and machine learning techniques to automatically identify and mask PII, no additional settings required.

**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:** This change applies starting the week of June 17, 2024.

SEE ALSO:

[Salesforce Help: Data Masking](#)

## Give Feedback on Copilot Responses

Users can now give a thumbs up or thumbs down on Copilot responses and let Salesforce know if the responses were helpful. When users hover over a Copilot response and select a thumbs down, they can select a reason why the response was unhelpful, or they can use the Other field to enter a reason not represented in the list. In the Salesforce mobile app, users can give feedback when they long-press a system-generated 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.

**When:** On iOS and Android devices, the feature is available the week of July 1, 2024.

SEE ALSO:

[Salesforce Help: Einstein Audit and Feedback Data](#)

## See Records from Different Objects in Einstein Copilot's Responses

Users can now see responses from Einstein Copilot that combine different object types in one list. For example, a salesperson asks Einstein Copilot, "Show me all the records owned by John Smith." After clicking View More, the salesperson can now see accounts, contacts, opportunities, and campaigns owned by John Smith in one list in the new All Records tab.

**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:** On iOS and Android devices, the feature is available the week of July 1, 2024.

## Clear Your Einstein Copilot Feed History

Have a bit of clutter in your feed after a long chat with Einstein Copilot? Clear your feed history and start fresh with a new session. Clearing your feed history deletes previous interactions with Einstein Copilot, so if you need a response in your feed, make sure that you saved it elsewhere.

**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.

**How:** Use the clear history icon to clear your feed and start a new session.

**When:** On iOS and Android devices, the feature is available the week of July 1, 2024.

## Give Users Control in Custom Einstein Copilot Actions

When you create a custom action for Einstein Copilot, enable the Require user confirmation setting so that your users receive a confirmation request before a copilot makes changes to your org. For example, a salesperson uses a custom action to ask Einstein Copilot to update an opportunity's stage that's currently set at Prospecting. Einstein Copilot reviews the activities around the opportunity and settles on the Negotiation stage. Before making the update, the salesperson must click Confirm to ensure that the stage is the correct one.

**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.

**How:** When you create a custom action, enable the Require user confirmation setting and the confirmation button shows up on the action.

**When:** On iOS and Android devices, the feature is available the week of July 1, 2024.

## New and Changed Standard Copilot Topics and Actions

Quickly add powerful functionality to a copilot with new and changed copilot standard topics and actions.

Availability of copilot standard topics, actions, and related prompt templates can vary by edition and license.

### Week of August 26, 2024

#### **New Topic: [General CRM](#) on page 320**

The new General CRM topic handles user requests related to Salesforce CRM data, including identifying, summarizing, or updating records, drafting or refining emails, aggregating data, and finding and querying Salesforce objects. It includes three new copilot actions.

- [Get Record Details](#): Helps users get information about a specific record. When responding to a user's question or request, the action can retrieve object fields and values, records from related lists, and associated tasks and events.
- [Get Activities Timeline](#): Retrieves a list of all activities associated with a record during the specified time frame. The list can include past and future activities.
- [Get Activity Details](#): Provides a brief summary of an activity, including an overview of its content (such as an email or a call summary) and other relevant details. Valid activity types are calls, emails, events, or tasks.

**New Topic: [Single Record Summary](#) on page 320**

The new Record Summary topic generates a summary for a single Salesforce record.

**New Topic: [Close Deals](#)**

The Close Deals topic uses AI-powered insights to heighten sales success. Get recommendations on the best approach to close deals, based on past deals won, conversation signals, and customer sentiment. Sellers also get answers to product-related pricing questions, briefings on customer sentiments based on conversations, and suggestions for close plans to help you close deals.

**New Topic: [Communicate with Customers](#)**

Generate personalized and clear communications to help sellers engage with prospects, contacts, and leads via email, follow-ups, and meeting requests.

**New Topic: [Conversation Explorer](#)**

Answer user's questions about a voice or video call based on the contents of the call transcript.

**New Topic: [Forecast Sales Revenue](#)**

Use the Forecast Sales Revenue topic for comprehensive insight into predicting sales revenue. Gain an understanding of your team's forecasts, predict future sales based on current market signals or predictive analysis, and get answers to queries related to deal alerts, risky deals, or estimations around deal value.

**New Topic: [Manage Deals](#)**

The Manage Deals topic equips sellers with the strategic information to effectively oversee your deals. Sellers can get information about specific contacts or relationships with contact accounts, empowering them to make informed decisions. By identifying similar opportunities, users can optimize their deal strategies and prioritize crucial activities and accounts, all while ensuring their CRM remains current with the latest tasks, calls, and customer interactions. This comprehensive approach provides a more real-time view of deals and pipelines, ultimately leading to more effective deal management.

**Week of August 5, 2024****[Draft or Revise Email](#)**

The Draft or Revise Email action can now chain more than one action together to handle multiple intents. For example, Einstein Copilot can help a user summarize a call and then email it to someone in a single request: "Summarize the latest call with this customer and email it to Sofia Rodriguez." Behind the scenes, the Summarize Record action passes the action's output (a summary) to the Draft or Revise Email action as an input.

Examples

- "Summarize the Acme campaign and email it to John Smith."
- "Find the return policy for the Studio Pro headphones and email it to this customer."
- "Summarize the most recent Acme case and email it to Isaac Goldstein."

**Week of July 15, 2024****[Summarize Record](#)**

When Einstein Copilot users request a summary of an account, now Einstein generates a more comprehensive and information-rich summary. The improved account summary captures a snapshot of the account, including account details, open cases, past purchases, current opportunities, relevant interactions, and more.

**[Get Forecast Guidance](#)**

The Get Forecast Guidance copilot action is now powered by a flow.

## Week of July 8, 2024

### [Customize Work Summaries on page 776](#)

Now, you can customize how Einstein drafts Work Summaries in Copilot. Get summaries that meet your team's needs by adding your own formatting rules or restrictions to the prompt template that guides Einstein responses.

## Week of June 17, 2024

### [Draft a Gift Proposal](#)

Nonprofit and Education Cloud customers can now use Copilot Actions Fundraising Gift Proposals to streamline and expedite writing compelling and personalized gift proposals using data in your Salesforce org. This feature is available with Einstein Copilot.

## Week of June 10, 2024

### [Send Meeting Request](#)

Sales users can use the new Send Meeting Request copilot action to draft a meeting request to a recipient. The email draft contains three time slots and a link to the sender's calendar to schedule a meeting.

## June '24

New and changed copilot actions included in the June monthly release generally become available when Summer '24 rolls out to your org.

### [Answer Questions with Knowledge](#)

Einstein Bots customers can now use the existing Answer Questions with Knowledge copilot action in a bot.



**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](#).

### [Service Catalog Item \(Reference Action Type\)](#)

Service Catalog customers can use the new Service Catalog Item reference action type to create custom actions from their Service Catalog items. Plus, access custom actions prebuilt for Service Catalog use cases in just a few clicks.

## Einstein Data Library

Use Einstein Data Library to enhance the accuracy of AI in your features.

### IN THIS SECTION:

#### [Ground Generative AI Responses with Einstein Data Library \(Generally Available\)](#)

Improve accuracy, add personalization, and build trust in AI-generated responses when you add data libraries to your Einstein features. Einstein Data Library indexes your knowledge articles and fields so that Einstein knows which information to ground responses on. Using this index, Einstein can quickly check the accuracy of responses against your Knowledge base, ensuring you get the best results.

### **Ground Generative AI Responses with Einstein Data Library (Generally Available)**

Improve accuracy, add personalization, and build trust in AI-generated responses when you add data libraries to your Einstein features. Einstein Data Library indexes your knowledge articles and fields so that Einstein knows which information to ground responses on. Using this index, Einstein can quickly check the accuracy of responses against your Knowledge base, ensuring you get the best results.

**Where:** Einstein Data Library is available in Lightning Experience in Enterprise and Unlimited editions with the Einstein for Sales, Einstein for Platform, or Einstein for Service add-on.



**How:** From Setup, go to Einstein Data Library. To create a Data Library, select **New Library**. Enter a library name and API name, and then save the library. Next, select the identifying fields and content fields, and filter knowledge articles by data category. Data Libraries support Knowledge objects only.

### Turn on Einstein Data Library Einstein Data Lib

Use Einstein to draft emails, chat and messaging replies, and more, grounded in defined data sources. For example, use your knowledge articles to add context and personalization to customer communications.

To get started, turn on the Einstein Data Library and create a library. Then, select the best library to ground on for each feature or set of features.

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### Data Libraries

Help Einstein focus on the right objects and fields. Create different libraries to customize the information Einstein grounds on for different features.

2 libraries available New

| Library Name                            | API Name                | Feature Assignments |
|-----------------------------------------|-------------------------|---------------------|
| <a href="#">Service Replies Segment</a> | service_replies_segment | Unassigned          |
| <a href="#">Bots Segment</a>            | bots_segment            | Unassigned          |

When you're happy with your Data Library settings, assign the library to AI features. You can create multiple data libraries and assign them to multiple features, but each feature uses one data library at a time. See which features [support Einstein Data Libraries](#).

SEE ALSO:

[Einstein Platform](#)

[Salesforce Help: Einstein Data Library](#)

## Einstein Development

Develop custom solutions with our suite of generative AI tools, including the Models API, Einstein Copilot, Prompt Builder, and Einstein Studio.

IN THIS SECTION:


[Connect Your Application to Large Language Models with Models API \(Beta\)](#)

Models API enhances your application with large language models (LLMs) from Salesforce partners. You can use Models API for different scenarios that benefit from generative AI, such as taking advantage of system prompts to refine your communication using your brand-specific voice and tone. You can also bring your own LLM (BYOLLM) credentials from Amazon Bedrock, Azure OpenAI, OpenAI, and Vertex AI to access models enabled by Salesforce.

## Connect Your Application to Large Language Models with Models API (Beta)

Models API enhances your application with large language models (LLMs) from Salesforce partners. You can use Models API for different scenarios that benefit from generative AI, such as taking advantage of system prompts to refine your communication using your brand-specific voice and tone. You can also bring your own LLM (BYOLLM) credentials from Amazon Bedrock, Azure OpenAI, OpenAI, and Vertex AI to access models enabled by Salesforce.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions with an Einstein for Sales, Einstein for Platform, or Einstein for Service add-on. To purchase the Einstein for Sales, Einstein for Platform, or Einstein for Service add-on, contact your Salesforce account executive.

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

**When:** Models API (Beta) feature is available starting in July 2024.

**Who:** This feature is available to Salesforce customers with Data Cloud and Einstein permission sets.

**How:** Developers can access Models API with REST or Apex.

SEE ALSO:

[Einstein Generative AI Developer Guide](#)

[Salesforce Help: Einstein Generative AI & Trust](#)

## Einstein Studio in Data Cloud

Explore new Einstein Studio capabilities such as autoselection, metrics, and alerts. Simplify how you manage your AI models with enhanced permissions, navigation, and user interface. Discover how the new large language models can help you power your generative AI use cases with 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

Elevate the security of generative AI at Salesforce through data and privacy controls that are integrated into the end-user experience.

IN THIS SECTION:

[Get More Trust Layer Audit Dashboards and Reports](#)

We're adding new pre-built dashboards and reports in Data Cloud to help you monitor and verify the Einstein Trust Layer metrics. Now, you can easily see and verify how data masking works in prompts and responses. Explore content safety issues such as toxicity in the generated responses.

## Get More Trust Layer Audit Dashboards and Reports

We're adding new pre-built dashboards and reports in Data Cloud to help you monitor and verify the Einstein Trust Layer metrics. Now, you can easily see and verify how data masking works in prompts and responses. Explore content safety issues such as toxicity in the generated responses.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions with an Einstein for Sales, Einstein for Platform, or Einstein for Service add-on.

**When:** The new reports and dashboards will be available starting mid-July 2024.

**Who:** Anyone who has access to reports and dashboards can use this feature.

**How:** The latest reports and dashboards are available after you turn on the Einstein Generative AI Data Collection and Storage feature in the Einstein Generative AI Setup.

If you previously installed the Einstein Generative AI and Feedback Data report package, you can now uninstall it. The package is no longer necessary for accessing the audit and feedback reports and dashboards.

This update includes the Einstein Trust Layer dashboard, which is dynamic. Because it's a dynamic dashboard, it counts toward your total number of available dynamic dashboards.

#### SEE ALSO:

[Salesforce Help: Turn On Einstein Generative AI Data Collection and Storage](#)

[Salesforce Help: Share Insights from Einstein Generative AI Audit Data](#)

[Salesforce Help: Dynamic Dashboards](#)

## Prompt Builder

Simplify your users' daily tasks by integrating generative-AI powered by prompt templates into their workflow. Create, test, revise, customize, and manage prompt templates that incorporate your CRM data from merge fields that reference record fields, flows, related lists, and Apex. Prompt Builder helps you to make effective prompts that safely connect you and your data with LLMs.

In July's release, Prompt Builder introduces Record Snapshots, a new grounding capability that adds relevant data from the user's page layout for an object with one click. Record Snapshots eliminates the need to individually select multiple fields and related lists for an object. Prompt Builder also supports free text inputs in flex prompt templates, allowing you to include free text input fields just like merge fields or other resources. This feature enables handling multiple scenarios where your prompt template must receive free text as input. Additionally, you can now see when the Einstein Trust layer masks sensitive data by sending placeholder text, with a summary of all masked data available in the Data Masking Details dialog. Prompt Builder also provides a visual alert for any harmful responses from the LLM, ensuring your responses are nontoxic and inclusive.

#### IN THIS SECTION:

[Create Flex Prompt Templates with Free Text Inputs](#)

Enjoy more powerful customization capabilities for your prompt authoring. Prompt Builder now supports free text inputs for use in flex prompt templates, so you can now use flex prompt templates in scenarios when you want to provide any manner of text as an input to your prompt.

[Get Prompt Responses in More Languages](#)

Prompt Builder supports four additional languages for prompt template responses: Dutch (Netherlands), Portuguese (Brazil), Spanish (Mexico), and Swedish (Sweden). Prompt Builder now supports prompt template responses in ten languages, allowing your global sales and service teams to improve communication and efficiency.

[Ground Your Prompts Automatically](#)

With Record Snapshots, it's easier than ever to use your Salesforce data in Prompt Builder. Record Snapshots brings a new way to ground your prompts, by automatically including data available on the user's page layout for an object with one resource.

### [Ground Your Prompt Templates with Retrieval Augmented Generation \(RAG\)](#)

Prompt Builder now supports Retrieval Augmented Generation (RAG), enabling you to add tailored, relevant data from large datasets directly into prompt templates. A retriever returns relevant facts from textual data, which is indexed in a vector database, to augment a Large Language Model (LLM) prompt. By augmenting the prompt with accurate, current, and pertinent information, retrievers improve the value and relevance of the LLM response for the user.

### [Use One Apex Class or Flow in Multiple Prompt Templates](#)

Now you can create a single Apex class or prompt-triggered flow and apply it across various templates, independent of their prompt template types.

### [View Harmful Content Notification in a Prompt Response](#)

Quickly identify harmful language in prompt responses for safer, inclusive interactions, and make sure nothing harmful slips through.

### [View Masking of Sensitive Data in Prompts](#)

Einstein Trust layer masks sensitive data from the LLM by sending placeholder text. Now, you can see the placeholder text in the prompt resolution. In the response, you can see the demasked data added back in by Salesforce. A summary of all masked data for the response appears in the Data Masking Details dialog.

### [Work with Large Prompts](#)

When a prompt is too large for the model to use, an error no longer occurs. Now, a summary is generated automatically in the Resolution panel. You can choose to keep using the summarized prompt or create a smaller prompt.

## Create Flex Prompt Templates with Free Text Inputs

Enjoy more powerful customization capabilities for your prompt authoring. Prompt Builder now supports free text inputs for use in flex prompt templates, so you can now use flex prompt templates in scenarios when you want to provide any manner of text as an input to your prompt.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions. Einstein generative AI is available in Lightning Experience.

**When:** This feature is available starting on June 26, 2024.

SEE ALSO:

[Salesforce Help: Add Free Text Inputs to a Flex Prompt Template](#)

## Get Prompt Responses in More Languages

Prompt Builder supports four additional languages for prompt template responses: Dutch (Netherlands), Portuguese (Brazil), Spanish (Mexico), and Swedish (Sweden). Prompt Builder now supports prompt template responses in ten languages, allowing your global sales and service teams to improve communication and efficiency.

**Where:** Enterprise, Performance, and Unlimited Editions with the Einstein for Sales, Einstein for Platform, or Einstein for Service add-on.

**When:** This feature is available starting the week of August 12, 2024.

SEE ALSO:

[Salesforce Help: Supported Languages in Prompt Template Responses](#)

## Ground Your Prompts Automatically

With Record Snapshots, it's easier than ever to use your Salesforce data in Prompt Builder. Record Snapshots brings a new way to ground your prompts, by automatically including data available on the user's page layout for an object with one resource.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions. Einstein generative AI is available in Lightning Experience.

**When:** Record Snapshots is available on a rolling basis starting in sandbox environments on June 5, 2024 and in production on June 12, 2024.

**How:** From the resource picker in Prompt Builder, select an input object of the prompt template, and then select **Record Snapshot**. Then, craft a prompt as you normally do, and Record Snapshot grounds the prompt with data available on the user's page layout for the object.

SEE ALSO:

[Salesforce Help: Ground with Record Snapshots](#)

## Ground Your Prompt Templates with Retrieval Augmented Generation (RAG)

Prompt Builder now supports Retrieval Augmented Generation (RAG), enabling you to add tailored, relevant data from large datasets directly into prompt templates. A retriever returns relevant facts from textual data, which is indexed in a vector database, to augment a Large Language Model (LLM) prompt. By augmenting the prompt with accurate, current, and pertinent information, retrievers improve the value and relevance of the LLM response for the user.

**Where:** This change affects Lightning Experience in Enterprise, Performance, and Unlimited editions. Einstein generative AI is available in Lightning Experience.

**When:** Retrievers in Prompt Builder are available starting the week of August 19, 2024.

**How:** To use the retriever in Prompt Builder, from Setup, in the Quick Find box, enter **Prompt**, and then select **Prompt Builder**.

The screenshot displays the 'Prompt Template Workspace' interface. It is divided into several sections:

- 1** (Prompt Template): A text area containing instructions for generating an account description. The instructions mention using a retriever named 'Einstein Search: Wiki\_Search\_Index'.
- 2** (Resource Selector): A search box labeled 'Resource' with the placeholder text 'Search for or select a resource to insert..'. The 'Object Field' is set to 'Account > Account Description'.
- 3** (Configuration Panel): A side panel on the right with the following settings:
  - Wiki Search Index**: More
  - Description**: Default retriever of semantic search Index with all source DMO fields
  - Data Model Object**: WikiArticles
  - Version**: 1
  - Search Parameters**: Search Text (Search for or select a resource)
  - Output Fields**: 1 option selected (Chunk)
  - Number of Results**: 10
- 4** (Preview): A section at the bottom with a 'Resolution' toggle (Enabled) and a 'Related Record' search box. It includes a 'Save & Preview' button.

Provide instructions to the LLM to generate content (1).

Add the retriever in the Prompt Builder resources selector and select Einstein Search (2).

Use the configuration side panel to refine the dataset returned by the retriever (3).

Review, refine, and save the prompt template. When the template is tested and ready, activate it to make it available to use (4).

SEE ALSO:

[Salesforce Help: Add a Retriever to a Prompt Template](#)

## Use One Apex Class or Flow in Multiple Prompt Templates

Now you can create a single Apex class or prompt-triggered flow and apply it across various templates, independent of their prompt template types.

The inputs to the prompt template must include all the inputs to the Apex or flow. For flows, all inputs are considered required and must be present in the prompt template. For Apex, inputs are optional unless annotated as required. Optional Apex inputs don't have to be present in the prompt template. Apex and flows with no parameters work with all prompt templates. Previously, each flow or Apex class

was confined to a specific template that matched its input requirements. You not only build fewer flows, but you also use each flow more broadly.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions. Einstein generative AI is available in Lightning Experience.

**How:** Choose to either use automatic inputs based on the selected prompt template type or manually configure inputs. Consider the convenience of handling open cases for an Account across different departments using the same prompt flow. For example, a Field Generation template that requires an input for an account, and a Record Summary template that needs an account input can now use the same underlying flow.

**When:** This feature is available starting on August 26, 2024.

## View Harmful Content Notification in a Prompt Response

Quickly identify harmful language in prompt responses for safer, inclusive interactions, and make sure nothing harmful slips through.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions. Einstein generative AI is available in Lightning Experience.

**When:** The notification is available on a rolling basis starting in sandbox environments on July 9, 2024 and in production on July 11, 2024.

**How:** Craft, save, and preview your prompt. If any harmful content is in the prompt response, a Harmful Content badge is shown above the prompt response.

## View Masking of Sensitive Data in Prompts

Einstein Trust layer masks sensitive data from the LLM by sending placeholder text. Now, you can see the placeholder text in the prompt resolution. In the response, you can see the demasked data added back in by Salesforce. A summary of all masked data for the response appears in the Data Masking Details dialog.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions. Einstein generative AI is available in Lightning Experience.

**When:** This feature is available starting the week of June 24, 2024.

## Work with Large Prompts

When a prompt is too large for the model to use, an error no longer occurs. Now, a summary is generated automatically in the Resolution panel. You can choose to keep using the summarized prompt or create a smaller prompt.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions. Einstein generative AI is available in Lightning Experience.

**When:** This feature is available starting the week of August 12, 2024.

## Retrieval Augmented Generation (RAG) in Data Cloud

Use Retrieval Augmented Generation (RAG) in Data Cloud to improve the relevance and value of LLM responses for users.

**IN THIS SECTION:**[Supercharge Einstein Generative AI with Retrieval Augmented Generation \(RAG\)](#)

Augment your prompts with Retrieval Augmented Generation (RAG) in Data Cloud. You can now augment prompt templates with unstructured content organized in the vector database in Data Cloud. Surface relevant information in your prompts from proprietary data, such as emails, meeting notes, service replies, article answers, and other types of unstructured content. By augmenting the prompt with accurate, current, and pertinent information, RAG improves the relevance and value of LLM responses for users.

[Vector Search and Hybrid Search in Data Cloud](#)

Connect unstructured data in Data Cloud and create search index configurations to prepare that data for vector and hybrid search. Vector search produces semantically aware query results while hybrid search combines vector search with keyword search to handle domain vocabulary and provide users with the most relevant results.

## Supercharge Einstein Generative AI with Retrieval Augmented Generation (RAG)

Augment your prompts with Retrieval Augmented Generation (RAG) in Data Cloud. You can now augment prompt templates with unstructured content organized in the vector database in Data Cloud. Surface relevant information in your prompts from proprietary data, such as emails, meeting notes, service replies, article answers, and other types of unstructured content. By augmenting the prompt with accurate, current, and pertinent information, RAG improves the relevance and value of LLM responses for users.

**Where:** Enterprise, Performance, and Unlimited Editions with the Einstein for Sales, Einstein for Platform, or Einstein for Service add-on. Einstein generative AI is available in Lightning Experience.

**When:** RAG in Data Cloud is available starting the week of August 19, 2024.

**SEE ALSO:**

[Salesforce Help: Retrieval Augmented Generation \(RAG\)](#)

## Vector Search and Hybrid Search in Data Cloud

Connect unstructured data in Data Cloud and create search index configurations to prepare that data for vector and hybrid search. Vector search produces semantically aware query results while hybrid search combines vector search with keyword search to handle domain vocabulary and provide users with the most relevant results.

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

**SEE ALSO:**

[Connect Unstructured Data in Data Cloud](#)

[Improve Search Accuracy with Hybrid Search \(Beta\)](#)

## Other Changes

Enjoy expanded Einstein generative AI support for locales, models, and more.

**IN THIS SECTION:**[Explore More Anthropic, Google, and OpenAI Models on the Einstein Platform](#)

We added support for Anthropic Claude 3 Haiku, Opus, and Sonnet and for Google Gemini 1.5 Pro and OpenAI GPT-4o on the Einstein Platform. Use Prompt Builder and Model Builder to build and test prompts with all our supported models.



### [Geo-Aware LLM Request Routing Is Available in the Einstein Generative AI Platform](#)

The Einstein generative AI platform now routes large language model (LLM) requests to the servers that are closest to where your Einstein generative AI platform instance is located. Geo-aware routing includes LLM API requests made by Einstein generative AI features that use the Einstein generative AI platform. If a model isn't available in a nearby region, the requests are routed to the US.

### [Get Optimized Einstein Responses with Einstein Data Prism](#)

With Einstein Data Prism, automatically ground your large language models (LLMs) and gain more accurate and relevant responses to utterances or prompts. Einstein Data Prism is automatically enabled in approved apps.

### [Manage your Models on the Supported Models Page](#)

Get more confident in managing your models by bookmarking the Large Language Model topic in Salesforce Help. View platform-supported models for Prompt Builder and Einstein Studio in one place. Identify model depreciation schedules, and learn the steps to migrate from one model to the next.

### [OpenAI GPT 3.5 Turbo 16k and Azure OpenAI GPT 3.5 Turbo 16k Shutdown Date Approaching](#)

OpenAI announced a shutdown date for GPT 3.5 Turbo 16k of 9/13/2024. Azure announced a shutdown date for Azure OpenAI GPT 3.5 Turbo 16k of 11/01/2024. After the shutdown date, you can't send requests to these models using Prompt Builder, Einstein Studio in Data Cloud, or your application. Requests are rerouted to GPT 3.5 Turbo (for GPT 3.5 Turbo 16k) and Azure OpenAI GPT 3.5 Turbo (for Azure OpenAI GPT 3.5 Turbo 16k). We recommend that you test your prompts, copilots, and applications on the new model as soon as possible, as expected responses can change.

### [Use the Starter Usage Type for Lower Cost Models](#)

Usage for Bring Your Own Large Language Models (BYO-LLMs) is now calculated with the Starter usage type. The new usage type reduces costs for customers who bring their own models. This usage type is automatically assigned upon model configuration.

### [Use Supported Locales in the Einstein Generative AI Platform](#)

The Einstein Generative AI Platform supports English, French, German, Italian, Japanese, and Spanish in all regions.

## Explore More Anthropic, Google, and OpenAI Models on the Einstein Platform

We added support for Anthropic Claude 3 Haiku, Opus, and Sonnet and for Google Gemini 1.5 Pro and OpenAI GPT-4o on the Einstein Platform. Use Prompt Builder and Model Builder to build and test prompts with all our supported models.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions with an Einstein for Sales, Einstein for Platform, or Einstein for Service add-on.

SEE ALSO:

[Salesforce Help: Large Language Model Support](#)

## Geo-Aware LLM Request Routing Is Available in the Einstein Generative AI Platform

The Einstein generative AI platform now routes large language model (LLM) requests to the servers that are closest to where your Einstein generative AI platform instance is located. Geo-aware routing includes LLM API requests made by Einstein generative AI features that use the Einstein generative AI platform. If a model isn't available in a nearby region, the requests are routed to the US.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions with an Einstein for Sales, Einstein for Platform, or Einstein for Service add-on.

**When:** Geo-aware LLM request routing is available starting in July 2024.

SEE ALSO:

[Salesforce Help: Einstein Generative AI Geo-Aware Routing](#)

## Get Optimized Einstein Responses with Einstein Data Prism

With Einstein Data Prism, automatically ground your large language models (LLMs) and gain more accurate and relevant responses to utterances or prompts. Einstein Data Prism is automatically enabled in approved apps.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions with an Einstein for Sales, Einstein for Platform, or Einstein for Service add-on.

**When:** This functionality is available starting September 2024.

## Manage your Models on the Supported Models Page

Get more confident in managing your models by bookmarking the Large Language Model topic in Salesforce Help. View platform-supported models for Prompt Builder and Einstein Studio in one place. Identify model depreciation schedules, and learn the steps to migrate from one model to the next.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions with an Einstein for Sales, Einstein for Platform, or Einstein for Service add-on.

**When:** This page is available the week of July 1, 2024.

SEE ALSO:

[Salesforce Help: Large Language Model Support](#)

## OpenAI GPT 3.5 Turbo 16k and Azure OpenAI GPT 3.5 Turbo 16k Shutdown Date Approaching

OpenAI announced a shutdown date for GPT 3.5 Turbo 16k of 9/13/2024. Azure announced a shutdown date for Azure OpenAI GPT 3.5 Turbo 16k of 11/01/2024. After the shutdown date, you can't send requests to these models using Prompt Builder, Einstein Studio in Data Cloud, or your application. Requests are rerouted to GPT 3.5 Turbo (for GPT 3.5 Turbo 16k) and Azure OpenAI GPT 3.5 Turbo (for Azure OpenAI GPT 3.5 Turbo 16k). We recommend that you test your prompts, copilots, and applications on the new model as soon as possible, as expected responses can change.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions with an Einstein for Sales, Einstein for Platform, or Einstein for Service add-on.

**When:** GPT 3.5 Turbo 16k is shutdown on 9/13/2024. Azure OpenAI GPT 3.5 Turbo 16k is shutdown on 11/01/2024.

SEE ALSO:

[Salesforce Help: Large Language Model Support](#)

## Use the Starter Usage Type for Lower Cost Models

Usage for Bring Your Own Large Language Models (BYO-LLMs) is now calculated with the Starter usage type. The new usage type reduces costs for customers who bring their own models. This usage type is automatically assigned upon model configuration.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions with an Einstein for Sales, Einstein for Platform, or Einstein for Service add-on. All Einstein 1 Editions, Marketing Cloud - Growth - Enterprise Edition, and Marketing Cloud - Growth - Unlimited Edition.

SEE ALSO:

[Einstein Generative AI Rate Card](#)

[Salesforce Help: Data Cloud Billable Usage Types](#)

[Salesforce Help: Einstein Usage](#)

[Einstein Generative AI Rate Card](#)

[Salesforce Help: Data Cloud Billable Usage Types](#)

## Use Supported Locales in the Einstein Generative AI Platform

The Einstein Generative AI Platform supports English, French, German, Italian, Japanese, and Spanish in all regions.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions with an Einstein for Sales, Einstein for Platform, or Einstein for Service add-on.

**How:** All features listed in [Einstein Generative AI Features](#) support English. Some features or their components can support additional languages.

SEE ALSO:

[Salesforce Help: Einstein Generative AI Supported Languages and Locales](#)

## Experience Cloud

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Customization is key, and Experience Cloud is here to help you deliver. Integrate enhanced LWR sites with Data Cloud to gain deeper insights into site visitor interactions. Elevate your site with new styling features for forms and buttons, streamlined search options, and increased control over the layout and spacing of your LWR sites. Improve your visitor login experience with a new integration framework for headless login and guest user identity flows. Stay productive on the go with a collection of updates to the Mobile Publisher app.

IN THIS SECTION:

[Prepare Your LWR and Aura Sites for Design System Architecture Updates](#)

To support future UI changes, we're modifying the internal implementation of Salesforce Lightning Design System (SLDS) styles, custom properties, and Salesforce Lightning components, including standard components in site templates. In Summer '24, we expect these changes to have little to no impact on your site customizations. However, if your site customizes Salesforce components by overriding their CSS, we recommend that you instead use supported techniques. Otherwise, your site can't adopt future product innovations of the UI without experiencing visual regressions.

[Upgrade Your App with the Latest Features from Mobile Publisher for Experience Cloud](#)

Protect your Mobile Publisher for Experience Cloud app with new security features, such as user opt-in biometric login (beta) and customizable mobile security policies. To make sure that your Android app meets Google's requirements for notifications, submit the required Firebase information. Prepare your users for the new device operating system minimums of Android 8 and iOS 16. Mobile Publisher Android apps distributed with the legacy Managed Public option no longer receive app updates in Summer '24 and later releases.

### [Aura and LWR Sites](#)

Harness the power of Data Cloud for your enhanced LWR site and gain a deeper understanding of your site visitors. Precisely style the layout, forms, and buttons on your LWR site with an abundance of new styling properties in Experience Builder. Use Search Manager, now generally available, to deliver relevant search results and create search configurations. Work more efficiently with the ability to see updates to dependent picklists in the Record Detail component. For your Aura, LWR, and Visualforce sites, use your sandbox environment to try upgraded record components based on the Lightning web components framework.

### [Site Performance](#)

Enjoy faster page load times and improved security and SEO for LWR sites in the Experience Delivery pilot. Public site pages built in Visualforce also load more quickly thanks to new caching behavior. Update references to your old force.com sites to ensure continued access.

### [Security and Sharing](#)

New features improve the login experience to your Experience Cloud sites. For off-platform apps, use the new integration framework to set up headless login and guest user identity flows. Control who can manage custom domains and URLs with a new, more targeted permission. Audit more settings for Visualforce sites in Site History, and switch to a single domain certificate if you're using a shared domain certificate for your Salesforce CDN.

## Prepare Your LWR and Aura Sites for Design System Architecture Updates

To support future UI changes, we're modifying the internal implementation of Salesforce Lightning Design System (SLDS) styles, custom properties, and Salesforce Lightning components, including standard components in site templates. In Summer '24, we expect these changes to have little to no impact on your site customizations. However, if your site customizes Salesforce components by overriding their CSS, we recommend that you instead use supported techniques. Otherwise, your site can't adopt future product innovations of the UI without experiencing visual regressions.

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

**How:** For information about supported and unsupported customization techniques, and how to update your site, see the [SLDS Architecture Updates FAQ](#).

SEE ALSO:

[Confirm Your Components Use Supported Design System Customizations](#)

## Upgrade Your App with the Latest Features from Mobile Publisher for Experience Cloud

Protect your Mobile Publisher for Experience Cloud app with new security features, such as user opt-in biometric login (beta) and customizable mobile security policies. To make sure that your Android app meets Google's requirements for notifications, submit the required Firebase information. Prepare your users for the new device operating system minimums of Android 8 and iOS 16. Mobile Publisher Android apps distributed with the legacy Managed Public option no longer receive app updates in Summer '24 and later releases.

**Where:** This change applies to apps created with Mobile Publisher for [Aura and LWR sites](#) in Enterprise, Performance, Unlimited, and Developer editions.

**How:** Learn about all the new Mobile Publisher features and announcements for your app in [Mobile Publisher Summer '24 release notes](#).

## Aura and LWR Sites

Harness the power of Data Cloud for your enhanced LWR site and gain a deeper understanding of your site visitors. Precisely style the layout, forms, and buttons on your LWR site with an abundance of new styling properties in Experience Builder. Use Search Manager, now generally available, to deliver relevant search results and create search configurations. Work more efficiently with the ability to see updates to dependent picklists in the Record Detail component. For your Aura, LWR, and Visualforce sites, use your sandbox environment to try upgraded record components based on the Lightning web components framework.

### IN THIS SECTION:

#### [Integrate with Data Cloud to Harness Site Data \(Generally Available\)](#)

Data is the new currency of business and an important tool for understanding how to best serve your customers. 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, connect Data Cloud to your enhanced LWR sites. After connecting to Data Cloud, your integration gathers user data from your site, such as the user's profile and site engagement. That information is then funneled to Data Cloud to build user profiles, create analytics, suggest individualized recommendations, and personalize your sites. When you turn on your Data Cloud integration, it connects your site to Data Cloud so that you can start tracking events as they occur on your site.

#### [Customize the Forms and Buttons on Your LWR Site with New Styling Features](#)

Show off your unique brand identity with a wealth of additional style properties for forms and buttons in Experience Builder. Specify the padding for input fields and buttons, the shape of checkboxes, the color of labels and input text, and more. Find these new style controls in the Theme section of Experience Builder.

#### [Polish the Layout of Your LWR Site for Every Screen Size](#)

Enjoy more flexibility and control over the layout and spacing of your LWR site, and ensure the best presentation of your content on any screen size. Arrange columns to be side by side or stacked, and specify the arrangement for desktop, tablet, and mobile devices. Vertically align the components across columns to the top, center, or bottom of the column. Refine page spacing and layout with the minimum height fields in the Section and Columns components.

#### [Configure Search Results Layouts with Search Manager \(Generally Available\)](#)

Now generally available, Search Manager makes search results from LWR sites more relevant and simplifies the process of creating search configurations. Configure filters to surface only the search results you need, and save search configurations that you can reuse across multiple sites. Users can apply additional filters to those configurations to further refine their searches.

#### [See Updates to Dependent Picklists While Editing Records in LWR Sites](#)

The Record Detail component in LWR sites now supports dependent picklist behavior. After site visitors change the value of a controlling field, they see updates to dependent field options and values. This support also includes compound fields such as Address when state and country/territory picklists is enabled. Previously, when site visitors edited Salesforce records in an LWR site, a change to a value in a controlling field didn't update the values of its dependent fields. Site visitors updated them manually.

#### [Enable or Disable a Modernized Record Experience in Aura Sites in Your Sandbox Environment](#)

Use upgraded records components, running on Lightning web component technology, in your Aura sites. For now, the changes are only available in Create Record Form, Record Banner, and Record Detail components in sandbox environments. Test the components in your sandbox, and see how they differ from your current Aura components. Your experience can help us fix any bugs that bubble up.

#### [Customize URLs for Accounts and Contacts to Improve SEO \(Beta\)](#)

Boost organic traffic to your enhanced LWR site with new URL configuration solutions that improve search engine optimization (SEO). Create SEO-friendly URL snippets, or "slugs," for your site's account and contact pages. A slug replaces the record ID in the URL with relevant and human-readable information, ensuring that search engines optimally surface your site's page. Previously, SEO-friendly URLs were available only for custom object pages in enhanced LWR sites and Product and Catalog pages in LWR Commerce sites.

### [Customize Your Einstein AI-Generated Search Answer Settings](#)

The AI-generated search answers on the Search results page of your site can be customized to better fit your brand. You can customize the title and description of your Einstein AI-Generated search answers on the Results Layout component.

### [Help Partners Draft Sales Emails Quickly](#)

Partners can now use Einstein generative AI to draft sales emails from Experience Cloud Aura sites in just a few quick seconds. After setting up Einstein Sales Emails for partners, partners get access to a Draft with Einstein button from the email composer for contacts and leads. Partners can also access any custom sales emails prompt templates that you create in Prompt Builder.

## Integrate with Data Cloud to Harness Site Data (Generally Available)

Data is the new currency of business and an important tool for understanding how to best serve your customers. 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, connect Data Cloud to your enhanced LWR sites. After connecting to Data Cloud, your integration gathers user data from your site, such as the user's profile and site engagement. That information is then funneled to Data Cloud to build user profiles, create analytics, suggest individualized recommendations, and personalize your sites. When you turn on your Data Cloud integration, it connects your site to Data Cloud so that you can start tracking events as they occur on your site.

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

**How:** To 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 select **Share site data with Data Cloud**. To start sending user engagement data, configure user consent options and publish your site.

## Customize the Forms and Buttons on Your LWR Site with New Styling Features

Show off your unique brand identity with a wealth of additional style properties for forms and buttons in Experience Builder. Specify the padding for input fields and buttons, the shape of checkboxes, the color of labels and input text, and more. Find these new style controls in the Theme section of Experience Builder.

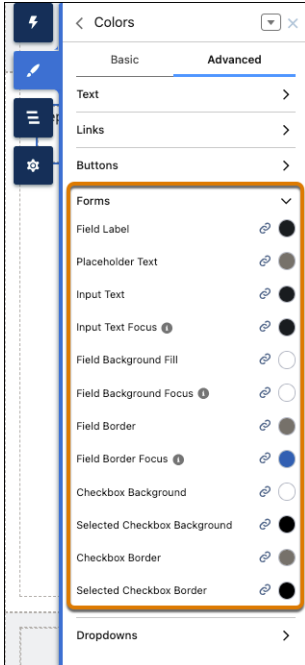
**Where:** This change applies to [LWR sites](#) accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

**How:** In Experience Builder, go to **Theme > Forms**, and find new properties to:

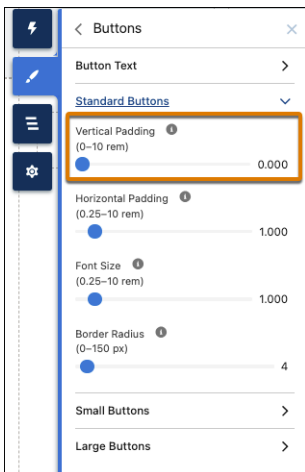
- Specify the padding within fields.
- Determine the font family, font size, text styles, and spacing for field labels, captions, and input text.
- Set the shape and thickness of the borders around fields and checkboxes.

In **Theme > Colors > Advanced**, find new properties in the Forms section to specify colors for:

- Field labels, placeholder text, and input text, including a property to set the color of in-focus text
- Backgrounds for fields and checkboxes, including properties to designate the colors for in-focus fields and selected checkboxes
- Borders around fields and checkboxes



In **Theme > Buttons**, control the space above and below the text inside the button.

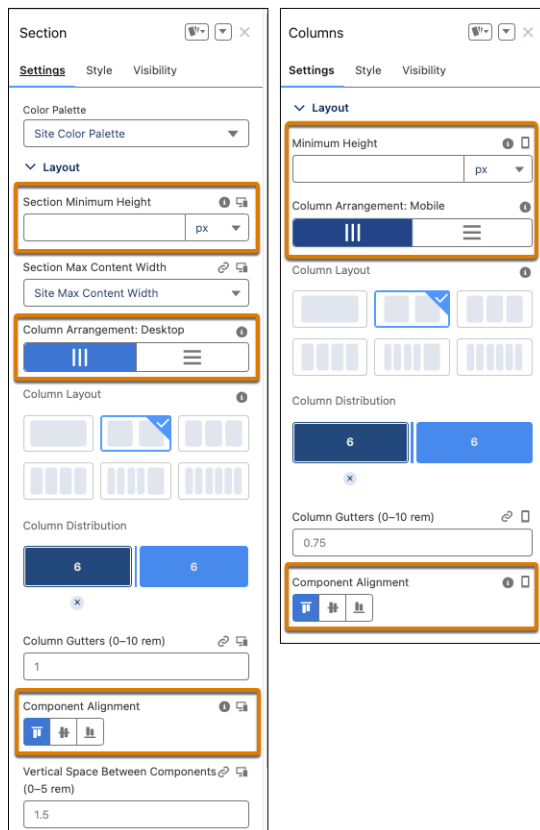


## Polish the Layout of Your LWR Site for Every Screen Size

Enjoy more flexibility and control over the layout and spacing of your LWR site, and ensure the best presentation of your content on any screen size. Arrange columns to be side by side or stacked, and specify the arrangement for desktop, tablet, and mobile devices. Vertically align the components across columns to the top, center, or bottom of the column. Refine page spacing and layout with the minimum height fields in the Section and Columns components.

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

**How:** In Experience Builder, on the Section or Columns property panel, adjust the Minimum Height and Component Alignment fields. To specify the column arrangement for a specific screen size, use the View Mode dropdown in the top navigation bar to select the Desktop, Mobile, or Tablet view, and adjust the Column Arrangement property.



## Configure Search Results Layouts with Search Manager (Generally Available)

Now generally available, Search Manager makes search results from LWR sites more relevant and simplifies the process of creating search configurations. Configure filters to surface only the search results you need, and save search configurations that you can reuse across multiple sites. Users can apply additional filters to those configurations to further refine their searches.

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

**How:** To update the Search Results page for the site you're on, from Experience Builder, go to the Results Layout component properties panel. From the Search Configuration dropdown list, select **Customize Search**. To search at a more granular level, click **Search Manager** and create a search configuration.

SEE ALSO:

[Salesforce Help: Create and Save Search Configurations \(can be outdated or unavailable during release preview\)](#)

## See Updates to Dependent Picklists While Editing Records in LWR Sites

The Record Detail component in LWR sites now supports dependent picklist behavior. After site visitors change the value of a controlling field, they see updates to dependent field options and values. This support also includes compound fields such as Address when state and country/territory picklists is enabled. Previously, when site visitors edited Salesforce records in an LWR site, a change to a value in a controlling field didn't update the values of its dependent fields. Site visitors updated them manually.

**Where:** This change applies to [LWR sites](#) accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions with active Experience Cloud licenses.



**How:** A controlling field can be a picklist or a checkbox, and a dependent field can be a picklist or multi-select picklist.

A warning appears at the bottom of the LWR site record edit window when there are controlling fields whose dependent field values can change. To see the list of controlling fields and their dependent fields, click or tap **Learn more**.

SEE ALSO:

[Salesforce Help: Standard Components for the Build Your Own \(LWR\) Template \(can be outdated or unavailable during release preview\)](#)

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

[Salesforce Help: Configure State and Country/Territory Picklists \(can be outdated or unavailable during release preview\)](#)

## Enable or Disable a Modernized Record Experience in Aura Sites in Your Sandbox Environment

Use upgraded records components, running on Lightning web component technology, in your Aura sites. For now, the changes are only available in Create Record Form, Record Banner, and Record Detail components in sandbox environments. Test the components in your sandbox, 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.


**How:** In **Setup > Digital Experiences**, enable or disable **Use Lightning web components on your record pages in Aura sites**. When this setting is enabled, the Create Record Form, Record Banner, and Record Detail components in sandboxes see these changes:

- Buttons are center-aligned. Previously, they were right-aligned.
- Text in the window is indented compared to the title. Previously, the text and title were inline with one another.
- If a form includes required fields, there's now an explanation that an asterisk connotes a required field. Previously, there was no explanation.
- If a required field is left blank, users now see a red outline around the required field and an inline error telling them to complete the field.

## Customize URLs for Accounts and Contacts to Improve SEO (Beta)

Boost organic traffic to your enhanced LWR site with new URL configuration solutions that improve search engine optimization (SEO). Create SEO-friendly URL snippets, or "slugs," for your site's account and contact pages. A slug replaces the record ID in the URL with relevant and human-readable information, ensuring that search engines optimally surface your site's page. Previously, SEO-friendly URLs were available only for custom object pages in enhanced LWR sites and Product and Catalog pages in LWR Commerce 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:** Use the `objectRelatedUrl` object to upload SEO-friendly URL slugs in the Salesforce Platform APIs that you typically use.

## Customize Your Einstein AI-Generated Search Answer Settings

The AI-generated search answers on the Search results page of your site can be customized to better fit your brand. You can customize the title and description of your Einstein AI-Generated search answers on the Results Layout component.

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

## Help Partners Draft Sales Emails Quickly

Partners can now use Einstein generative AI to draft sales emails from Experience Cloud Aura sites in just a few quick seconds. After setting up Einstein Sales Emails for partners, partners get access to a Draft with Einstein button from the email composer for contacts and leads. Partners can also access any custom sales emails prompt templates that you create in Prompt Builder.

**Where:** This change applies to [Aura sites](#) accessed through Lightning Experience in Unlimited editions. A [PRM add-on license](#) and an Einstein for Sales add-on license are required for each partner user.

SEE ALSO:

[Help Partners Send Personalized Sales Emails Fast](#)

## Site Performance

Enjoy faster page load times and improved security and SEO for LWR sites in the Experience Delivery pilot. Public site pages built in Visualforce also load more quickly thanks to new caching behavior. Update references to your old force.com sites to ensure continued access.

IN THIS SECTION:

[Improve the Performance and Scalability of LWR Sites 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. Experience Delivery includes some changes since the previous release.

[Update References to Your Force.com Site URLs](#)

Ensure continued access to your sites when the temporary redirection of legacy Salesforce domains ends, starting in September 2024 for production orgs. 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.


[Load Cached Visualforce Site Pages Faster](#)

To improve page load times, the caching behavior is updated for public site pages built in Visualforce. When an unauthenticated user visits a login-enabled site and the Visualforce page is cached, the cached version exists on the proxy server and the end user's web browser. Previously, the page was cached only on the proxy server.

## Improve the Performance and Scalability of LWR Sites 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. Experience Delivery includes some changes since the previous release.

**Where:** This change applies to [LWR sites](#) accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, and Unlimited editions. Developer Edition isn't supported.

 **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.

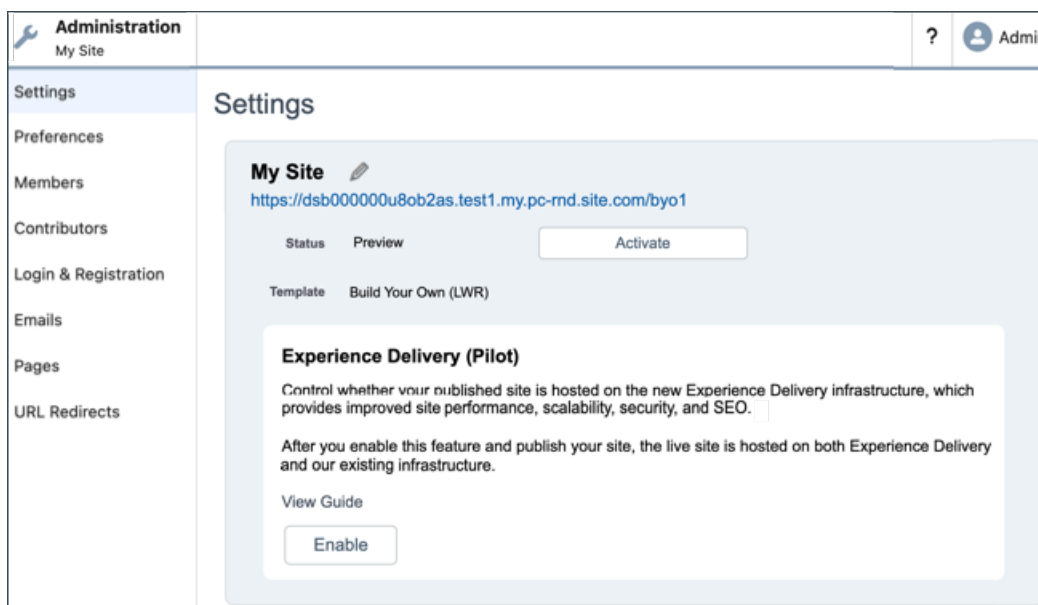
Since the previous release, we added support for:

- Enhanced domains, meaning that custom domains are optional.
- Custom URLs with path prefixes, such as `/help` and `/support`. Previously, custom URLs could contain only a root URL.

**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
- 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

Ensure continued access to your sites when the temporary redirection of legacy Salesforce domains ends, starting in September 2024 for production orgs. 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](#)

## Load Cached Visualforce Site Pages Faster

To improve page load times, the caching behavior is updated for public site pages built in Visualforce. When an unauthenticated user visits a login-enabled site and the Visualforce page is cached, the cached version exists on the proxy server and the end user's web browser. Previously, the page was cached only on the proxy server.

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

SEE ALSO:

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

## Security and Sharing

New features improve the login experience to your Experience Cloud sites. For off-platform apps, use the new integration framework to set up headless login and guest user identity flows. Control who can manage custom domains and URLs with a new, more targeted permission. Audit more settings for Visualforce sites in Site History, and switch to a single domain certificate if you're using a shared domain certificate for your Salesforce CDN.

IN THIS SECTION:

### [Switch to a Single Domain Certificate for Your Salesforce Content Delivery Network](#)

Switch to a single domain certificate if you're using a shared domain certificate for your Salesforce content delivery network (CDN). To comply with the latest security updates, we're retiring shared domain certificates. When this change is enforced, shared domain certificates are updated to non-HTTPS, which isn't as secure as the single domain certificate. Switching from a shared certificate to a single domain certificate has no downtime.

### [Salesforce Content Delivery Network Is Off by Default for Government Cloud Organizations](#)

For compliance reasons, some Government Cloud organizations can't use a content delivery network (CDN). The Salesforce CDN is turned off by default for all new sites created from Government Cloud orgs that have enabled Enhanced Domains.

### [Refine Your Experience Cloud Site with New Customer Identity Features](#)

Get more control over your identity verification process. Give users uninterrupted access across custom apps and Salesforce UIs by bridging an existing access token into a new UI session. Enable Embedded Login.

### [Try a More Flexible Integration Framework for Headless Identity Flows](#)

The External Client App framework, a new generation of Connected Apps that's easier to package and distribute, now supports all variations of the headless Authorization Code and Credentials Flow. Use this improved framework to set up headless login, passwordless login, and guest user identity flows in an off-platform app.

### [Assign a New User Permission for Custom Domain Management](#)

To provide more precise permissions management, assign the new Custom Domain Management user permission for managing custom domains and custom URLs. With a custom domain, you provide your users a branded experience by serving your Experience Cloud sites on a domain that you own, such as <https://www.example.com>.

### [Track More Visualforce Site Changes](#)

Audit more settings for your Visualforce sites in the Site History related list.

## Switch to a Single Domain Certificate for Your Salesforce Content Delivery Network

Switch to a single domain certificate if you're using a shared domain certificate for your Salesforce content delivery network (CDN). To comply with the latest security updates, we're retiring shared domain certificates. When this change is enforced, shared domain certificates are updated to non-HTTPS, which isn't as secure as the single domain certificate. Switching from a shared certificate to a single domain certificate has no downtime.

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

**When:** Salesforce enforces this update in Spring '25.

**How:** From Setup, in the Quick Find box, enter *Domains*, and select **Domains**. For each domain with a shared certificate, select the domain and click **Edit a Domain**. To update your certificate selection for the CDN, select **Single certificate for Content Delivery network (CDN)**.



**Note:** You can only change the domain from shared to single domain certificate in a production org.

## Salesforce Content Delivery Network Is Off by Default for Government Cloud Organizations

For compliance reasons, some Government Cloud organizations can't use a content delivery network (CDN). The Salesforce CDN is turned off by default for all new sites created from Government Cloud orgs that have enabled Enhanced Domains.

**Where:** This change applies to Lightning Experience and Salesforce Classic (not available in all orgs) in Professional, Enterprise, Performance, Unlimited, and Developer editions.

**How:** To turn on the CDN, from Setup, in the Quick Find box, enter *My Domain*, and then select **My Domain**. Then, in the Routing section, select **Use Content Delivery Network (CDN) by default when enhanced domains are enabled for Experience Cloud sites**.

## Refine Your Experience Cloud Site with New Customer Identity Features

Get more control over your identity verification process. Give users uninterrupted access across custom apps and Salesforce UIs by bridging an existing access token into a new UI session. Enable Embedded Login.

**Where:** These changes apply to [LWR, Aura, and Visualforce sites](#) accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

**How:** For more information about these changes, see these release notes.

- [Use a Custom One-Time Password Provider \(Beta\)](#)
- [Brand the Welcome Email for Passwordless Registration](#)
- [Integrate Custom App Experiences with the Salesforce UI](#)
- [Enable Embedded Login](#)

## Try a More Flexible Integration Framework for Headless Identity Flows

The External Client App framework, a new generation of Connected Apps that's easier to package and distribute, now supports all variations of the headless Authorization Code and Credentials Flow. Use this improved framework to set up headless login, passwordless login, and guest user identity flows in an off-platform app.

**Where:** These changes apply to [LWR, Aura, and Visualforce sites](#) accessed through Lightning Experience and Salesforce Classic in Enterprise, Unlimited, and Developer editions.

SEE ALSO:

[Use More OAuth Features with External Client Apps](#)

## Assign a New User Permission for Custom Domain Management

To provide more precise permissions management, assign the new Custom Domain Management user permission for managing custom domains and custom URLs. With a custom domain, you provide your users a branded experience by serving your Experience Cloud sites on a domain that you own, such as <https://www.example.com>.

**Where:** This change applies to [Aura, LWR, and Visualforce sites](#) accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, and Unlimited editions. Also available in Professional Edition with Marketing Cloud Account Engagement (Pardot).

SEE ALSO:

[Grant Specific Permission to Manage Custom Domains](#)

## Track More Visualforce Site Changes

Audit more settings for your Visualforce sites in the Site History related list.

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

SEE ALSO:

[Audit More Changes to Salesforce Sites and Visualforce Sites](#)

## Field Service

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

### IN THIS SECTION:

#### [Field 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.

## Field Service Einstein

Discover innovative, AI-based features to help your teams deliver exceptional service.

### IN THIS SECTION:

#### [Get Started with Einstein for Field Service](#)

Give all Field Service workers access to Field Service features in Einstein by assigning the Einstein Field Service User permission set.

#### [Customize the Pre-Work Brief with Prompt Builder](#)

Access the Pre-Work Brief template in the Prompt Builder and modify the prompt according to your business needs. Mobile workers can then see the customized AI-generated brief that tells them everything they need to know about their upcoming work.

## Get Started with Einstein for Field Service

Give all Field Service workers access to Field Service features in Einstein by assigning the Einstein Field Service User permission set.

**Where:** This change applies to Lightning Experience in the Einstein 1 Field Service Edition with the Field Service Managed Package installed. Einstein features for the Field Service mobile app are available on Android and iOS. Setup for Einstein Copilot is available on the desktop site.

The Einstein Field Service User permission set is included in the Einstein 1 Field Service Edition. If the permission set doesn't appear, ask your Salesforce account executive for help.

### SEE ALSO:

[Einstein Features](#)

## Customize the Pre-Work Brief with Prompt Builder

Access the Pre-Work Brief template in the Prompt Builder and modify the prompt according to your business needs. Mobile workers can then see the customized AI-generated brief that tells them everything they need to know about their upcoming work.

**Where:** This change applies to 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.

**When:** The Pre-Work Brief template in the Prompt Builder is available later in Summer '24.

SEE ALSO:

[Salesforce Help: Set Up Pre-Work Brief \(can be outdated or unavailable during release preview\)](#)

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

[Einstein Features \(can be outdated or unavailable during release preview\)](#)

## Field Service Resource Management

Explore the latest features to help dispatchers create, manage, and optimize your team's schedule.

IN THIS SECTION:

[Enhanced Scheduling and Optimization](#)

Benefit from advanced features and better schedule quality with Enhanced Scheduling and Optimization.

[Work Capacity](#)

Reserve workforce availability based on dynamic business priorities using Work Capacity.

## Enhanced Scheduling and Optimization

Benefit from advanced features and better schedule quality with Enhanced Scheduling and Optimization.

IN THIS SECTION:

[Prevent Overlapping Optimization Runs](#)

Enhance operational stability and reduce your optimization partial completion rate by preventing optimization requests from running on overlapping datasets. Check for optimization requests being processed for the same territory and time horizon and then block any identical or overlapping requests. For example, a dispatcher activates resource schedule optimization for a resource that's already part of a dataset optimized with in-day optimization. And, avoid setting up overlapping enhanced optimization requests when using enhanced scheduled jobs. Previously, you could create an enhanced scheduled job with overlapping time periods within the same job.

[Adjust Service Appointments with Visiting Hours to Your Local Time Zone](#)

When a work order has visiting hours, you can now apply the time zone of the related service appointment's service territory by using the visiting hours time zone setting. Previously, when you scheduled appointments with visiting hours, the time zone of the Visiting Hours object was used. This setting allows more flexibility when you're working across multiple time zones by automatically adjusting them to the service appointments' local time zone.

[Enhance Service Coverage and Boost Resource Productivity by Scheduling Across Multiple Time Zones](#)

Increase resource utilization and reduce response time by enabling your resources to service multiple time zones in one shift. Set operating hours on secondary service territories in various time zones to maximize resource availability. For example, a mobile worker can service adjacent cities in different time zones. Or, a service resource can provide technical assistance from a call center to New York, Tel Aviv, London, and Sydney. Previously, with Enhanced Scheduling and Optimization, secondary service territory memberships with different time zones on operating hours were ignored.



### [Benefit from Smoother Scheduling and Optimization Services for Overlapping Travel Time Scenarios](#)

Experience improved operational efficiency by minimizing disruptive failures in scheduling and optimization services for various overlapping travel time use cases. Ensure uninterrupted business operations with Enhanced Scheduling and Optimization when the travel time spans multiple shifts or operating hours. And, schedule and optimize service appointments even when the maximum travel time at the expense of the resource exceeds the time between shifts. Previously, these scenarios resulted in errors that reduced service continuity.

### [Get More Clarity and Resolve Issues Faster with Improved Error Messages](#)

Identify enhanced scheduling and optimization issues and their root cause with detailed error messages that promote self-sufficient troubleshooting. Discover which entities to fix with Object IDs, and get actionable guidance. Access additional details and review potential solutions on a dedicated page in Salesforce Help.

### [Trace Who Triggered an Optimization in the Optimization Request](#)

Let service managers easily identify the user who initiated the global, in-day, or resource schedule optimization request or configured the scheduled job. This functionality facilitates system tracking, troubleshooting, and traceability. The Owner field in the optimization request now shows the user's name, providing insights into scheduling and optimization actions. Previously, all actions and triggering services were attributed to the platform integration user.

### [Let Dispatchers Easily Set Criteria for Schedule Optimization](#)

Help dispatchers make the right choice with fewer options in the Appointment Optimization Criteria field. You can customize this field to show only those values that are relevant to your dispatchers. And, let your dispatchers know about the renamed and redesigned Optimize window fields for enhanced usability. For example, previously the Appointment Optimization Criteria field was called Filter service appointments by.

### [Review the History of Scheduling and Optimization Requests with Activity Reports \(Beta\)](#)

Use Activity Reports to get information on scheduling and optimization requests that you run. You can generate an activity report for a specific request type and easily identify whether it succeeded or failed. For example, generate a report on a Global Optimization request that failed. The report output details the reasons for the failure, allowing you to take action and troubleshoot the issue quickly.

### [Access Optimization Request Files on Your Own \(Beta\)](#)

Use Optimization Request Files to retrieve the request and response files of an optimization request. Review the files in a JSON format to find out what happened to a specific request and quickly resolve related issues. Previously, you had to open a Support case and wait to get the files, which delayed the troubleshooting process.

### [Keep Important Appointments Scheduled During Optimization \(Beta\)](#)

Safeguard important service appointments, such as those with customer commitments, by preventing them from being dropped from the schedule during global and in-day optimization. Define which appointments to keep scheduled by using Keep Scheduled Criteria. For example, ensure emergency appointments remain scheduled. During optimization these appointments can move to a different resource or time within the SLA. Previously, you could only pin appointments, limiting the ability to create the most optimal schedule. You can also keep appointments scheduled via API by using the updated Optimize global Apex method, which is helpful when you want to schedule optimization runs and aren't relying on manual actions.

### [Create More Precise Travel Time Estimations by Including a Buffer \(Beta\)](#)

Align travel time estimations with your company's business needs by adding a buffer to the estimated travel time. This buffer accounts for additional arrival time considerations, such as parking, for improved travel time accuracy.

### [Get More Accurate Scheduling Recommendations with Appointment Insights \(Beta\)](#)

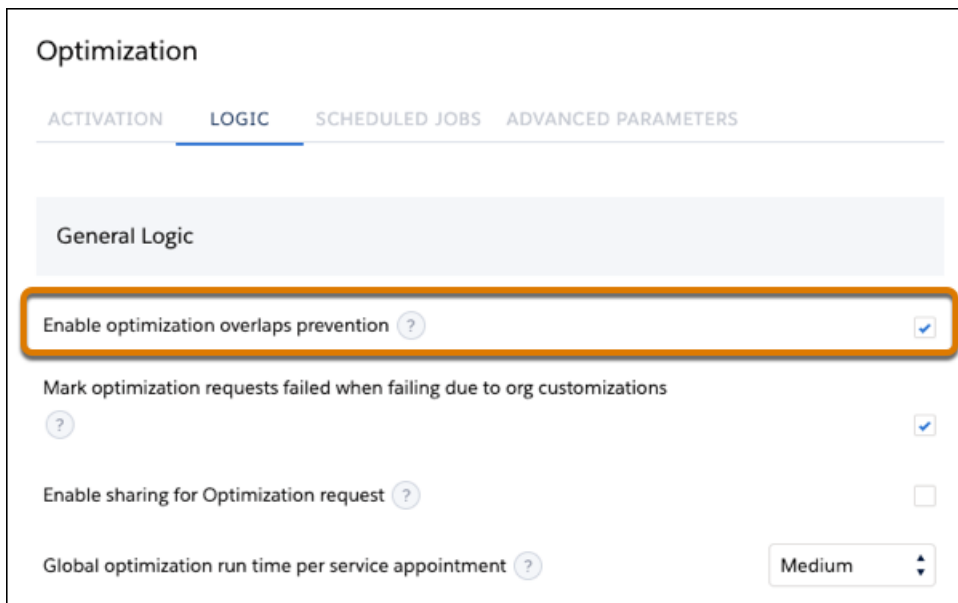
Appointment Insights now supports more work rules, such as the Working Territories and the Extended Match rules, to help you improve the scheduling of service appointments. This additional support provides more accurate information about why appointments can't be scheduled and what changes you can make to qualify more time slots and candidates for scheduling.

## Prevent Overlapping Optimization Runs

Enhance operational stability and reduce your optimization partial completion rate by preventing optimization requests from running on overlapping datasets. Check for optimization requests being processed for the same territory and time horizon and then block any identical or overlapping requests. For example, a dispatcher activates resource schedule optimization for a resource that's already part of a dataset optimized with in-day optimization. And, avoid setting up overlapping enhanced optimization requests when using enhanced scheduled jobs. Previously, you could create an enhanced scheduled job with overlapping time periods within the same job.

**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, go to Field Service Settings. Select **Optimization**, and then select the Logic tab. Check that Enable optimization overlaps prevention is enabled (default).



For enhanced scheduled jobs, go to the Scheduled Jobs tab and then select the General tab.

The screenshot shows the 'Optimization' configuration page in Salesforce. The page has tabs for 'ACTIVATION', 'LOGIC', 'SCHEDULED JOBS', and 'ADVANCED PARAMETERS'. The 'SCHEDULED JOBS' tab is active. There are 'New Job' and 'Edit' buttons. The main content area is for 'Optimization LA', which is currently 'Inactive' and has an 'Enhanced' status. Below this, there are tabs for 'General', 'Territory', and 'Schedule'. A red warning banner at the top of the configuration area states: 'You have overlapping time periods.' Below the warning, there are two 'Time Periods' sections. Each section has 'From Day' and 'To Day' input fields. The first section has 'From Day' set to '1' and 'To Day' set to '7', both with a red 'Overlapping' label below them. The second section has 'From Day' set to '4' and 'To Day' set to '10', also with a red 'Overlapping' label. To the right of these sections are settings for 'Scheduling Policy' (set to 'Customer First'), 'Appointment Optimization Criteria' (set to 'None'), and 'Keep Scheduled Criteria (Beta)\*' (with 'Use the default selection' selected). There is also a 'Notification Recipient' field.

SEE ALSO:

[Salesforce Help: Manage Optimization Conflicts \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Manage Scheduled Jobs in Field Service \(can be outdated or unavailable during release preview\)](#)

## Adjust Service Appointments with Visiting Hours to Your Local Time Zone

When a work order has visiting hours, you can now apply the time zone of the related service appointment's service territory by using the visiting hours time zone setting. Previously, when you scheduled appointments with visiting hours, the time zone of the Visiting Hours object was used. This setting allows more flexibility when you're working across multiple time zones by automatically adjusting them to the service appointments' local time zone.

**Where:** This change applies to Lightning Experience and Salesforce Classic in Enterprise, Unlimited, and Developer editions with the Field Service managed package installed.

**How:** In Setup, go to Field Service Settings and verify that Field Service Enhanced Scheduling and Optimization is enabled. In the Field Service Admin app, click the Field Service Settings tab and select **Scheduling**. Then, under General Logic, deselect **Use the Visiting Hours object's time zone when an appointment has visiting hours**.

SEE ALSO:

[Salesforce Help: Work Rule Type: Service Appointment Visiting Hours \(can be outdated or unavailable during release preview\)](#)

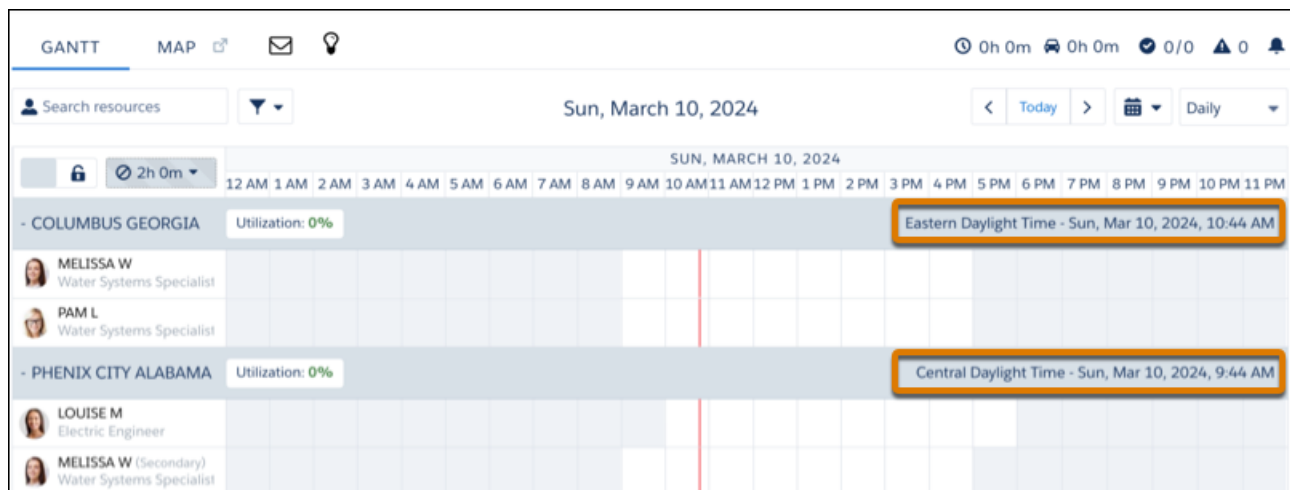
## Enhance Service Coverage and Boost Resource Productivity by Scheduling Across Multiple Time Zones

Increase resource utilization and reduce response time by enabling your resources to service multiple time zones in one shift. Set operating hours on secondary service territories in various time zones to maximize resource availability. For example, a mobile worker can service adjacent cities in different time zones. Or, a service resource can provide technical assistance from a call center to New York, Tel Aviv, London, and Sydney. Previously, with Enhanced Scheduling and Optimization, secondary service territory memberships with different time zones on operating hours were ignored.

**Where:** This feature is available in Lightning Experience and Salesforce Classic in Enterprise, Unlimited, and Developer editions with the Field Service managed package installed.

**Why:** Here's an example of how this change enhances service efficiency and maximizes your mobile workers' productivity. Melissa has Columbus, GA, as her primary service territory with 9:00 AM to 5:00 PM operating hours and has a secondary service territory Phenix City, AL, also with 9:00 AM to 5:00 PM operating hours. Columbus, GA is in a time zone that's 1 hour ahead of Phenix City, AL. Melissa's availability is calculated from each respective territory's operating hours such that Melissa is available to work for 9 hours overall. During the first hour of her shift, Melissa services only Columbus, GA, while for the next 7 hours, she covers both territories. During the last hour of her day, Melissa services only Phenix City, AL. Previously, Melissa couldn't service both territories if operating hours existed on Phenix City, AL, and her availability there was ignored.

**How:** In Setup, go to Field Service Settings and verify that Field Service Enhanced Scheduling and Optimization is enabled. Define Operating Hours on secondary service territory memberships in different time zones.



SEE ALSO:

[Salesforce Help: Guidelines for Creating Operating Hours for Field Service \(can be outdated or unavailable during release preview\)](#)

## Benefit from Smoother Scheduling and Optimization Services for Overlapping Travel Time Scenarios

Experience improved operational efficiency by minimizing disruptive failures in scheduling and optimization services for various overlapping travel time use cases. Ensure uninterrupted business operations with Enhanced Scheduling and Optimization when the travel time spans multiple shifts or operating hours. And, schedule and optimize service appointments even when the maximum travel time at the expense of the resource exceeds the time between shifts. Previously, these scenarios resulted in errors that reduced service continuity.

**Where:** This change applies to Lightning Experience and Salesforce Classic in Enterprise, Unlimited, and Developer editions with the Field Service managed package installed.

**How:** In Setup, go to Field Service Settings and verify that Field Service Enhanced Scheduling and Optimization is enabled. Schedule or optimize a job with a long travel time that spans multiple shifts or operating hours.

SEE ALSO:

[Salesforce Help: Limits and Limitations for Enhanced Scheduling and Optimization \(can be outdated or unavailable during release preview\)](#)

## Get More Clarity and Resolve Issues Faster with Improved Error Messages

Identify enhanced scheduling and optimization issues and their root cause with detailed error messages that promote self-sufficient troubleshooting. Discover which entities to fix with Object IDs, and get actionable guidance. Access additional details and review potential solutions on a dedicated page in Salesforce Help.

**Where:** This change applies to Lightning Experience and Salesforce Classic in Enterprise, Unlimited, and Developer editions with the Field Service managed package installed.

**How:** In Setup, go to Field Service Settings and verify that Field Service Enhanced Scheduling and Optimization is enabled.

SEE ALSO:

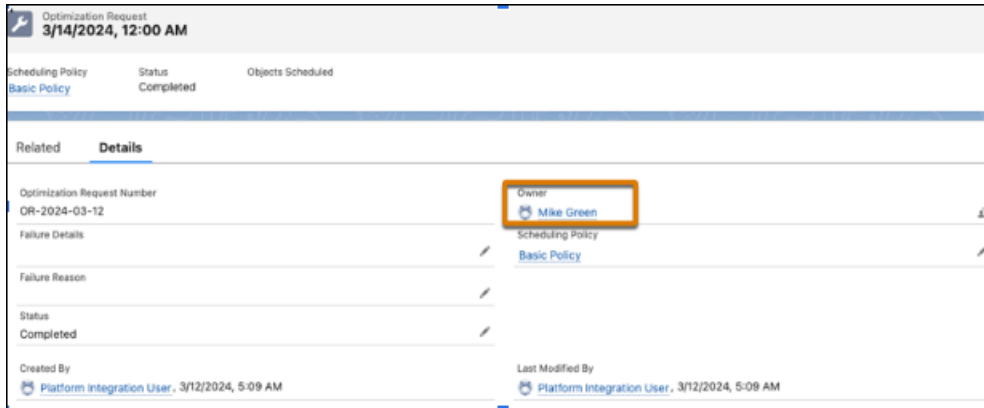
[Salesforce Help: Field Service Enhanced Scheduling and Optimization Error Messages \(can be outdated or unavailable during release preview\)](#)

## Trace Who Triggered an Optimization in the Optimization Request

Let service managers easily identify the user who initiated the global, in-day, or resource schedule optimization request or configured the scheduled job. This functionality facilitates system tracking, troubleshooting, and traceability. The Owner field in the optimization request now shows the user's name, providing insights into scheduling and optimization actions. Previously, all actions and triggering services were attributed to the platform integration user.

**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. Optimize the team's schedule by using scheduled jobs from Field Service Settings in the Field Service Admin app. Or, dispatchers can run optimization manually from the dispatcher console by using the Optimize option. Then service managers view the optimization request details.



## SEE ALSO:

[Salesforce Help: Manage Scheduled Jobs in Field Service \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Optimize Your Schedule from the Field Service Dispatcher Console \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Monitor Field Service Schedule Optimization Requests \(can be outdated or unavailable during release preview\)](#)

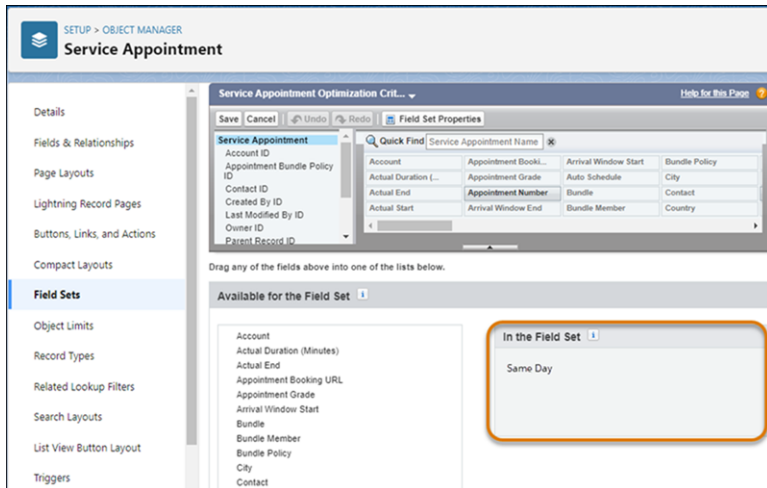
## Let Dispatchers Easily Set Criteria for Schedule Optimization

Help dispatchers make the right choice with fewer options in the Appointment Optimization Criteria field. You can customize this field to show only those values that are relevant to your dispatchers. And, let your dispatchers know about the renamed and redesigned Optimize window fields for enhanced usability. For example, previously the Appointment Optimization Criteria field was called Filter service appointments by.

**Where:** This change applies to Lightning Experience and Salesforce Classic in Enterprise, Unlimited, and Developer editions with the Field Service managed package installed.

**How:** In Setup, go to Field Service Settings and verify that Field Service Enhanced Scheduling and Optimization is enabled. From the object management settings for service appointments, go to Field Sets. Select **Service Appointment Optimization Criteria**, and define the values for this field set.

These values are shown in the Optimize window accessed from the dispatcher console.



## SEE ALSO:

[Salesforce Help: Optimize Your Schedule from the Field Service Dispatcher Console](#) (can be outdated or unavailable during release preview)

[Salesforce Help: Customize the Dispatcher Console with Field Sets](#) (can be outdated or unavailable during release preview)

## Review the History of Scheduling and Optimization Requests with Activity Reports (Beta)

Use Activity Reports to get information on scheduling and optimization requests that you run. You can generate an activity report for a specific request type and easily identify whether it succeeded or failed. For example, generate a report on a Global Optimization request that failed. The report output details the reasons for the failure, allowing you to take action and troubleshoot the issue quickly.

**Where:** This feature is available in Lightning Experience in Enterprise, Unlimited, and Developer editions with the Field Service managed package installed.



**Note:** This feature is a Beta Service. 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, click the Field Service Settings tab and select **Scheduling**. Then, enable activity reports under General Logic. To access activity reports, from the App Launcher, find and select **Optimization Center**.

**Optimization Center**

**Activity Reports (Beta)\***

Generate reports to review the history of scheduling and optimization requests.

**\*Date and Time**

Current date Last 3 Hours

Date range

Start Time: 4/6/2024 11:41 PM

End Time: 4/7/2024 2:41 AM

**\*Request Type**

All Types: Select All

Selected Types: Clear All

Book Appointment

Drag And Drop

Get Candidates

**\*Status**

Succeeded

Failed

**Generate Report**

**Generated Reports** Last Updated at 2:46 AM

| File Name                             | Created On               |
|---------------------------------------|--------------------------|
| SFS_Activity_Report_2024_04_03_142928 | Apr 3, 2024, 7:29:28 AM  |
| SFS_Activity_Report_2024_04_03_142757 | Apr 3, 2024, 7:27:57 AM  |
| SFS_Activity_Report_2024_04_01_072244 | Apr 1, 2024, 12:22:44 AM |


## SEE ALSO:

[Salesforce Help: Review the History of Scheduling and Optimization Requests with Activity Reports \(Beta\) \(can be outdated or unavailable during release preview\)](#)

## Access Optimization Request Files on Your Own (Beta)

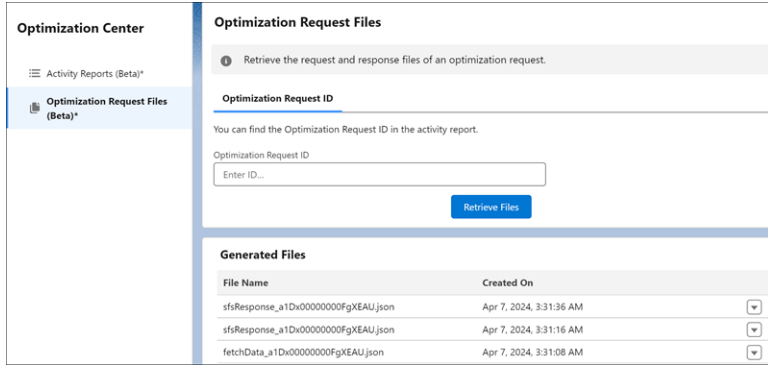
Use Optimization Request Files to retrieve the request and response files of an optimization request. Review the files in a JSON format to find out what happened to a specific request and quickly resolve related issues. Previously, you had to open a Support case and wait to get the files, which delayed the troubleshooting process.

**Where:** This feature is available in Lightning Experience in Enterprise, Unlimited, and Developer editions with the Field Service managed package installed.

 **Note:** This feature is a Beta Service. 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, click the Field Service Settings tab and select **Scheduling**. Then, enable optimization request files under General Logic. To access optimization request files, from the App Launcher, find and select **Optimization Center**.






SEE ALSO:

[Salesforce Help: Access Optimization Request Files \(Beta\) \(can be outdated or unavailable during release preview\)](#)

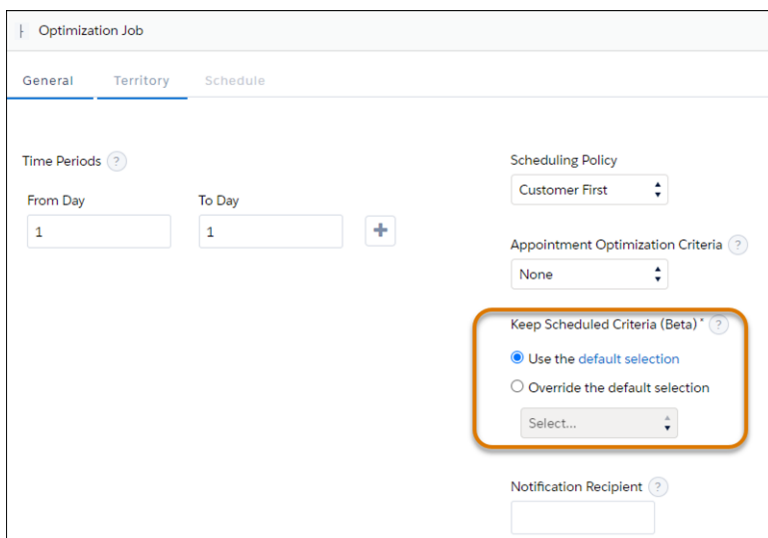
### Keep Important Appointments Scheduled During Optimization (Beta)

Safeguard important service appointments, such as those with customer commitments, by preventing them from being dropped from the schedule during global and in-day optimization. Define which appointments to keep scheduled by using Keep Scheduled Criteria. For example, ensure emergency appointments remain scheduled. During optimization these appointments can move to a different resource or time within the SLA. Previously, you could only pin appointments, limiting the ability to create the most optimal schedule. You can also keep appointments scheduled via API by using the updated Optimize global Apex method, which is helpful when you want to schedule optimization runs and aren't relying on manual actions.

**Where:** This feature is available in Lightning Experience and Salesforce Classic in Enterprise, Unlimited, and Developer editions with the Field Service manager 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, click **Field Service Settings**. Under Optimization, in the Scheduled Jobs tab, configure Keep Schedule Criteria.



Then under Optimization, in the Logic tab, you can define a default value to show for this setting. Then, enable the Include Keep Scheduled in Optimize Window custom permission the relevant permission set to show this field in the Optimize window accessed from the dispatcher console.

The screenshot shows the 'Optimize' window with the following settings:

- Service Territories: Select...
- Start Date: Feb 8, 2024
- End Date: Feb 8, 2024
- Optimized service appointments:
  - Only unscheduled
  - Scheduled and unscheduled
- Scheduling Policy: Soft Boundaries
- Appointment Optimization Criteria: Same Day
- Keep Scheduled Criteria (Beta): Emergency (highlighted with an orange box)

An 'Optimize' button is located at the bottom right of the window.

Alternatively, use the new `KeepApptScheduled` property with the Optimize global Apex method, to define the value of the designated Boolean field within the Service Appointment object. For example, define `IsEmergency` to ensure all appointments with this property stay scheduled during optimization.

#### SEE ALSO:

[Salesforce Help: Optimize Your Schedule from the Field Service Dispatcher Console](#) (can be outdated or unavailable during release preview)

[Salesforce Help: Manage Scheduled Jobs in Field Service](#) (can be outdated or unavailable during release preview)


[Salesforce Help: Set Custom Permissions for Field Service](#) (can be outdated or unavailable during release preview)

[Field Service Developer Guide: OAASRequest Class](#) (can be outdated or unavailable during release preview)

## Create More Precise Travel Time Estimations by Including a Buffer (Beta)

Align travel time estimations with your company's business needs by adding a buffer to the estimated travel time. This buffer accounts for additional arrival time considerations, such as parking, for improved travel time accuracy.

**Where:** This feature is available in Lightning Experience in Enterprise, Unlimited, and Developer editions with the Field Service managed package installed.

 **Note:** This feature is a Beta Service. 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, select **Scheduling**, and then select **Routing**. Enter the number of minutes for the buffer.

The screenshot shows the 'Scheduling' setup page with the 'ROUTING' tab selected. The page includes a 'Register to the Street-Level Routing service' button, several toggle switches for 'Enable Street Level Routing', 'Enable Point-to-Point Predictive Routing', and 'Calculate travel and breaks', and dropdown menus for 'Travel speed unit' (set to MPH) and 'Default travel speed' (set to 15). The 'Travel Time Buffer (in minutes) (Beta)' field is highlighted with a red box and contains the value '5'.

## SEE ALSO:

[Salesforce Help: Set Up Routing for Travel Time Calculations \(can be outdated or unavailable during release preview\)](#)

## Get More Accurate Scheduling Recommendations with Appointment Insights (Beta)

Appointment Insights now supports more work rules, such as the Working Territories and the Extended Match rules, to help you improve the scheduling of service appointments. This additional support provides more accurate information about why appointments can't be scheduled and what changes you can make to qualify more time slots and candidates for scheduling.

**Where:** This change applies to Lightning Experience 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. From the object management settings for service appointments, use Lightning App Builder to add the Appointment Insights Lightning web component to the service appointment record page.

## SEE ALSO:

[Salesforce Help: Get Recommendations with Field Service Appointment Insights \(Beta\) \(can be outdated or unavailable during release preview\)](#)

## Work Capacity

Reserve workforce availability based on dynamic business priorities using Work Capacity.

## IN THIS SECTION:

### [Reserve Workforce Capacity in a Service Territory](#)

Define work capacity limits that restrict schedulable hours in a specific service territory according to your business priorities. You can limit the daily work hours or the percentage of the workforce availability. For example, restrict the daily schedulable hours to 95% of the resources' work hours in Chicago in January, reserving 5% for unexpected work due to snowstorms.

### [Work Capacity Limit Relaxation Renamed for Better Clarity to Limit Override](#)

The feature enabling schedule changes close to or on the day of service by allowing work to be scheduled, even if it exceeds the daily limit, has been renamed Limit Override. Previously, it was referred to as Work Capacity Limit Relaxation.

### [Share Work Capacity Data and Information with Partner Community Dispatchers via Experience Cloud](#)

Field Service Work Capacity objects and the Work Capacity tab are now supported in Experience Cloud sites. The Experience Cloud site enables your partner community dispatchers to see consumption relative to the defined limit in service territories to which they have access permissions. Based on their permissions, users can also create and edit work capacity limits for those service territories.

## Reserve Workforce Capacity in a Service Territory

Define work capacity limits that restrict schedulable hours in a specific service territory according to your business priorities. You can limit the daily work hours or the percentage of the workforce availability. For example, restrict the daily schedulable hours to 95% of the resources' work hours in Chicago in January, reserving 5% for unexpected work due to snowstorms.

**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 and **Allow defining work capacity limits** is selected.

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

[Salesforce Help: Monitor Workstream Usage in Summary View \(can be outdated or unavailable during release preview\)](#)

## Work Capacity Limit Relaxation Renamed for Better Clarity to Limit Override

The feature enabling schedule changes close to or on the day of service by allowing work to be scheduled, even if it exceeds the daily limit, has been renamed Limit Override. Previously, it was referred to as Work Capacity Limit Relaxation.

**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 and **Allow defining work capacity limits** is selected.

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

[Salesforce Help: Monitor Workstream Usage in Summary View \(can be outdated or unavailable during release preview\)](#)

## Share Work Capacity Data and Information with Partner Community Dispatchers via Experience Cloud

Field Service Work Capacity objects and the Work Capacity tab are now supported in Experience Cloud sites. The Experience Cloud site enables your partner community dispatchers to see consumption relative to the defined limit in service territories to which they have access permissions. Based on their permissions, users can also create and edit work capacity limits for those service territories.

**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 and **Allow defining work capacity limits** is selected.

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

[Salesforce Help: Monitor Workstream Usage in Summary View \(can be outdated or unavailable during release preview\)](#)

## Field Service Operations

Streamline, extend, and customize your Field Service operations with these new additions.

IN THIS SECTION:

[Service Documents](#)

Discover what's new for service documents.

[Asset Management](#)

Discover what's new to take asset management to the next level.

[Field Service Intelligence](#)

Boost operations with Field Service Intelligence data-driven solutions.

## Service Documents

Discover what's new for service documents.

IN THIS SECTION:

[Personalize Service Documents with Embedded Expressions](#)

Integrate field values into rich text components to incorporate your company's voice and style throughout your service documents.

With embedded expressions, you can merge field values in rich text components to style the text, reference field values without field names, and improve the flow of your document.

## Personalize Service Documents with Embedded Expressions

Integrate field values into rich text components to incorporate your company's voice and style throughout your service documents. With embedded expressions, you can merge field values in rich text components to style the text, reference field values without field names, and improve the flow of your document.

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

**How:** In Document Builder, drag a rich text component onto the canvas. Optionally, add static text to give context for the embedded field. To embed the field into the rich text component use the following syntax: `{ !Record.fieldname }` or `{ !Record.Objectname.fieldname }`. For example, to embed a phone number for an account, the syntax is `{ !Record.Account.phone }`. Save the template, and then test it on the document preview.

SEE ALSO:

[Salesforce Help: Document Builder Standard Components \(can be outdated or unavailable during release preview\)](#)

## Asset Management

Discover what's new to take asset management to the next level.

### IN THIS SECTION:

#### [Minimize Downtime with Asset Health Score](#)

Combine the capabilities of Data Cloud and CRM Analytics to gain data-driven insights and proactive service recommendations. The Proactive Asset Service monitors asset age, usage, and maintenance history, and then updates the Asset Health Score dashboard to indicate whether an asset is in good, fair, or critical condition. Receive a notification when an asset needs attention. Notifications let you easily identify asset performance and proactively address upcoming issues, ensuring uninterrupted operations and optimized performance.

#### [Provision Entitlements with Precision](#)

Eliminate discrepancies and minimize costly errors when managing entitlements for contracts, warranties, and maintenance plans. The Entitlements view provides agents with an overview of a customer's entitled services, making it easier to identify what was consumed versus what was promised. Previously, entitlement information was available only in related lists, which made it difficult to discern what was available to the customer.

#### [Link Assets to Multiple Accounts and Contacts](#)

Associate multiple service contracts from different accounts to the same asset to make it easier to track the history of work performed for the asset. For example, associate a leased vehicle to the lessee and leaser accounts to manage a separate service contract for each. Previously, you could only connect an asset to a single account and contact.

#### [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.

### Minimize Downtime with Asset Health Score

Combine the capabilities of Data Cloud and CRM Analytics to gain data-driven insights and proactive service recommendations. The Proactive Asset Service monitors asset age, usage, and maintenance history, and then updates the Asset Health Score dashboard to indicate whether an asset is in good, fair, or critical condition. Receive a notification when an asset needs attention. Notifications let you easily identify asset performance and proactively address upcoming issues, ensuring uninterrupted operations and optimized performance.

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

**How:** To enable Proactive Asset Service, in Setup, go to Proactive Asset Service Setup and complete the required setup steps. Enable CRM Analytics, and turn on Proactive Asset Service.

### SEE ALSO:

[Salesforce Help: Proactive Asset Service \(can be outdated or unavailable during release preview\)](#)

### Provision Entitlements with Precision

Eliminate discrepancies and minimize costly errors when managing entitlements for contracts, warranties, and maintenance plans. The Entitlements view provides agents with an overview of a customer's entitled services, making it easier to identify what was consumed versus what was promised. Previously, entitlement information was available only in related lists, which made it difficult to discern what was available to the customer.

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

**How:** From the Lightning App Builder, drag the Warranties View and Contracts View components to the asset record page, and activate the changes. Next, in Object Manager, drag the Show Coverage (desktop) and Select Coverage (mobile) to the Work Order page layout, and repeat for the Case page layout. Agents and technicians can choose the appropriate coverage on desktop and mobile.

SEE ALSO:

[Salesforce Help: Manage Entitlements in Field Service \(can be outdated or unavailable during release preview\)](#)

## Link Assets to Multiple Accounts and Contacts

Associate multiple service contracts from different accounts to the same asset to make it easier to track the history of work performed for the asset. For example, associate a leased vehicle to the leasee and leaser accounts to manage a separate service contract for each. Previously, you could only connect an asset to a single account and contact.

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

SEE ALSO:

[Salesforce Help: Associate an Asset with Its Related Contacts \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Associate an Asset with Its Related Accounts \(can be outdated or unavailable during release preview\)](#)

## 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 change 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 Intelligence

Boost operations with Field Service Intelligence data-driven solutions.

**IN THIS SECTION:**[Unlock Insights and Dashboards with Field Service Intelligence](#)

The Field Service Intelligence app provides insights from Data Cloud with CRM Analytics to identify trends across your work orders, service appointments, assets, and service resources. Access dashboards that centralize your field service data to make informed operational decisions.

## Unlock Insights and Dashboards with Field Service Intelligence

The Field Service Intelligence app provides insights from Data Cloud with CRM Analytics to identify trends across your work orders, service appointments, assets, and service resources. Access dashboards that centralize your field service data to make informed operational decisions.

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

**Who:** To use the Field Service Intelligence dashboards, you need the Field Service Intelligence User permission set. To manage the Field Service Intelligence dashboards, you need the Field Service Intelligence Admin permission set.

**How:** To enable Field Service Intelligence, in Setup, go to Field Service Intelligence Setup and complete the required setup steps. Enable CRM Analytics, and turn on Field Service Intelligence. Assign the Field Service Intelligence permission sets to the appropriate users.

**SEE ALSO:**

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

## Field Service Customer Engagement

Enhance and elevate your customer interactions with these new features.

**IN THIS SECTION:**[Improve Your Data Security with Automated Deletion of Visual Remote Assistant Video Recordings](#)

Use automation to retain only the data that you need by efficiently deleting unnecessary Visual Remote Assistant video session recordings. Trigger an automated deletion process by creating custom criteria with a flow. Previously, you manually created a list of videos and contacted Salesforce Customer Support.

## Improve Your Data Security with Automated Deletion of Visual Remote Assistant Video Recordings

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**Where:** This feature is available in Lightning Experience in Enterprise, Unlimited, and Developer editions with the Field Service managed package installed.

**How:** Add a prebuilt Apex action to your flow. For example, create criteria to find specific Visual Remote Assistant videos and delete them.

**SEE ALSO:**

[Salesforce Help: Set Up Visual Remote Assistant for 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.

## IN THIS SECTION:

### [Lightning Web Components](#)

Customize your Field Service mobile experience with powerful, tailored components.

### [Give Workers Access to Files with Content Libraries](#)

Create custom libraries to provide mobile workers quick, easy access to files they need to complete the job. From the Field Service Mobile App Builder, create a custom tab for the bottom navigation bar, so mobile workers can view files in organized folders. Previously, files weren't organized and mobile workers had to scroll to find relevant files.

### [Track Hours Offline With Time Sheets Priming](#)

With time sheets priming, you can prime up to three time sheet list views that mobile workers can access and edit offline to avoid down time and complete jobs faster.

### [Stay on Track with the Field Service Widget \(Generally Available\)](#)

This feature, which is now generally available, gives mobile workers quick access to their next appointment in a widget on their home screen. Workers can see the appointment details and check when they must head out to the appointment to make sure that they're on time. And, workers can update the appointment status and navigate to the location. The widget is available out-of-the-box.

### [Get Accurate Site Check-Ins and Check-Outs \(Generally Available\)](#)

This feature, which is now generally available, keeps track of the actual times that mobile workers arrived and left job sites. With automated timestamps for geolocation-based actions, you can then create reports that give insights on the time that mobile workers spend at each location. Timestamps are captured even when the mobile app is offline and are more reliable than the manual input given by mobile workers.

### [Choose How Mobile Workers Navigate to Destinations](#)

Let mobile workers navigate to destinations based on an address (default) or based on latitude and longitude coordinates. Select the preferred option for your users in the Destination Type field in Field Service Mobile Settings. Previously, you could navigate only based on address.

### [Measure an Object with Augmented Reality](#)

Mobile workers can use augmented reality to measure between two or more points directly from the Field Service mobile app.

### [Create Leads and Opportunities from the Field](#)

Use a flow template that lets your mobile workers create leads and opportunities for potential customers directly from the app without contacting customer services. For example, if a customer mentions that their neighbor is interested in their services, the mobile worker can create an opportunity. Customer services then sees the opportunity and follows up accordingly.

### [Upsell Your Business from the Field \(Beta\)](#)

Let your mobile workers create quotes for customers directly from the Field Service mobile app without contacting customer services. For example, if a mobile worker is repairing a customer's oven and notices that some of the parts need replacement, the worker can create a quote and provide a price estimate on-site.

### [Optimize Data Retrieval with Cache-First \(Beta\)](#)

Enhance your data retrieval speed and app performance by opting into the cache-first policy for the Field Service mobile app. Cache-first improves functionality in areas with fluctuating connectivity by loading data from the cache first while simultaneously fetching the latest data from the network. Load data faster with minimal delays compared to the previous online preferred policy. The Field Service mobile app also refreshes the display with updated data immediately after network calls are completed, ensuring access to the most current information.

## Lightning Web Components

Customize your Field Service mobile experience with powerful, tailored components.

### IN THIS SECTION:

#### [Simplify Interactions with Data with Near Field Communication on iOS](#)

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. Previously, the plug-in was available only for Android devices.

#### [Capture the Layout of a Space with Augmented Reality](#)

Create a Lightning web component (LWC) that uses the Space Capture plug-in to capture an image showing the layout of a space. The LWC uses the device's native Lidar capability to capture 2D and 3D measurements within the Field Service mobile app.

## Simplify Interactions with Data with Near Field Communication on iOS

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. Previously, the plug-in was available only for Android devices.

**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 \(can be outdated or unavailable during release preview\)](#)

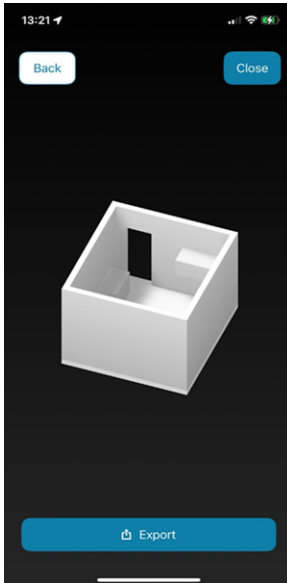
[Field Service Developer Guide: Add Lightning Web Components for Plug-Ins to the Field Service Mobile App \(can be outdated or unavailable during release preview\)](#)

## Capture the Layout of a Space with Augmented Reality

Create a Lightning web component (LWC) that uses the Space Capture plug-in to capture an image showing the layout of a space. The LWC uses the device's native Lidar capability to capture 2D and 3D measurements within the Field Service mobile app.

**Where:** This feature is available in the Field Service mobile app for iOS.

**How:** Here's how a captured space looks.

**SEE ALSO:**

[Salesforce Help: Customize and Extend the Field Service Mobile App with Lightning Web Components \(can be outdated or unavailable during release preview\)](#)

[Field Service Developer Guide: Capture a Space on a Mobile Device \(can be outdated or unavailable during release preview\)](#)

## Give Workers Access to Files with Content Libraries

Create custom libraries to provide mobile workers quick, easy access to files they need to complete the job. From the Field Service Mobile App Builder, create a custom tab for the bottom navigation bar, so mobile workers can view files in organized folders. Previously, files weren't organized and mobile workers had to scroll to find relevant files.

**Where:** This feature is available in the Field Service mobile app for Android and iOS.

**SEE ALSO:**

[Salesforce Help: Customize Tabs with the Field Service Mobile App Builder \(can be outdated or unavailable during release preview\)](#)

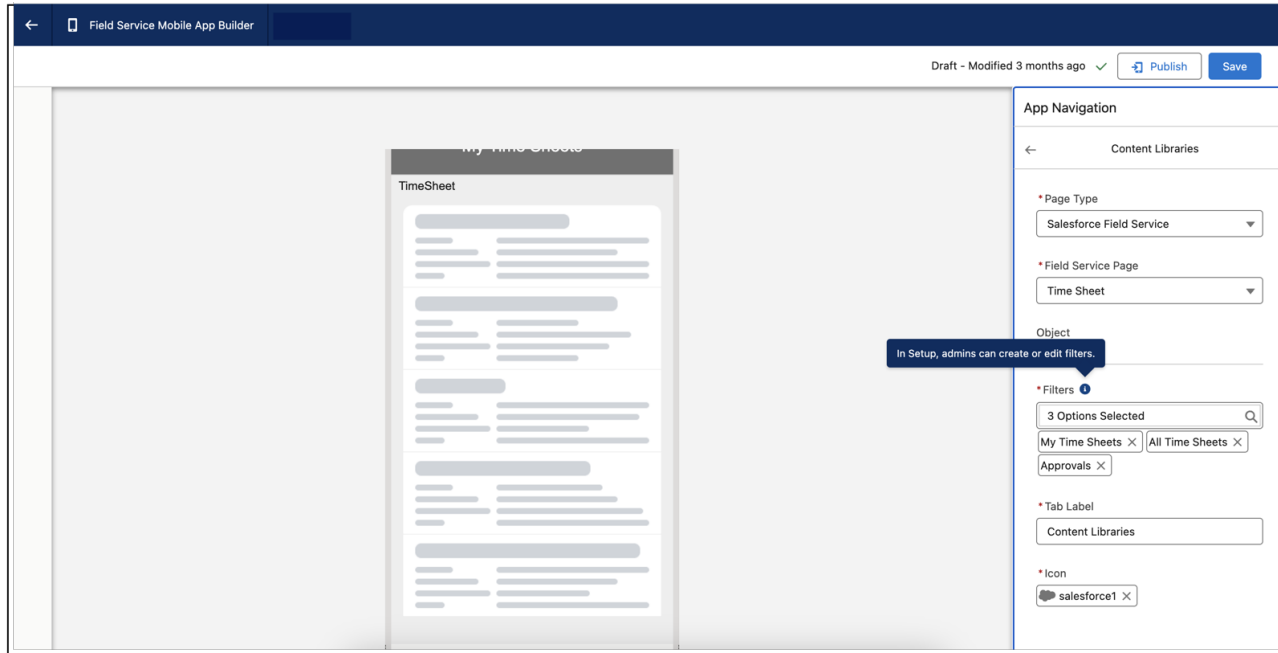
[Salesforce Help: Work with Tabs \(can be outdated or unavailable during release preview\)](#)

## Track Hours Offline With Time Sheets Priming

With time sheets priming, you can prime up to three time sheet list views that mobile workers can access and edit offline to avoid down time and complete jobs faster.

**Where:** This feature is available in the Field Service mobile app for Android and iOS.

**How:** From Setup, in the Quick Find box, enter and select **Field Service Mobile App Builder**. Under App Navigation, select up to three filters for the Time Sheets tab to ensure the time sheets in those list views are primed for offline use.



## SEE ALSO:

[Salesforce Help: Customize Tabs with the Field Service Mobile App Builder \(can be outdated or unavailable during release preview\)](#)

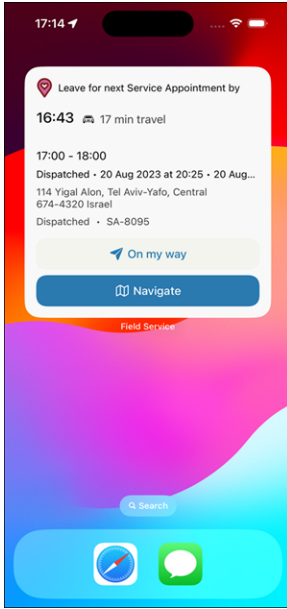
[Salesforce Help: Offline Priming in the Field Service Mobile App \(can be outdated or unavailable during release preview\)](#)

## Stay on Track with the Field Service Widget (Generally Available)

This feature, which is now generally available, gives mobile workers quick access to their next appointment in a widget on their home screen. Workers can see the appointment details and check when they must head out to the appointment to make sure that they're on time. And, workers can update the appointment status and navigate to the location. The widget is available out-of-the-box.

**Where:** This feature is available in the Field Service mobile app for iOS.

**How:** Tell your mobile workers to add the Field Service widget to their iPhone's home screen.



SEE ALSO:

[Salesforce Help: Add the Field Service Mobile Widget \(can be outdated or unavailable during release preview\)](#)

## Get Accurate Site Check-Ins and Check-Outs (Generally Available)

This feature, which is now generally available, keeps track of the actual times that mobile workers arrived and left job sites. With automated timestamps for geolocation-based actions, you can then create reports that give insights on the time that mobile workers spend at each location. Timestamps are captured even when the mobile app is offline and are more reliable than the manual input given by mobile workers.

**Where:** This feature is available in the Field Service mobile app for Android and iOS.

**How:** Create a flow that connects geolocation-based actions to service appointments. Previously, you created the actions using the custom attributes. Create an action that's triggered when the mobile worker arrives at a location and another one for when they leave the location. Then, create a report that shows the timestamps.

| Joined Report<br>Geolocation-Based Actions Report |                        |                      |                |                     |                     |
|---------------------------------------------------|------------------------|----------------------|----------------|---------------------|---------------------|
| Appointment Number ↑                              | Service Resource: Name | Assigned Resource ID | Action Name    | First Time Invoked  | Last Time Invoked   |
| SA-0001                                           | Doron                  | 03rSB0000000A4D      | Site Check-in  | 8/27/2023, 1:02 PM  | 8/28/2023, 10:48 AM |
|                                                   |                        |                      | Site Check-Out | 8/28/2023, 10:00 AM | 8/28/2023, 12:00 PM |
| SA-0002                                           | Jenny                  | 03rSB0000000ANZ      | Site Check-in  | 8/28/2023, 12:30 PM | 8/28/2023, 12:30 PM |
|                                                   |                        |                      | Site Check-Out | 8/28/2023, 2:30 PM  | 8/28/2023, 2:30 PM  |
| SA-0004                                           | Doron                  | 03rSB00000006S1      | Site Check-in  | 8/27/2023, 12:00 PM | 8/27/2023, 12:00 PM |
|                                                   |                        |                      | Site Check-Out | 8/29/2023, 12:00 PM | 8/29/2023, 12:00 PM |
| SA-0005                                           | Jenny                  | 03rSB000000080n      | Site Check-in  | 8/28/2023, 12:00 PM | 8/28/2023, 12:00 PM |
|                                                   |                        |                      | Site Check-Out | 8/28/2023, 2:00 PM  | 8/28/2023, 2:00 PM  |

SEE ALSO:

[Salesforce Help: Set Up Geolocation-Based Actions for the Field Service Mobile App \(can be outdated or unavailable during release preview\)](#)

## Choose How Mobile Workers Navigate to Destinations

Let mobile workers navigate to destinations based on an address (default) or based on latitude and longitude coordinates. Select the preferred option for your users in the Destination Type field in Field Service Mobile Settings. Previously, you could navigate only based on address.

**Where:** This change applies to the Field Service mobile app for Android and iOS.

SEE ALSO:

[Salesforce Help: Learn More About Field Service Mobile Settings \(can be outdated or unavailable during release preview\)](#)

## Measure an Object with Augmented Reality

Mobile workers can use augmented reality to measure between two or more points directly from the Field Service mobile app.

**Where:** This feature is available in the Field Service mobile app for iPhone 11 and above.

**How:** Instruct your mobile workers to tap the Measure global action and point their camera at the required object. They can then copy the measurement to their clipboard and paste it into the required field.



SEE ALSO:

[Salesforce Help: Measuring Lengths with Augmented Reality \(can be outdated or unavailable during release preview\)](#)

## Create Leads and Opportunities from the Field

Use a flow template that lets your mobile workers create leads and opportunities for potential customers directly from the app without contacting customer services. For example, if a customer mentions that their neighbor is interested in their services, the mobile worker can create an opportunity. Customer services then sees the opportunity and follows up accordingly.

**Where:** This feature is available in the Field Service mobile app for Android and iOS.

**How:** Add an action to the mobile workers' layout that launches the Field Service Mobile: Create Leads and Opportunities flow.


SEE ALSO:

[Salesforce Help: Set Up Lead and Opportunity Creation for Field Service Mobile Workers \(can be outdated or unavailable during release preview\)](#)

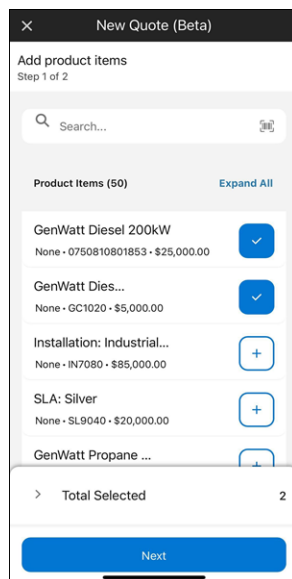
## Upsell Your Business from the Field (Beta)

Let your mobile workers create quotes for customers directly from the Field Service mobile app without contacting customer services. For example, if a mobile worker is repairing a customer's oven and notices that some of the parts need replacement, the worker can create a quote and provide a price estimate on-site.

**Where:** This feature is available in the Field Service mobile app for Android and iOS.

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

**How:** Add the New Quote (Beta) quick action to the mobile workers' layout for work orders.



SEE ALSO:

[Salesforce Help: Set Up Mobile Quoting for Field Service Mobile Workers \(Beta\) \(can be outdated or unavailable during release preview\)](#)

## Optimize Data Retrieval with Cache-First (Beta)

Enhance your data retrieval speed and app performance by opting into the cache-first policy for the Field Service mobile app. Cache-first improves functionality in areas with fluctuating connectivity by loading data from the cache first while simultaneously fetching the latest data from the network. Load data faster with minimal delays compared to the previous online preferred policy. The Field Service mobile app also refreshes the display with updated data immediately after network calls are completed, ensuring access to the most current information.

**Where:** This feature is available in the Field Service mobile app for Android and iOS.

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

**When:** The beta version of the cache-first policy became available for the Field Service mobile app starting June 5, 2024.

SEE ALSO:

[Field Service Mobile Beta and Early Adopters Program](#)

[Offline Priming in the Field Service Mobile App](#)

## Industries

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Industries solutions shape Salesforce to the needs of your business, reducing the need for you to customize things yourself. Consumer Goods Cloud streamlines delivery and distribution processes with Direct Store Delivery and Van Sales. Optimize service operations in the field with Field Service for Industries. Health Cloud integrates with Milliman Care Guidelines (MCG) to bring industry-standard assessments to Integrated Care Management. Loyalty Management gives marketing managers greater flexibility with Global Promotions Management. Manufacturing Cloud helps manufacturers streamline the process of recovering costs on defective parts from suppliers with Warranty Supplier Recovery. Salesforce for Education helps students plan their degrees better with Intelligent Degree Planning. We also have plenty of changes for Automotive Cloud, Salesforce for Nonprofits, Public Sector Solutions, Industries common features, and much more.

IN THIS SECTION:

### [Automotive Cloud](#)

Transform automotive experiences with connected vehicles and gain invaluable insights into performance metrics, maintenance needs, and customer preferences. Trigger orchestrations in real time that allows for predictive maintenance. Assist your drivers in times of emergency and otherwise with remote actions and timely notifications. Diagnose issues, driver safety, and vehicle performance using the power of Data Cloud. Seamlessly visualize metrics and insights from Data Cloud right in your Automotive app. Get reimbursed by your suppliers for faulty parts covered under warranty and recover your costs with supplier recovery claims. Create effective product service campaigns and curate outreach lists for asset recalls.

### [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 and increase operational efficiencies. Explore industry-specific apps including Enterprise Sales Management, Communications Cloud Agent Console, and Multiplay Subscription Management, and business solutions including Field Service for Industries, Configure, Price, Quote (Industries CPQ), and Enterprise Product Catalog (EPC).

### [Connected Assets](#)

Modernize your asset management operations, optimize asset performance, and proactively maintain your assets by using Connected Assets. Visualize an asset's health and performance metrics and trigger workflows for asset faults and events. Act on telematics data such as sensor calibration issues or battery issues in real time by using Actionable Event Orchestration. Track usage-based entitlements for connected assets.

### [Consumer Goods Cloud](#)

Transfer data from Consumer Goods Cloud to Data Cloud by using data streams. Leverage the integrated data to segment retail customers and strategize planning activities. Use the Direct Store Delivery and Van Sales features to streamline your delivery and distribution processes. Conveniently administer sync features from a central location and improve traceability of sync records by using sync ID. Use the Modeler CLI command to quickly add a validation method and use the dynamically proposed XML attributes to accurately customize contracts. You can now do better precision rounding for KPIs with the Rounding within Period rounding type, and run the Push Promotion process faster.



### [Energy and Utilities Cloud](#)

Energy & Utilities (E&U) cloud combines and extends the full power of Salesforce Sales and Service clouds and the Salesforce Platform into an industry-specific solution for utilities, retail energy, and modern energy services companies.

### [Asset Service Lifecycle Management](#)

Asset Service Lifecycle Management empowers businesses to build customer-centric field service operations, maximize asset lifetime value, and elevate the experience of service teams. Use Asset Service Lifecycle Management to accelerate service delivery, proactively manage assets, and simplify the work order management process. Manage the repair, recall, and upgrade of assets at scale by using Product Service Campaign. Estimate field service work before you create work orders by using Work Order Estimation.

### [Financial Services Cloud](#)

Learn about the new features and enhancements in Financial Services Cloud that strengthen client management, automate tasks, provide deeper customer insights, and simplify data organization.

### [Health Cloud](#)

Einstein Generative AI automates assessment generation. Home Health optimizes visit scheduling and has a new component for Experience Cloud users. Integrated Care Management integrates with Milliman Care Guidelines (MCG) to bring industry-standard care guidelines and assessments to Health Cloud. The Group Benefits app helps insurance sales agents track leads and enroll members better to boost sales performance. Intelligent Appointment Management now supports multi-step scheduling. Provider Network Management gets a new app.

### [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 Summer '24.

### [Life Sciences Cloud \(Generally Available\)](#)

Life Sciences Cloud is a new end-to-end product built on the Salesforce platform for organizations engaged in the Life Sciences industry. Inheriting a robust pool of features from other Salesforce Industries products, like Health Cloud, and adding its own brand-new set of features, Life Sciences Cloud helps organizations optimize their operations in the clinical, medical, and commercial domains. Life Sciences Cloud is available, starting June 2024.

### [Loyalty Management](#)

Marketing managers can create flexible promotions rules with the Build Your Own Promotion template in Global Promotions Management. Companies can now decide whether they want their members to hold a negative point balance. Easily clone and launch your repeatable and most successful promotions. Add up to 50,000 partners to your loyalty program. Streamline marketing manager and loyalty program manager onboarding with new permission sets.

### [Manufacturing Cloud](#)

Harmonize, transform, and unlock insights at scale from asset, customer, sales, and service data by using Data Cloud features. Easily manage your supplier recovery processes to recover the expenses for repairing defective parts procured from suppliers. Orchestrate effective product service campaigns to segment faulty assets, perform product recalls, and manage customer outreach. Generate estimates on field service work before you create work orders.

### [Media Cloud](#)

With the Media Cloud business applications you can attract, engage, and support customers from anywhere, maximize lifetime value, and improve operational efficiency across the media value chain.

### Net Zero Cloud

Address compliance reporting with new features and enhancements to Net Zero Cloud and Disclosure and Compliance Hub. Design and maintain disclosure document templates directly in Microsoft 365 Word. After you upload your disclosure reports from previous years, Einstein generative AI helps you quickly create responses by searching for existing answers in your documents. Einstein can also provide detailed explanations for each response, and help you confirm accuracy. View and export the greenhouse gas emissions calculations. Enable field history tracking for seamless tracking of value changes in Net Zero Cloud objects. Make primary data acquisition easier and more straightforward through a new simplified data collection. Streamline your workflows by giving users full access to data entry and calculations.

### Public Sector Solutions

Make it easy for constituents to file and track claims for social insurance benefits. Find and address circumstances that prevent constituents from getting the care or services that they need. Coordinate with service providers to manage referrals and efficiently deliver services to constituents. Easily capture interaction notes with a single unified component. Help constituents recertify for benefits to renew or revise their benefit eligibility. Collaborate with partner organizations and funders to share performance indicators and outcome results.

### Referral Marketing

Marketing managers can now design referral promotions as per the marketing or industry requirements. Reusable promotion templates enable marketing managers to decide at which stages advocates and their friends are rewarded and to customize promotion stage names. Using the refreshed referral promotion guided flow, marketing managers can select the promotion's reward and then decide the content of the promotion emails. Get the referral promotion emails ready for launch without spending much time editing the emails. Run referral promotions for your company's loyalty program. Easily track the advocate count of referral promotions.

### Salesforce Contracts

Salesforce Contracts 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 robust contract lifecycle management is crucial to the overall health of 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

Provide an intuitive, guided degree planning experience for your students by using Intelligent Degree Planning. Enable students to view the details of learning courses and programs, and track their progress by using new Lightning web components. Optimize the matching of mentors and mentees by using a new guided flow and comparison layout. Simplify the appointment experience with automatic resource assignments, and QR codes for onsite check-ins. Create assessments easily with intelligent suggestions from Einstein. Migrate from Admissions Connect, Student Success Hub, and Education Data Architecture to the integrated version of Education Cloud. Leverage Common App first-year data in Education Cloud.

### Salesforce for Nonprofits

Salesforce for Nonprofits includes platform solutions and managed packages for nonprofits. Nonprofit Cloud, built on the Salesforce platform, makes it easier to monitor fundraising efforts by using source codes, generate donor acknowledgments, manage program participation, and create cohorts of program participants.

### 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 products in Industries share features. In this release we've enhanced some of the features that help you provide excellent customer service, made updates that save you time in Business Rules Engine, extended functionality in Data Processing Engine, and much more.

## Automotive Cloud

Transform automotive experiences with connected vehicles and gain invaluable insights into performance metrics, maintenance needs, and customer preferences. Trigger orchestrations in real time that allows for predictive maintenance. Assist your drivers in times of emergency and otherwise with remote actions and timely notifications. Diagnose issues, driver safety, and vehicle performance using the power of Data Cloud. Seamlessly visualize metrics and insights from Data Cloud right in your Automotive app. Get reimbursed by your suppliers for faulty parts covered under warranty and recover your costs with supplier recovery claims. Create effective product service campaigns and curate outreach lists for asset recalls.

### IN THIS SECTION:

#### [Connected Services for Vehicles](#)

Usher in the future of mobility with connected services for vehicles. Visualize a vehicle's health and performance metrics, power real-time remote actions, and trigger workflows for vehicle faults and failures. Get the status of a vehicle in real time so that you can monitor key performance metrics, such as odometer reading, fuel status, and engine condition. Get prebuilt service processes for common remote actions, such as locking and unlocking vehicle doors or sending alerts to the driver. Use the actionable event orchestration framework to act on telematics data such as transmission failures or engine overheating issues in real-time. Track usage-based yearly entitlements for connected vehicles.

#### [Data Cloud for Automotive Experiences](#)

Unify your customer and vehicle data in Data Cloud, and connect data between external telematics systems and Automotive Cloud. Use the telematics data model objects to ingest real-time vehicle data into Data Cloud. Then harmonize the data to build segments, create calculated insights, and analyze key metrics. Use the Automotive data kit to access predefined calculated insights and data streams that help you drive personalized experiences and monitor customer and vehicle performance. You can also add the predefined flexcards to a Vehicle or an Account record page so that sales and service teams can visualize data stored in Data Cloud objects and calculated insights.

#### [Supplier Recovery Claims](#)

Streamline the process of raising supplier recovery claims for parts covered by contract terms with suppliers. Whenever quality issues arise in parts supplied by a partner, promptly initiate supplier recovery claims to recoup incurred costs. As a manufacturer, you can enhance the supplier recovery rate and substantially reduce warranty costs. You can now create a supplier recovery claim from an existing partner warranty claim. Suppliers can efficiently adjudicate these claims via the Experience Cloud site. The Claims Detail context definition has been updated to improve efficiency.

#### [Product Service Campaigns for Vehicle and Parts Recalls](#)

Organize product service campaigns to service faulty products, recall defective assets, and manage outreach campaigns at scale. Service managers can create and manage effective campaigns, nurture customer trust, and ensure customer safety. They can effortlessly segment and curate lists of impacted vehicle parts. Service agents can use these lists to engage with customers and track services to be performed on assets.

#### [Automotive Foundational Enhancements](#)

Make the most of the additional enhancements in Automotive Cloud. Action Launcher is now available in Experience Cloud, new fields are added to Vehicle and Asset, and users can create quote actions for assets.

## New and Enhanced Common Features for Industries

Automotive Cloud includes some features that are available across clouds and products in Industries. Use these features to extend and customize Automotive Cloud based on your business needs.

- [Action Launcher](#)

Contact center agents (CCAs) can quickly resolve customer requests by launching Aura components. CCAs can now search for actions based on semantic search or the meaning of search keywords. Out-of-the-Box Deployment is renamed as Standard Deployment. Use the new and updated objects to provide CCAs with recommended actions and Aura components through Action Launcher.

- [Business Rules Engine](#)

Incorporate new logic into expression set versions efficiently by changing subexpressions in fewer clicks. Map a subexpression's variables to the local resources of the expression set that the subexpression is used in. Easily deactivate or modify the decision tables that are referenced in expression set versions. Use medium-scale decision tables to process a large volume of rows. Save time and effort by using ready-to-use templates to create decision tables. Enhance the decision-making capability of your decision tables by using the Does Not Match and Contains operators.

- [Context Service](#)

Use context definitions as a source for mapping data. Map the nodes and attributes of a context definition to the objects in another context definition. Conveniently generate and edit input mapping for all nodes and attributes of a definition, reducing manual selection of each node. Support different mapping types with mapping intent operations.

- [Criteria-Based Search and Filter](#)

Enhance the search experience for customers and business partners by adding Criteria-Based Search and Filter to your Experience Cloud sites. Help users visualize data by showing resources from search results in an interactive map. Make search results displayed as cards easier to manage by providing sorting options. Share data from search results by using the prebuilt Copy Records and Create Report actions for Criteria-Based Search and Filter.

- [Data Processing Engine](#)

Upload large amounts of data into your definition with CSV files. Use the Data Cloud runtime with extended functionality for join, filter, formula, and writeback nodes.

- [List Builder for Data Cloud Segment](#)

The records removed from a Data Cloud segment get suppressed in the associated actionable list.

- [Timeline](#)

Configure a data graph in Timeline to show engagement events from data model objects (DMOs), including the Unified Individual DMO. Include event summaries on Timeline.

## Connected Services for Vehicles

Usher in the future of mobility with connected services for vehicles. Visualize a vehicle's health and performance metrics, power real-time remote actions, and trigger workflows for vehicle faults and failures. Get the status of a vehicle in real time so that you can monitor key performance metrics, such as odometer reading, fuel status, and engine condition. Get prebuilt service processes for common remote actions, such as locking and unlocking vehicle doors or sending alerts to the driver. Use the actionable event orchestration framework to act on telematics data such as transmission failures or engine overheating issues in real-time. Track usage-based yearly entitlements for connected vehicles.

### IN THIS SECTION:

- [Usage-Based Licensing for Connected Vehicle Services](#)

Select vehicles in your org that you want to enable for connected services. Only vehicles with active connected services are eligible for monthly entitlements related to actionable event orchestrations and remote actions. Each Vehicle Connected Services Monthly Per Unit Entitlement add-on license allows you to activate connected services for one vehicle in your org. You can purchase additional units of the add-on license to increase the number of connected vehicles in the org.

### Remote Vehicle Actions

Service and sales teams can now take real-time actions and monitor the health and performance metrics for each connected vehicle in your org. Users can easily visualize vehicle data in real time and refresh the metrics on demand so that they can proactively engage with drivers on potential safety issues. Service agents can launch a remote action to lock or unlock the doors of a car and provide emergency assistance to the driver in real time. They can also send remote notifications to drivers to inform them about upcoming appointments, software updates, or critical milestones.

### Actionable Telematics Event Management

Connect events with conditions and actions, and drive declarative orchestrations for each event. Create qualification and evaluation rules for different event types originating in a vehicle or other external systems. Design an orchestration process that detects vehicle diagnostic codes sent by a telematics system, and performs actions based on preset conditions. You can create or update record alerts, cases, milestones, and appointments for events that vehicle telematics providers send to Automotive Cloud.

## Usage-Based Licensing for Connected Vehicle Services

Select vehicles in your org that you want to enable for connected services. Only vehicles with active connected services are eligible for monthly entitlements related to actionable event orchestrations and remote actions. Each Vehicle Connected Services Monthly Per Unit Entitlement add-on license allows you to activate connected services for one vehicle in your org. You can purchase additional units of the add-on license to increase the number of connected vehicles in the org.

### IN THIS SECTION:

#### [Easily Select Which Vehicles Are Used for Connected Services](#)

Control the number of vehicles in your org for which connected services are enabled. To mark a vehicle eligible for connected services, use the new Connected Service Active checkbox on a Vehicle record page. If connected services are active for a vehicle, users can trigger a fixed number of actionable event orchestrations and remote actions based on yearly entitlements provisioned for your org.

#### [Control Event Orchestrations for Vehicles Based on Usage](#)

Get a monthly entitlement of 150 actionable event orchestrations with the Vehicle Connected Services Monthly Per Unit Entitlement add-on license. Users can execute up to 150 orchestrations of usage type Automotive to process inbound events for connected vehicles. You can keep an eye on the amount used and the allowance limit for the Actionable Vehicle Event Orchestration Limit usage-based entitlement on the Company Information page in Setup.

#### [Control Remote Actions for Vehicles Based on Usage](#)

Get yearly entitlements of remote actions per connected vehicle with the Vehicle Connected Services Monthly Per Unit Entitlement add-on license. Users can send up to 150 remote notifications, execute 150 remote operations for locking and unlocking doors, and trigger 300 Get Status API calls monthly for connected vehicles. You can keep an eye on the amount used and the allowance limit for the resources on the Company Information page in Setup.

## Easily Select Which Vehicles Are Used for Connected Services

Control the number of vehicles in your org for which connected services are enabled. To mark a vehicle eligible for connected services, use the new Connected Service Active checkbox on a Vehicle record page. If connected services are active for a vehicle, users can trigger a fixed number of actionable event orchestrations and remote actions based on yearly entitlements provisioned for your org.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Connected Vehicle Services is enabled. The org must also have the Vehicle Connected Services Yearly Per Unit Entitlement add-on license provisioned. The add-on license gives access to one unit of connected vehicle. To get more vehicles activated for connected services, you must purchase additional add-on licenses.

**Who:** Users must have the Vehicle Connected Services permission set assigned to them.

**How:** From the App Launcher, find and select **Vehicles**. Select the **Connected Service Active** checkbox.

### Control Event Orchestrations for Vehicles Based on Usage

Get a monthly entitlement of 150 actionable event orchestrations with the Vehicle Connected Services Monthly Per Unit Entitlement add-on license. Users can execute up to 150 orchestrations of usage type Automotive to process inbound events for connected vehicles. You can keep an eye on the amount used and the allowance limit for the Actionable Vehicle Event Orchestration Limit usage-based entitlement on the Company Information page in Setup.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Connected Vehicle Services is enabled. The org must also have the Vehicle Connected Services Monthly Per Unit Entitlement add-on license provisioned.

**Who:** Users must have the Vehicle Connected Services permission set assigned to them.

### Control Remote Actions for Vehicles Based on Usage

Get yearly entitlements of remote actions per connected vehicle with the Vehicle Connected Services Monthly Per Unit Entitlement add-on license. Users can send up to 150 remote notifications, execute 150 remote operations for locking and unlocking doors, and trigger 300 Get Status API calls monthly for connected vehicles. You can keep an eye on the amount used and the allowance limit for the resources on the Company Information page in Setup.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Connected Vehicle Services is enabled. The org must also have the Vehicle Connected Services Monthly Per Unit Entitlement add-on license provisioned.

**Who:** Users must have the Vehicle Connected Services permission set assigned to them.

### Remote Vehicle Actions

Service and sales teams can now take real-time actions and monitor the health and performance metrics for each connected vehicle in your org. Users can easily visualize vehicle data in real time and refresh the metrics on demand so that they can proactively engage with drivers on potential safety issues. Service agents can launch a remote action to lock or unlock the doors of a car and provide emergency assistance to the driver in real time. They can also send remote notifications to drivers to inform them about upcoming appointments, software updates, or critical milestones.

#### IN THIS SECTION:

##### [Visualize A Vehicle's Health and Performance Metrics in Real Time](#)

Display telematics data directly from the vehicle's sensors on flexcards on a Vehicle record page. Help service and sales teams monitor the status of key performance and health metrics such as the fuel or battery consumption, engine revolutions per minute, speed, geolocation, and engine temperature. Agents can refresh the data on demand and alert customers to potential safety issues. For example, if agents see an increase in revolutions per minute (RPMs), or loss of tire pressure, they can send alerts to the driver in their infotainment console.

##### [Lock and Unlock Doors of Vehicles In Real Time](#)

Drivers on the road require emergency assistance when they're locked out of their vehicles or when they're in an accident. Service representatives at your automotive company can now quickly launch a service process from a Vehicle record page that locks and unlocks the doors of the vehicle in real time. When the service representative selects the process from the action launcher, they can view the real-time status of the front doors, rear doors, the trunk, and the hood, and change them as required. A case is automatically created that helps the service representative track the service request for the remote action.

### [Send Alerts to a Driver Right from the Automotive App](#)

Stay connected with your drivers while they are on the go by sharing key notifications and alerts to the car's human machine interface (HMI) display. Service representatives at your automotive company can now quickly launch a service process from a Vehicle record page to send a message to a driver. They can also relate the message to a Salesforce record for additional context, such as a case, a milestone, or a service appointment. For example, the service representative can select a case record for a vehicle's software upgrade and add a message letting the driver know that the upgrade was successfully completed. A case is automatically created that helps the service representative track the service request for the remote notification.

## Visualize A Vehicle's Health and Performance Metrics in Real Time

Display telematics data directly from the vehicle's sensors on flexcards on a Vehicle record page. Help service and sales teams monitor the status of key performance and health metrics such as the fuel or battery consumption, engine revolutions per minute, speed, geolocation, and engine temperature. Agents can refresh the data on demand and alert customers to potential safety issues. For example, if agents see an increase in revolutions per minute (RPMs), or loss of tire pressure, they can send alerts to the driver in their infotainment console.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Connected Vehicle Services is enabled. The org must also have the Vehicle Connected Services Yearly Per Unit Entitlement add-on license, which allows 3000 Get Status API calls yearly for each connected vehicle.

**Who:** Users must have the Vehicle Connected Services permission set assigned to them.

## Lock and Unlock Doors of Vehicles In Real Time

Drivers on the road require emergency assistance when they're locked out of their vehicles or when they're in an accident. Service representatives at your automotive company can now quickly launch a service process from a Vehicle record page that locks and unlocks the doors of the vehicle in real time. When the service representative selects the process from the action launcher, they can view the real-time status of the front doors, rear doors, the trunk, and the hood, and change them as required. A case is automatically created that helps the service representative track the service request for the remote action.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Connected Vehicle Services is enabled. The org must also have the Vehicle Connected Services Yearly Per Unit Entitlement add-on license, which allows 2000 remote actions yearly for each connected vehicle.

**Who:** Users must have the Connected Vehicle Services permission set assigned to them.

**How:** On a Vehicle record page, go to the Connected Services tab. In the Action Launcher, type in the name of the service process created from the Remote Vehicle Door Lock and Unlock template. Select the action and change the status of the doors as required.

## Send Alerts to a Driver Right from the Automotive App

Stay connected with your drivers while they are on the go by sharing key notifications and alerts to the car's human machine interface (HMI) display. Service representatives at your automotive company can now quickly launch a service process from a Vehicle record page to send a message to a driver. They can also relate the message to a Salesforce record for additional context, such as a case, a milestone, or a service appointment. For example, the service representative can select a case record for a vehicle's software upgrade and add a message letting the driver know that the upgrade was successfully completed. A case is automatically created that helps the service representative track the service request for the remote notification.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Connected Vehicle Services is enabled. The org must also have the Vehicle Connected Services Yearly Per Unit Entitlement add-on license, which allows 1500 remote notifications yearly for each connected vehicle.

**Who:** Users must have the Connected Vehicle Services permission set assigned to them.

**How:** On a Vehicle record page, go to the Connected Services tab. In the Action Launcher, type in the name of the service process created from the Remote Vehicle Notifications and Alerts template. Select the action and add a notification message.

## Actionable Telematics Event Management

Connect events with conditions and actions, and drive declarative orchestrations for each event. Create qualification and evaluation rules for different event types originating in a vehicle or other external systems. Design an orchestration process that detects vehicle diagnostic codes sent by a telematics system, and performs actions based on preset conditions. You can create or update record alerts, cases, milestones, and appointments for events that vehicle telematics providers send to Automotive Cloud.

### IN THIS SECTION:

#### [Design Unique Orchestration Processes for Telematics Events](#)

Define event types and subtypes that represent the different telematics events for your vehicles, such as maintenance, emergency, or remote assistance events. Each event can also have multiple subtypes. For example, for an emergency event type, you can create an engine fault event, vehicle lock fault event, and brake malfunction event. You can then create specific actionable event orchestrations that define how conditions and rules are applied to the incoming event. Create orchestration processes based on expression sets, and use context definitions to represent the input and output parameters of the orchestration process.

#### [Automatically Match Telematics Events to an Orchestration](#)

Use the Filter and Match Actionable Event Orchestrations decision table to easily match internal and external events to the applicable orchestration process that determines the outcome and action. When an event is triggered, the decision table matches the event type and subtype and identifies the corresponding actionable event orchestration record. You can also define your own input criteria and output fields in the decision table.

#### [Represent Vehicle Fault Events Using a Predefined Context Definition](#)

Get a head start when you create actionable event orchestrations because now you don't need to create context definitions from scratch. The Vehicle Fault Event Detail context definition contains predefined mappings that can be used as input and output variables for an actionable event orchestration. This context definition is a perfect fit for orchestrations triggered by vehicle DTC (diagnostic trouble codes) data. The definition contains the required nodes and attributes that represent event, location, fault code, and signal information. The definition also contains attributes that help you trigger record alerts based on the fault event.

#### [Create and Update Automotive Records Based on Telematics Events](#)

Use the new Record Action custom element in an execution procedure to select which records you want to create or update based on real-time events. When you run an actionable event orchestration for a real-time event, the Record Action element triggers a create or update operation. For example, the action can update the status of a case when an engine issue is resolved, or create an asset milestone when a vehicle reaches 1,000 miles.

#### [Quickly Find Expression Sets for Event Orchestration](#)

Users create multiple expression sets to use as execution procedures for actionable event orchestrations. And if they don't create an expression set, the application automatically creates a procedure for them. Now users can simply use the Event Orchestration Procedures tab to find all expression sets of usage type Actionable Event Orchestration.

## Design Unique Orchestration Processes for Telematics Events

Define event types and subtypes that represent the different telematics events for your vehicles, such as maintenance, emergency, or remote assistance events. Each event can also have multiple subtypes. For example, for an emergency event type, you can create an engine fault event, vehicle lock fault event, and brake malfunction event. You can then create specific actionable event orchestrations that define how conditions and rules are applied to the incoming event. Create orchestration processes based on expression sets, and use context definitions to represent the input and output parameters of the orchestration process.



**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Actionable Event Orchestration is enabled.

**Who:** Users must have the Actionable Event Orchestration Designer, Context Service Admin, and Rules Engine Designer permission sets assigned to them.

**How:** From the App Launcher, find and select **Actionable Event Types, Actionable Event Subtypes, or Actionable Event Orchestrations**. Click **New**, and specify the details of the record.

### Automatically Match Telematics Events to an Orchestration

Use the Filter and Match Actionable Event Orchestrations decision table to easily match internal and external events to the applicable orchestration process that determines the outcome and action. When an event is triggered, the decision table matches the event type and subtype and identifies the corresponding actionable event orchestration record. You can also define your own input criteria and output fields in the decision table.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Actionable Event Orchestration Decision Table is enabled.

**Who:** Users must have the Actionable Event Orchestration Designer, and Rules Engine Designer permission sets assigned to them.

**How:** From the App Launcher, find and select **Lookup Tables**. Click **Filter and Match Actionable Event Orchestrations**, and activate the record.

### Represent Vehicle Fault Events Using a Predefined Context Definition

Get a head start when you create actionable event orchestrations because now you don't need to create context definitions from scratch. The Vehicle Fault Event Detail context definition contains predefined mappings that can be used as input and output variables for an actionable event orchestration. This context definition is a perfect fit for orchestrations triggered by vehicle DTC (diagnostic trouble codes) data. The definition contains the required nodes and attributes that represent event, location, fault code, and signal information. The definition also contains attributes that help you trigger record alerts based on the fault event.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Context Service and Actionable Event Orchestration are enabled.

**Who:** Users must have the Actionable Event Orchestration Designer and Context Service Admin permission sets assigned to them.

### Create and Update Automotive Records Based on Telematics Events

Use the new Record Action custom element in an execution procedure to select which records you want to create or update based on real-time events. When you run an actionable event orchestration for a real-time event, the Record Action element triggers a create or update operation. For example, the action can update the status of a case when an engine issue is resolved, or create an asset milestone when a vehicle reaches 1,000 miles.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Actionable Event Orchestration is enabled.

**Who:** Users must have the Actionable Event Orchestration Designer, and Rules Engine Designer permission sets assigned to them.

**How:** From the App Launcher, find and select **Actionable Event Orchestrations**. Select a record, and click **Open Procedure**. Drag the **Record Action** element to the builder, and specify the details.

### Quickly Find Expression Sets for Event Orchestration

Users create multiple expression sets to use as execution procedures for actionable event orchestrations. And if they don't create an expression set, the application automatically creates a procedure for them. Now users can simply use the Event Orchestration Procedures tab to find all expression sets of usage type Actionable Event Orchestration.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Actionable Event Orchestration is enabled.

**Who:** Users must have the Actionable Event Orchestration Designer, and Rules Engine Designer permission sets assigned to them.

**How:** From the App Launcher, find and select **Actionable Event Management**. Select the **Event Orchestration Procedures** tab.

## Data Cloud for Automotive Experiences

Unify your customer and vehicle data in Data Cloud, and connect data between external telematics systems and Automotive Cloud. Use the telematics data model objects to ingest real-time vehicle data into Data Cloud. Then harmonize the data to build segments, create calculated insights, and analyze key metrics. Use the Automotive data kit to access predefined calculated insights and data streams that help you drive personalized experiences and monitor customer and vehicle performance. You can also add the predefined flexcards to a Vehicle or an Account record page so that sales and service teams can visualize data stored in Data Cloud objects and calculated insights.

### IN THIS SECTION:

#### [Evaluate Vehicle and Driver Performance Telematics Data](#)

Bring telematics data from multiple external systems into Data Cloud by using the predefined asset and vehicle data model objects. Monitor and act on telematics data in real time, and track metrics such as battery health, ignition status, and speed. Improve driver safety by monitoring data over time and during each trip, and detect changes and automatically alert drivers about the potential safety issues. You can build insights and segments to analyze the telematics data and curate personalized experiences for your customers and drivers.

#### [Monitor E-Vehicle Charger Telematics Data](#)

Use the Vehicle Charger data model objects in Data Cloud to capture vital information about chargers and e-vehicles. Bring in data related to charging ports, charging stations, a single vehicle charging session, and aggregated charger performance over time. Represent general charging port specifications, unique instances of bases and connectors, and charging session data to build insights around maintenance and monitoring. Use the data model objects to aggregate data and create calculated insights to unveil trends and anomalies across charging sessions.

#### [Connect Data Cloud and Automotive Cloud Using Prebuilt Data Streams](#)

Create a bidirectional flow of data between Data Cloud and Automotive Cloud by using the data streams provided in the Automotive data kit. Send Automotive Cloud data to Data Cloud to build actionable insights, perform calculations, and create segments. Then bring back the transformed data into Automotive Cloud to help sales and service teams create personalized in-car experiences and improve customer journeys. You can regularly sync the data streams to send the most current data related to assets, vehicles, retail delivery reports, warranties, sales orders, and work orders to Data Cloud.

#### [Improve Sales and Service Experiences for Customers Using Calculated Insights](#)

Use predefined calculated insights in the Automotive data kit to view aggregated information about customer lifetime value, vehicle lifetime value, and customer satisfaction. Track the revenue from dealer sales, direct manufacturer sales, and sale of parts and accessories for each vehicle or customer. You can also track the count of all open cases and the count of open cases segmented by owner and vehicle.

#### [View Telematics Metrics On a Vehicle Page](#)

Show data that's stored in Data Cloud to your users who use the Automotive app. Add the Vehicle Data Model Objects Parent flexcard to the Vehicle record page so that sales and service teams can view telematics data directly in the app. The flexcard shows the latest values as synced from Data Cloud for ignition status, odometer reading, acceleration, cruise control status, and engine revolutions per minute. Users can also see the current latitude and longitude of the vehicle to monitor geofencing violations. The card also shows a line graph that traces the average speed over time. Users can filter the data on the card for different time periods.

### [Visualize Calculated Insights for a Vehicle](#)

Show insights that's stored in Data Cloud to your users who use the Automotive app. Add the Vehicle Calculated Insights Vehicle Page Parent Card flexcard to the Vehicle record page so that sales and service teams can view calculated insights directly in the app. The flexcard shows the latest values as synced from Data Cloud for vehicle lifetime value, the total count of cases, and the count of open cases. Sales teams can also compare the aggregated revenue from sales of vehicles versus sales of parts and accessories. Users can also compare the aggregated direct sales of vehicles from the manufacturer and the sales of vehicles from dealerships. Users can filter the data on the card for different time periods.

### [Visualize Calculated Insights for an Account](#)

Show insights that's stored in Data Cloud to your users who use the Automotive app. Add the Vehicle Calculated Insights Account Page Parent Card flexcard to the Account record page so that sales and service teams can view calculated insights directly in the app. The flexcard shows the latest values as synced from Data Cloud for customer lifetime value and the count of open cases. Users can filter the data on the card for different time periods.

## Evaluate Vehicle and Driver Performance Telematics Data

Bring telematics data from multiple external systems into Data Cloud by using the predefined asset and vehicle data model objects. Monitor and act on telematics data in real time, and track metrics such as battery health, ignition status, and speed. Improve driver safety by monitoring data over time and during each trip, and detect changes and automatically alert drivers about the potential safety issues. You can build insights and segments to analyze the telematics data and curate personalized experiences for your customers and drivers.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Data Cloud and Automotive are enabled.

**How:** In Data Cloud, on the Data Model tab, go to the All list view. Select one of the following telematics data model objects.

- Asset Operation
- Asset Telematics Event
- Asset Performance
- Asset Operation Operator Performance
- Operator Performance
- Telematics Provider
- Vehicle Trip
- Vehicle Telematics Event
- Vehicle Performance
- Vehicle Trip Driver Performance
- Driver Performance
- Event Fault Code Mapping

## Monitor E-Vehicle Charger Telematics Data

Use the Vehicle Charger data model objects in Data Cloud to capture vital information about chargers and e-vehicles. Bring in data related to charging ports, charging stations, a single vehicle charging session, and aggregated charger performance over time. Represent general charging port specifications, unique instances of bases and connectors, and charging session data to build insights around maintenance and monitoring. Use the data model objects to aggregate data and create calculated insights to unveil trends and anomalies across charging sessions.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Data Cloud and Automotive are enabled.

**How:** In Data Cloud, on the Data Model tab, go to the All list view. Select one of the following telematics data model objects.

- Vehicle Charger Base Definition
- Vehicle Charger Connector Definition
- Vehicle Charger Base
- Vehicle Charger Connector
- Vehicle Charging Session
- Vehicle Charging Session Interval
- Vehicle Charger Performance Summary
- Vehicle Charger Telematics Event

## Connect Data Cloud and Automotive Cloud Using Prebuilt Data Streams

Create a bidirectional flow of data between Data Cloud and Automotive Cloud by using the data streams provided in the Automotive data kit. Send Automotive Cloud data to Data Cloud to build actionable insights, perform calculations, and create segments. Then bring back the transformed data into Automotive Cloud to help sales and service teams create personalized in-car experiences and improve customer journeys. You can regularly sync the data streams to send the most current data related to assets, vehicles, retail delivery reports, warranties, sales orders, and work orders to Data Cloud.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Data Cloud and Automotive are enabled.

**Who:** Users must have access to the objects and fields for the data streams included in the Automotive Data Kit bundle.

**How:** In Data Cloud, on the Data Streams tab, go to the All list view. Select a data stream, such as Asset or Vehicle.

## Improve Sales and Service Experiences for Customers Using Calculated Insights

Use predefined calculated insights in the Automotive data kit to view aggregated information about customer lifetime value, vehicle lifetime value, and customer satisfaction. Track the revenue from dealer sales, direct manufacturer sales, and sale of parts and accessories for each vehicle or customer. You can also track the count of all open cases and the count of open cases segmented by owner and vehicle.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Data Cloud and Automotive are enabled.

**Who:** Users must have access to the objects and fields for the calculated insights included in the Automotive Data Kit bundle.

**How:** In Data Cloud, on the Calculated Insights tab, go to the All list view. Select a record, such as Vehicle Lifetime Value or Count Of Open Cases By Owner.

## View Telematics Metrics On a Vehicle Page

Show data that's stored in Data Cloud to your users who use the Automotive app. Add the Vehicle Data Model Objects Parent flexcard to the Vehicle record page so that sales and service teams can view telematics data directly in the app. The flexcard shows the latest values as synced from Data Cloud for ignition status, odometer reading, acceleration, cruise control status, and engine revolutions per minute. Users can also see the current latitude and longitude of the vehicle to monitor geofencing violations. The card also shows a line graph that traces the average speed over time. Users can filter the data on the card for different time periods.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Data Cloud and Automotive are enabled.

**Who:** Users must have the Data Cloud Metrics Visualization permission set assigned to them.

**How:** Add the Flexcard component to a Vehicle record page in the Lightning App Builder. Select the **Vehicle Data Model Objects Parent** flexcard and modify the section names and metric display names as required.

## Visualize Calculated Insights for a Vehicle

Show insights that's stored in Data Cloud to your users who use the Automotive app. Add the Vehicle Calculated Insights Vehicle Page Parent Card flexcard to the Vehicle record page so that sales and service teams can view calculated insights directly in the app. The flexcard shows the latest values as synced from Data Cloud for vehicle lifetime value, the total count of cases, and the count of open cases. Sales teams can also compare the aggregated revenue from sales of vehicles versus sales of parts and accessories. Users can also compare the aggregated direct sales of vehicles from the manufacturer and the sales of vehicles from dealerships. Users can filter the data on the card for different time periods.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Data Cloud and Automotive are enabled.

**Who:** Users must have the Data Cloud Metrics Visualization permission set assigned to them.

**How:** Add the Flexcard component to a Vehicle record page in the Lightning App Builder. Select the **Vehicle Calculated Insights Vehicle Page Parent Card** flexcard and modify the help text and display names as required.

## Visualize Calculated Insights for an Account

Show insights that's stored in Data Cloud to your users who use the Automotive app. Add the Vehicle Calculated Insights Account Page Parent Card flexcard to the Account record page so that sales and service teams can view calculated insights directly in the app. The flexcard shows the latest values as synced from Data Cloud for customer lifetime value and the count of open cases. Users can filter the data on the card for different time periods.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Data Cloud and Automotive are enabled.

**Who:** Users must have the Data Cloud Metrics Visualization permission set assigned to them.

**How:** Add the Flexcard component to a Vehicle record page in the Lightning App Builder. Select the **Vehicle Calculated Insights Account Page Parent Card** flexcard and modify the help text and display names as required.

## Supplier Recovery Claims

Streamline the process of raising supplier recovery claims for parts covered by contract terms with suppliers. Whenever quality issues arise in parts supplied by a partner, promptly initiate supplier recovery claims to recoup incurred costs. As a manufacturer, you can enhance the supplier recovery rate and substantially reduce warranty costs. You can now create a supplier recovery claim from an existing partner warranty claim. Suppliers can efficiently adjudicate these claims via the Experience Cloud site. The Claims Detail context definition has been updated to improve efficiency.

### IN THIS SECTION:

#### [Standardize Supplier Recovery Terms Using Contracts](#)

Use contracts to drive collaboration with your suppliers and mutually agree on supplier recovery terms. The contracts specify the price that a supplier reimburses you for a causal part, whether you must return a part to a supplier, and the recovery terms for repairs and replacements. When you create a supplier recovery claim from a partner warranty claim, the claimed amount for the supplier recovery claim is automatically derived from the contract.

### [Automatically Create Supplier Recovery Claims from Dealer Claims](#)

Create a supplier recovery claim for each causal part covered under a warranty claim now with a single click. You can create supplier recovery claims directly from the warranty claim record that a dealer submits. You can enhance the claim with additional information that a supplier requires during adjudication. Use the Summary tab of the supplier recovery claim to track information such as associated warranty terms and fault codes. Update the claimed amount and quantity before you submit the claim, or when you negotiate with suppliers.

### [Give Your Suppliers Visibility Into Claims](#)

Claim adjudicators at your supplier organizations can now use the Automotive Experience Cloud site to review the supplier recovery claims. After you submit a supplier recovery claim from the Automotive app, the suppliers can track the claims on their portal. The claim adjudicators can approve or reject claims, and access the contracts and products information directly from the Experience Cloud site.

### [Manage Claims with an Improved Context Definition](#)

The Claim Details context definition now has a simplified structure for ease of use. Retrieve claim information in business processes using the reduced number of nodes. Update your existing business processes that use the Claim Details context definition and use the new node structure.

## Standardize Supplier Recovery Terms Using Contracts

Use contracts to drive collaboration with your suppliers and mutually agree on supplier recovery terms. The contracts specify the price that a supplier reimburses you for a causal part, whether you must return a part to a supplier, and the recovery terms for repairs and replacements. When you create a supplier recovery claim from a partner warranty claim, the claimed amount for the supplier recovery claim is automatically derived from the contract.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions with Automotive Cloud. The user interface of this product is available in English only and may not be fully supported in other languages.

**Who:** Users must have the Warranty Lifecycle Management permission set license to use this feature.

## Automatically Create Supplier Recovery Claims from Dealer Claims

Create a supplier recovery claim for each causal part covered under a warranty claim now with a single click. You can create supplier recovery claims directly from the warranty claim record that a dealer submits. You can enhance the claim with additional information that a supplier requires during adjudication. Use the Summary tab of the supplier recovery claim to track information such as associated warranty terms and fault codes. Update the claimed amount and quantity before you submit the claim, or when you negotiate with suppliers.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions with Automotive Cloud. The user interface of this product is available in English only and may not be fully supported in other languages.

**Who:** Users must have the Warranty Lifecycle Management permission set license to use this feature.

## Give Your Suppliers Visibility Into Claims

Claim adjudicators at your supplier organizations can now use the Automotive Experience Cloud site to review the supplier recovery claims. After you submit a supplier recovery claim from the Automotive app, the suppliers can track the claims on their portal. The claim adjudicators can approve or reject claims, and access the contracts and products information directly from the Experience Cloud site.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions with Automotive Cloud. The user interface of this product is available in English only and may not be fully supported in other languages.

**Who:** Users must have the Warranty Lifecycle Management for Experience Cloud permission set license to use this feature.

## Manage Claims with an Improved Context Definition

The Claim Details context definition now has a simplified structure for ease of use. Retrieve claim information in business processes using the reduced number of nodes. Update your existing business processes that use the Claim Details context definition and use the new node structure.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions with Automotive Cloud. The user interface of this product is available in English only and may not be fully supported in other languages.

**Who:** Users must have the Warranty Lifecycle Management for Experience Cloud permission set license to use this feature.

## Product Service Campaigns for Vehicle and Parts Recalls

Organize product service campaigns to service faulty products, recall defective assets, and manage outreach campaigns at scale. Service managers can create and manage effective campaigns, nurture customer trust, and ensure customer safety. They can effortlessly segment and curate lists of impacted vehicle parts. Service agents can use these lists to engage with customers and track services to be performed on assets.

### IN THIS SECTION:

#### [Manage Asset Recalls and Upgrades At Scale](#)

Design timely product service campaigns to effectively assess and address issues on large numbers of products or services. Specify the impacted product, and the priority, duration, status, and type of a campaign. Create work orders and return orders to capture the services to be performed on impacted products.

#### [Segment Assets for Product Service Campaigns Easily](#)

Automotive service teams are no longer required to identify faulty assets and individually add them to product service campaigns. Service managers can now identify, segment, and add a large number of assets in an actionable list. Easily curate lists of assets to recall, audit, fix, or upgrade, and with a single click, add items from actionable lists to product service campaigns. Service managers can use filter conditions or Data Cloud segments to group assets that are included in actionable lists. Finally, they can assign the lists to service agents for engagement initiatives and outreach campaigns.

## Manage Asset Recalls and Upgrades At Scale

Design timely product service campaigns to effectively assess and address issues on large numbers of products or services. Specify the impacted product, and the priority, duration, status, and type of a campaign. Create work orders and return orders to capture the services to be performed on impacted products.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions with Automotive Cloud. The user interface of this product is available in English only and may not be fully supported in other languages.

**Who:** Users must have the Product Service Campaign permission set license to use this feature.

**How:** Create a Product Service Campaign record, and specify its details. Create Product Service Campaign Item records and relate them to the product service campaign. Create a Return Order or a Work Order record from the related list of a product service campaign record.

## Segment Assets for Product Service Campaigns Easily

Automotive service teams are no longer required to identify faulty assets and individually add them to product service campaigns. Service managers can now identify, segment, and add a large number of assets in an actionable list. Easily curate lists of assets to recall, audit, fix, or upgrade, and with a single click, add items from actionable lists to product service campaigns. Service managers can use filter conditions or Data Cloud segments to group assets that are included in actionable lists. Finally, they can assign the lists to service agents for engagement initiatives and outreach campaigns.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions with Automotive Cloud. The user interface of this product is available in English only and may not be fully supported in other languages.

**Who:** This feature is available to users who have the Product Service Campaign permission set license.

**How:** On a Product Service Campaign record page, click **Create Actionable List**. Create an actionable list and click **Add to Service Campaign**.

## Automotive Foundational Enhancements

Make the most of the additional enhancements in Automotive Cloud. Action Launcher is now available in Experience Cloud, new fields are added to Vehicle and Asset, and users can create quote actions for assets.

### IN THIS SECTION:

#### [Help Partners and Customers Launch Actions from the Experience Cloud Site](#)

The Action Launcher component is now available with the Automotive template for Experience Cloud. Add the Action Launcher component to a page using the Experience Cloud Builder after you create a site using the Automotive template. Your dealers, suppliers, customers, and partners can use the action launcher to trigger flow-based, omniscrypt-based, or quick-action-based processes.

#### [Specify the External System Name and Identifier for Vehicles and Parts](#)

A Vehicle or an Asset record in the Automotive app can also reside in an external telematics system, an order intake system, or a dealer management system. Use the two new fields Source System Name and Source System Identifier to specify the name of an external system and the ID of an asset or a vehicle in that system. You can easily map data between Salesforce and external systems, and use the fields during integrations.

#### [Track Repair and Maintenance Costs for Assets Using Quotes](#)

Use the new Asset field on a Quote Action record to track the estimated cost of products or services you offer to a customer. For example, track the cost of repairing a faulty part and share the quote with the customer to get a confirmation before a service agent starts the work.

## Help Partners and Customers Launch Actions from the Experience Cloud Site

The Action Launcher component is now available with the Automotive template for Experience Cloud. Add the Action Launcher component to a page using the Experience Cloud Builder after you create a site using the Automotive template. Your dealers, suppliers, customers, and partners can use the action launcher to trigger flow-based, omniscrypt-based, or quick-action-based processes.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Automotive is enabled.

**Who:** Users must have the Automotive Foundation for Experience Cloud permission set assigned to them.

**How:** In Setup, go to **All Sites**. Click **Builder** for a site and add the Action Launcher component to a record page or the Home page.

## Specify the External System Name and Identifier for Vehicles and Parts

A Vehicle or an Asset record in the Automotive app can also reside in an external telematics system, an order intake system, or a dealer management system. Use the two new fields Source System Name and Source System Identifier to specify the name of an external system and the ID of an asset or a vehicle in that system. You can easily map data between Salesforce and external systems, and use the fields during integrations.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Automotive is enabled.

**Who:** Users must have Create access on Vehicle and Asset objects.



## Track Repair and Maintenance Costs for Assets Using Quotes

Use the new Asset field on a Quote Action record to track the estimated cost of products or services you offer to a customer. For example, track the cost of repairing a faulty part and share the quote with the customer to get a confirmation before a service agent starts the work.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Automotive is enabled.

**Who:** Users must have Create access on Quote, Quote Action, and Asset objects.

## 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 and increase operational efficiencies. Explore industry-specific apps including Enterprise Sales Management, Communications Cloud Agent Console, and Multiplay Subscription Management, and business solutions including Field Service for Industries, Configure, Price, Quote (Industries CPQ), and Enterprise Product Catalog (EPC).

Learn about what's in this release in the [Communications Cloud](#).

## Connected Assets

Modernize your asset management operations, optimize asset performance, and proactively maintain your assets by using Connected Assets. Visualize an asset's health and performance metrics and trigger workflows for asset faults and events. Act on telematics data such as sensor calibration issues or battery issues in real time by using Actionable Event Orchestration. Track usage-based entitlements for connected assets.

### IN THIS SECTION:

#### [Actionable Event Orchestration](#)

Define the actions to be performed for actionable events generated by assets by creating actionable event orchestrations. Create qualification and evaluation rules for different types of actionable events that are generated in assets. Design an orchestration process that detects asset fault codes that an external system sends, and perform actions based on preset conditions. For example, create and update work orders, asset milestones, and cases for sensor fault events that assets send to Salesforce.

#### [Data Cloud Metrics and Calculated Insights Visualization](#)

Visualize asset data that's stored in Data Cloud to improve asset maintenance schedules, identify potential issues, and maximize operational performance. Surface calculated insights on record pages by using the Data Cloud Visualization Calculated Insights Parent Card Flexcard. View metrics and line charts based on asset data stored in data model objects on record pages by using Data Cloud Visualization Parent Card Flexcard.

#### [Minimize Downtime with Asset Health Score](#)

Combine the capabilities of Data Cloud and CRM Analytics to gain data-driven insights and proactive service recommendations. The Proactive Asset Service monitors asset age, usage, and maintenance history, and then updates the Asset Health Score dashboard to indicate whether an asset is in good, fair, or critical condition. Receive a notification when an asset needs attention. Notifications let you easily identify asset performance and proactively address upcoming issues, ensuring uninterrupted operations and optimized performance.

## Actionable Event Orchestration

Define the actions to be performed for actionable events generated by assets by creating actionable event orchestrations. Create qualification and evaluation rules for different types of actionable events that are generated in assets. Design an orchestration process that detects asset fault codes that an external system sends, and perform actions based on preset conditions. For example, create and update work orders, asset milestones, and cases for sensor fault events that assets send to Salesforce.

### IN THIS SECTION:

#### [Create Sophisticated Orchestration Processes for Asset Events](#)

Define the types and subtypes of the different actionable events, such as fault, emergency, or warning, for your assets. Design actionable event orchestrations to outline the types of actions to be taken for events with specific types and subtypes. Create execution procedures to define the conditions, rules, and actions to apply to incoming events. Use event data in execution procedures by associating a context definition with an actionable event orchestration. For example, create an actionable event orchestration that creates an asset milestone for an event with the asset malfunction type and sensor recalibration subtype.

#### [Automatically Match Asset Events to Actionable Event Orchestrations](#)

Easily determine the actions to be taken for internal and external events by using the Filter and Match Actionable Event Orchestrations decision table. When an event is triggered, the decision table matches the event type and subtype and identifies the corresponding actionable event orchestration record. The actionable event orchestration record contains details of the execution procedure type, execution procedure, context definition, and context mapping. You can also define your own input criteria and output fields in the decision table.

#### [Define Rules to Create and Update Records Based on Asset Events](#)

Specify the records to be created and updated based on asset events by using the new Record Action element in an execution procedure. When you run an actionable event orchestration for a real-time event, the Record Action element triggers a create or update operation. For example, you can create execution procedures that create a work order when a generator has a critical fault. Or you can update the status of a case record when a conveyor belt completes its firmware upgrade.

#### [Easily Find and Use Expression Sets for Event Orchestration](#)

Users create multiple expression sets to define the actions to be performed for actionable event orchestrations. And if they don't create an expression set, the application automatically creates a procedure for them. Users can find all the expression sets of the Actionable Event Orchestration usage type on the Event Orchestration Procedures tab.

## Create Sophisticated Orchestration Processes for Asset Events

Define the types and subtypes of the different actionable events, such as fault, emergency, or warning, for your assets. Design actionable event orchestrations to outline the types of actions to be taken for events with specific types and subtypes. Create execution procedures to define the conditions, rules, and actions to apply to incoming events. Use event data in execution procedures by associating a context definition with an actionable event orchestration. For example, create an actionable event orchestration that creates an asset milestone for an event with the asset malfunction type and sensor recalibration subtype.

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

**Who:** Users must have the Actionable Event Orchestration Designer, Context Service Admin, and Rules Engine Designer permission sets.

**How:** From the App Launcher, find and select **Actionable Event Types**, **Actionable Event Subtypes**, or **Actionable Event Orchestrations**. Click **New**, and specify the details of the record.

## Automatically Match Asset Events to Actionable Event Orchestrations

Easily determine the actions to be taken for internal and external events by using the Filter and Match Actionable Event Orchestrations decision table. When an event is triggered, the decision table matches the event type and subtype and identifies the corresponding actionable event orchestration record. The actionable event orchestration record contains details of the execution procedure type, execution procedure, context definition, and context mapping. You can also define your own input criteria and output fields in the decision table.

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

**Who:** Users must have the Actionable Event Orchestration Designer and Rules Engine Designer permission sets.

**How:** From the App Launcher, find and select **Lookup Tables**. Click **Filter and Match Actionable Event Orchestrations**, and activate the record.

## Define Rules to Create and Update Records Based on Asset Events

Specify the records to be created and updated based on asset events by using the new Record Action element in an execution procedure. When you run an actionable event orchestration for a real-time event, the Record Action element triggers a create or update operation. For example, you can create execution procedures that create a work order when a generator has a critical fault. Or you can update the status of a case record when a conveyor belt completes its firmware upgrade.

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

**Who:** Users must have the Actionable Event Orchestration Designer and Rules Engine Designer permission sets.

**How:** From the App Launcher, find and select **Actionable Event Orchestrations**. Select a record, and click **Open Procedure**. Drag the **Record Action** element to the builder, and specify the details.

## Easily Find and Use Expression Sets for Event Orchestration

Users create multiple expression sets to define the actions to be performed for actionable event orchestrations. And if they don't create an expression set, the application automatically creates a procedure for them. Users can find all the expression sets of the Actionable Event Orchestration usage type on the Event Orchestration Procedures tab.

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

**Who:** Users must have the Actionable Event Orchestration Designer and Rules Engine Designer permission sets.

**How:** From the App Launcher, find and select **Actionable Event Management**. Select the **Event Orchestration Procedures** tab.

## Data Cloud Metrics and Calculated Insights Visualization

Visualize asset data that's stored in Data Cloud to improve asset maintenance schedules, identify potential issues, and maximize operational performance. Surface calculated insights on record pages by using the Data Cloud Visualization Calculated Insights Parent Card Flexcard. View metrics and line charts based on asset data stored in data model objects on record pages by using Data Cloud Visualization Parent Card Flexcard.

### IN THIS SECTION:

[View Asset Metrics on a Record Page](#)

Analyze patterns and review trends on asset performance by viewing visualizations on asset data that's stored in data model objects in Data Cloud. Add the Data Cloud Visualization Parent Card Flexcard to the Asset record page or any other page so that your teams can easily view the asset data visualisations. The Flexcard shows metrics and a line graph from the selected data model objects.

### [View Asset Calculated Insights on Record Pages](#)

Show the calculated insights on assets, such as lifetime value and count of cases, that are stored in Data Cloud, on a record page. Add the Data Cloud Visualization Calculated Insights Parent Card Flexcard to a record page so that your teams can view the calculated insights without any hassle.

## View Asset Metrics on a Record Page

Analyze patterns and review trends on asset performance by viewing visualizations on asset data that's stored in data model objects in Data Cloud. Add the Data Cloud Visualization Parent Card Flexcard to the Asset record page or any other page so that your teams can easily view the asset data visualisations. The Flexcard shows metrics and a line graph from the selected data model objects.

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

**Who:** Users must have the Data Cloud Metrics Visualization permission set assigned to them.

**How:** Add the Flexcard component to the required record page in the Lightning App Builder. Select the DataCloudVisualizationParentCard Flexcard and modify the section names and metric display names as required.

## View Asset Calculated Insights on Record Pages

Show the calculated insights on assets, such as lifetime value and count of cases, that are stored in Data Cloud, on a record page. Add the Data Cloud Visualization Calculated Insights Parent Card Flexcard to a record page so that your teams can view the calculated insights without any hassle.

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

**Who:** Users must have the Data Cloud Metrics Visualization permission set assigned to them.

**How:** Add the Flexcard component to the required record page in the Lightning App Builder. Select the DataCloudVisualizationCalculatedInsightsParentCard Flexcard and modify the help text and display names as required.

## Minimize Downtime with Asset Health Score

Combine the capabilities of Data Cloud and CRM Analytics to gain data-driven insights and proactive service recommendations. The Proactive Asset Service monitors asset age, usage, and maintenance history, and then updates the Asset Health Score dashboard to indicate whether an asset is in good, fair, or critical condition. Receive a notification when an asset needs attention. Notifications let you easily identify asset performance and proactively address upcoming issues, ensuring uninterrupted operations and optimized performance.

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

**How:** To enable Proactive Asset Service, in Setup, go to Proactive Asset Service Setup and complete the required setup steps. Enable CRM Analytics, and turn on Proactive Asset Service.

SEE ALSO:

[Salesforce Help: Proactive Asset Service \(can be outdated or unavailable during release preview\)](#)

## Consumer Goods Cloud

Transfer data from Consumer Goods Cloud to Data Cloud by using data streams. Leverage the integrated data to segment retail customers and strategize planning activities. Use the Direct Store Delivery and Van Sales features to streamline your delivery and distribution processes. Conveniently administer sync features from a central location and improve traceability of sync records by using sync ID. Use the Modeler CLI command to quickly add a validation method and use the dynamically proposed XML attributes to accurately customize contracts. You can now do better precision rounding for KPIs with the Rounding within Period rounding type, and run the Push Promotion process faster.

### IN THIS SECTION:

#### [Consolidate Your Customer Data with Data Cloud for Consumer Goods](#)

Install Data Cloud for Consumer Goods Data Kit to deploy data streams and connect to pre-configured data model objects (DMOs) in Data Cloud. Use the data streams to ingest data from Consumer Goods Cloud to Data Cloud, and use the integrated data to segment retail customers and strategize planning activities.

#### [Retail Execution](#)

Set up routes and tours for the Direct Store Delivery and Van Sales process. A tour driver can start the tour and complete an initial set of tour activities on the Consumer Goods Cloud offline mobile app. Capture store performance efficiently by using picklist options for a set of parameters called Assessment Indicator Definitions (for example, the count of a product on a shelf, or product facings on a shelf).

#### [Sync Management](#)

Administer sync features from a central location and benefit from the optimized sync capabilities for an enhanced sync experience.

#### [Visual Studio Code Based Modeler](#)

Customize contracts accurately with dynamically proposed XML attributes and add validation methods quickly using Modeler CLI command.

#### [Trade Promotion Management](#)

Achieve precise rounding and retain the adjustments that you make for a KPI for a period with the Rounding within Period rounding type. You can now execute Push Promotions faster, and easily extract claim data and download promotion data in shareable CSV formats.

#### [Manage Permission Sets Efficiently](#)

Assign the new permission sets, such as TPM Funds Calculation Worker and CGCloud Retail Supervisor User, to users, and save yourself the hassle of managing permission sets every time you upgrade to the latest version of the Consumer Goods managed package. The new permission sets are now shipped with the managed package and are automatically updated whenever the managed package is upgraded.

#### [Other Changes in Consumer Goods Cloud](#)

Learn about the other changes for Consumer Goods Cloud in Summer '24.

## Consolidate Your Customer Data with Data Cloud for Consumer Goods

Install Data Cloud for Consumer Goods Data Kit to deploy data streams and connect to pre-configured data model objects (DMOs) in Data Cloud. Use the data streams to ingest data from Consumer Goods Cloud to Data Cloud, and use the integrated data to segment retail customers and strategize planning activities.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions where Data Cloud for Consumer Goods is enabled.

## Retail Execution

Set up routes and tours for the Direct Store Delivery and Van Sales process. A tour driver can start the tour and complete an initial set of tour activities on the Consumer Goods Cloud offline mobile app. Capture store performance efficiently by using picklist options for a set of parameters called Assessment Indicator Definitions (for example, the count of a product on a shelf, or product facings on a shelf).

### IN THIS SECTION:

#### [Plan Tours and Start Tours Activities Efficiently](#)

With Direct Store Delivery and Van Sales, deliver consumer goods products directly to retail customers and manage deliveries seamlessly. Set up tours and routes for specific markets by using the Direct Store Delivery data model. Direct store delivery drivers can load their vehicles and start the delivery process by following the tour schedule.

#### [Get Meaningful Recommendations with Account Summarization \(Beta\)](#)

Use generative AI in Consumer Goods Cloud to get a comprehensive summary of an account. Select a suggested action (for example, summarize account) or post a question in the Einstein Bot, which uses the consumer goods cloud data to derive the account summary. Account summary provides insights on account compliance, a recap of recent orders or visit transactions, and account performance data. Account summary helps your users respond to customer queries, cross-sell or up-sell based on promotions, and act on account compliance such as out-of-stock issues.

#### [Capture Store-Related Data Easily](#)

Enable your sales reps or supervisors to choose a picklist option during a store visit for comparison with the target value. Configure the picklist values for a visit assessment task to help your users measure store performance more flexibly.

#### [Share Visit is Retiring](#)

The Share Visit setting is scheduled for retirement in Spring '25. After the upgrade to Spring '25, you can no longer see the Share visits feature under Retail Execution Settings in Setup and visit access will be available only for the users who created the visit as per the platform's behavior. You can implement custom sharing by using the platform's sharing capabilities such as sharing rules and role-based hierarchy or change the ownership of the visit record to the appropriate user. To avoid loss of visit data, complete the required custom sharing implementation and turn off the share visit setting before the Spring '25 upgrade.

#### [New and Changed Objects in Retail Execution](#)

Do more with the new and updated Retail Execution objects.

## Plan Tours and Start Tours Activities Efficiently

With Direct Store Delivery and Van Sales, deliver consumer goods products directly to retail customers and manage deliveries seamlessly. Set up tours and routes for specific markets by using the Direct Store Delivery data model. Direct store delivery drivers can load their vehicles and start the delivery process by following the tour schedule.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions where Consumer Goods Cloud is enabled.

**Who:** To set up routes and tours on the Consumer Goods Cloud Desktop app, you need the Direct Store Delivery for Consumer Goods Cloud Offline Mobile App permission set. To use the Driver and the Tour Cockpit on the Consumer Goods Cloud offline mobile app, you need the CGCloud Tour Driver permission set.

**How:**

- Plan and set up routes and tours for direct store delivery and van sales drivers by using tour templates on the Consumer Goods Cloud Desktop app. Post setup, create tours independently, or derive them from a route. Define the allowed vehicles and document types for a tour, and the safety and vehicle checks that drivers must complete at the start of the tour. You can even add a sequence of customers to a route, or create a sequence of visits for a tour.

- On the Consumer Goods Cloud offline mobile app, direct store delivery or van sales drivers can start a tour and perform start of the day activities such as reviewing tour and vehicle details, reviewing the tour visits, and validating the truckload based on the inventory check-out document.

## Get Meaningful Recommendations with Account Summarization (Beta)

Use generative AI in Consumer Goods Cloud to get a comprehensive summary of an account. Select a suggested action (for example, summarize account) or post a question in the Einstein Bot, which uses the consumer goods cloud data to derive the account summary. Account summary provides insights on account compliance, a recap of recent orders or visit transactions, and account performance data. Account summary helps your users respond to customer queries, cross-sell or up-sell based on promotions, and act on account compliance such as out-of-stock issues.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions where Consumer Goods Cloud is enabled and setup for Einstein Bots is available.



**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:** Define three custom Apex invocable functions to retrieve performance, compliance, and transactional data from the Account and its related entities as part of the Consumer Goods Cloud Managed package. Use the configuration variables in the apex classes to configure the duration and number of orders or visits for an account summarization. After adding the apex classes, create prompt templates with the prompt type as Record Summary and status as Active.

SEE ALSO:

[Salesforce Help: Manage Apex Classes \(can be outdated or unavailable during release preview\)](#)

[Apex Developer Guide: Invocable Actions \(can be outdated or unavailable during release preview\)](#)

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

[Salesforce Help: Copilot Action: Summarize Record \(can be outdated or unavailable during release preview\)](#)

## Capture Store-Related Data Easily

Enable your sales reps or supervisors to choose a picklist option during a store visit for comparison with the target value. Configure the picklist values for a visit assessment task to help your users measure store performance more flexibly.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions where Consumer Goods Cloud is enabled.

**How:** Use Assessment Indicator Defined Value to configure the picklist options for an Assessment Indicator Definition of an assessment task. Provide a target value in Assessment Indicator Value by associating the Retail Store KPI with the Assessment Indicator Defined Values.

## Share Visit is Retiring

The Share Visit setting is scheduled for retirement in Spring '25. After the upgrade to Spring '25, you can no longer see the Share visits feature under Retail Execution Settings in Setup and visit access will be available only for the users who created the visit as per the platform's behavior. You can implement custom sharing by using the platform's sharing capabilities such as sharing rules and role-based hierarchy or change the ownership of the visit record to the appropriate user. To avoid loss of visit data, complete the required custom sharing implementation and turn off the share visit setting before the Spring '25 upgrade.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions where Consumer Goods Cloud is enabled.

SEE ALSO:

[Salesforce Help: Sharing Rules](#)

[Apex Developer Guide: Understanding Apex Managed Sharing](#)

[Trailhead Module: Data Security](#)

## New and Changed Objects in Retail Execution

Do more with the new and updated Retail Execution objects.

Use these tour and route custom objects in Retail Execution to support the Direct Store Delivery and Van Sales feature.

### Set up route types for various markets

Use the `cgcloud__Route_Template__c` object.

### Create routes that act as a blueprint for creating tours

Use the `cgcloud__Route__c` object.

### Add customers to a route

Use the `cgcloud__Route_Account__c` object.

### Create executable trips

Use the `cgcloud__Tour__c` object.

### Create or edit the vehicle and security checks of a tour

Use the `cgcloud__Tour_Check__c` object.

### Define the allowed visits, signatures, and document types of a tour

Use the `cgcloud__Tour_Object_Reference__c` object.

### Define tour settings for various markets

Use the `cgcloud__Tour_Template__c` object.

### Store object references of a tour template

Use the `cgcloud__Tour_Template_Object_Reference__c` object.

### Associate tour checks with a tour template

Use the `cgcloud__Tour_Template_Tour_Check__c` object.

### Store the relationship between a tour and a tour check

Use the `cgcloud__Tour_Tour_Check__c` object.

### Store the vehicle details

Use the `cgcloud__Vehicle__c` object.

### Store the relationship between a vehicle and a warehouse

Use the `cgcloud__Vehicle_Warehouse__c` object.

### Validate the driver's GPS location against the warehouse location at the end of the day

Use the new `cgcloud__Should_Allow_End_Day_Geofencing__c` field on the `cgcloud__Tour_Template__c` and the `cgcloud__Tour__c` objects.

### Enable GPS tracking for a tour at the end of the day

Use the new `cgcloud__Should_Allow_End_Day_GPS_Tracking__c` field on the `cgcloud__Tour_Template__c` and the `cgcloud__Tour__c` objects.



**Enable time tracking for a tour at the end of the day**

Use the new `cgcloud__Should_Allow_End_Day_Time_Tracking__c` field on the `cgcloud__Tour_Template__c` and the `cgcloud__Tour__c` objects.

**Determine whether the user must scan seals when the Express Check-Out field is selected**

Use the new `cgcloud__Should_Allow_Seal_Scanning__c` field on the `cgcloud__Tour_Template__c` and the `cgcloud__Tour__c` objects.

**Validate the driver's GPS location against the warehouse location at the start of the day**

Use the new `cgcloud__Should_Allow_Start_Day_Geofencing__c` field on the `cgcloud__Tour_Template__c` and the `cgcloud__Tour__c` objects.

**Enable GPS tracking for a tour at the start of the day**

Use the new `cgcloud__Should_Allow_Start_Day_GPS_Tracking__c` field on the `cgcloud__Tour_Template__c` and the `cgcloud__Tour__c` objects.

**Enable time tracking for a tour at the start of the day**

Use the new `cgcloud__Should_Allow_Start_Day_Time_Tracking__c` field on the `cgcloud__Tour_Template__c` and the `cgcloud__Tour__c` objects.

**Determine the platform that the user can create a tour on**

Use the new `cgcloud__Creation_Platform__c` field on the `cgcloud__Tour_Template__c` and the `cgcloud__Tour__c` objects.

**Set the default duration of a visit in a tour**

Use the new `cgcloud__Default_Tour_Visit_Duration__c` field on the `cgcloud__Tour_Template__c` and the `cgcloud__Tour__c` objects.

**Determine whether the user is required to document the odometer reading at the start and end of the day with a picture**

Use the new `cgcloud__Is_Odometer_Photo_Required__c` field on the `cgcloud__Tour_Template__c` and the `cgcloud__Tour__c` objects.

**Set the maximum distance allowed between the driver's GPS location and the warehouse or customer's location during the start, end, or visit of a tour**

Use the new `cgcloud__Geofence_Distance__c` field on the `cgcloud__Sales_Organization__c` object.

**Define the type of product check-in at the end of a tour**

Use the new `cgcloud__Product_Check_In_Policy__c` field on the `cgcloud__Order_Template__c` object.

**Define the type of product check-out document**

Use the new `cgcloud__Check_Out_Type__c` field on the `cgcloud__Order_Template__c` object.

## Sync Management

Administer sync features from a central location and benefit from the optimized sync capabilities for an enhanced sync experience.

### IN THIS SECTION:

#### [Centrally Administer Your Sync Experience](#)

Get a consolidated view of the most relevant sync features and manage the feature settings on the Sync Settings page. Determine the usage of those sync features for your users. Optimize your sync experience by downloading only relevant incremental data and setting a threshold on the maximum users who can sync simultaneously. Trace sync logs using unique IDs and resolve sync configuration issues by sending sync-related KPIs to Salesforce.

#### [Expedite Sync Using Optimized Named Fetch Trees](#)

Save on data volume and the time taken to download data as well as avoid redundant data transfers by downloading incremental REST-based named fetch trees updates.

#### [Identify Sync Records in Logs Easily with Sync IDs](#)

Use the unique ID assigned to each synchronization operation to improve your debugging and troubleshooting experience. With the sync ID appended to the logs, you can easily filter and trace sync transactions and plan necessary actions.

#### [Process Simultaneous Sync Request Load Efficiently](#)

Configure the maximum number of concurrent users on the Sync Configuration tab. Prevent overloading the system and maintain optimal performance when the number of sales reps initiating sync simultaneously from their mobile devices exceeds the configured limit.

#### [Improve Support for Solving Sync Issues by Logging Extended Sync KPIs](#)

Get better support and assistance to analyze and resolve your sync configuration issues by sending sync-related KPIs to Salesforce. Sync admins can review the KPIs collected for a sync process and take actions to optimize sync performance. Improve support for solving sync issues by logging extended sync KPIs

#### [Include CPU Calculation Time in APEX Calculation](#)

Protect your system from reaching potential Apex CPU governance limit exceptions by incorporating a buffer in the calculation of sync execution time.

#### [New and Changed Objects in Consumer Goods Cloud Sync](#)

Do more with the new and updated objects in Consumer Goods Cloud Sync Management.

## Centrally Administer Your Sync Experience

Get a consolidated view of the most relevant sync features and manage the feature settings on the Sync Settings page. Determine the usage of those sync features for your users. Optimize your sync experience by downloading only relevant incremental data and setting a threshold on the maximum users who can sync simultaneously. Trace sync logs using unique IDs and resolve sync configuration issues by sending sync-related KPIs to Salesforce.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions where Consumer Goods Cloud is enabled.

**How:** The new and enhanced sync features are enabled by default for all users in the new installations of Summer '24, except the Calculate sync time with CPU time setting. Existing users must manually enable the enhanced sync settings each time they upgrade the Sync Management app. From the App Launcher, find and select **Sync Configuration**. Click **Sync Settings**, and on the Sync Settings page, configure your sync processes.

**Sync Management** | Device Status Overview | Sync History | Device Events Log | Sync Configuration | More

## Sync Settings

Maximize efficiency, traceability, and performance of your sync processes.

[Save](#) [Back](#)

### General Settings

Optimize sync performance and improve troubleshooting support for sync issues.

- Calculate sync time with CPU time
- Include sync ID in logs
- Queue sync users at maximum limit
- Validate inputs

### User Settings

#### Include KPIs in sync logs

Add extended sync KPIs to logs to help solve sync issues and gain insights into sync health and performance.

- Include KPIs in sync logs
- Enable for Users:

#### Sync using enhanced NFT over REST

Download incremental REST based NFT updates to reduce the download time and data volume, and avoid redundant data transfers.

- Sync using enhanced NFT over REST
- Enable for Users:
- Specify a User:

| USER        |
|-------------|
| Tour Driver |

SEE ALSO:

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

## Expedite Sync Using Optimized Named Fetch Trees

Save on data volume and the time taken to download data as well as avoid redundant data transfers by downloading incremental REST-based named fetch trees updates.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions where Consumer Goods Cloud is enabled.

**Why:** The enhancement in downloading and calculating data for the named fetch trees marked as REST-based helps greatly reduce your sync time and make the sync process performant.

**How:** From the App Launcher, find and select **Sync Configuration**. Click **Sync Settings**. In the User Settings section, select the **Sync using enhanced NFT over REST** checkbox. This setting is enabled for all users by default. You can enable this setting for specific users as needed. Switch named fetch trees to SF REST Enabled to take advantage of this enhancement.

SEE ALSO:

[Salesforce Help: Sync Using Enhanced Named Fetch Trees over REST \(can be outdated or unavailable during release preview\)](#)

## Identify Sync Records in Logs Easily with Sync IDs

Use the unique ID assigned to each synchronization operation to improve your debugging and troubleshooting experience. With the sync ID appended to the logs, you can easily filter and trace sync transactions and plan necessary actions.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions where Consumer Goods Cloud is enabled.

**Why:** When a sales rep encounters a sync error on their mobile device, the unique sync ID in the error message helps the admin troubleshoot the issue better. The admin uses the sync ID to identify the relevant log records from the device logs and Salesforce logs and provide the appropriate resolution.

**How:** From the App Launcher, find and select **Sync Configuration**. Click **Sync Settings**. In the General Settings section, select the **Include sync ID in logs** checkbox. This setting is enabled by default.

SEE ALSO:

[Salesforce Help: Include Sync IDs in Logs \(can be outdated or unavailable during release preview\)](#)

## Process Simultaneous Sync Request Load Efficiently

Configure the maximum number of concurrent users on the Sync Configuration tab. Prevent overloading the system and maintain optimal performance when the number of sales reps initiating sync simultaneously from their mobile devices exceeds the configured limit.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions where Consumer Goods Cloud is enabled.

**Why:** When the setting is enabled, the sync process queues the excess sync requests. By using the sales rep's device details, the sync process notifies the sales rep about the queued request and their queue position. This feature is supported with first-sync-of-the-day (FSOD) and initial sync operations only.

**How:** From the App Launcher, find and select **Sync Configuration**. Click **Sync Settings**. In the General Settings section, select the **Queue sync users at maximum limit** checkbox. This setting is enabled by default.

SEE ALSO:

[Salesforce Help: Queue Sync Users at Maximum Limit \(can be outdated or unavailable during release preview\)](#)

## Improve Support for Solving Sync Issues by Logging Extended Sync KPIs

Get better support and assistance to analyze and resolve your sync configuration issues by sending sync-related KPIs to Salesforce. Sync admins can review the KPIs collected for a sync process and take actions to optimize sync performance. Improve support for solving sync issues by logging extended sync KPIs

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions where Consumer Goods Cloud is enabled.

**Why:** You can identify potential sync limitations for their users or investigate and troubleshoot sync issues. The sync engine collects and stores sync-related KPIs in a compressed format when a sync operation is initiated from a mobile device. The KPI data includes metrics such as duration and record count for named fetch trees, named queries, and tracked objects.

**How:** From the App Launcher, find and select **Sync Configuration**. Click **Sync Settings**. In the User Settings section, select the **Include KPIs in sync logs** checkbox. This setting is enabled for all users by default. You can enable this setting for specific users as needed.

SEE ALSO:

[Salesforce Help: Include KPIs in Sync Logs \(can be outdated or unavailable during release preview\)](#)

## Include CPU Calculation Time in APEX Calculation

Protect your system from reaching potential Apex CPU governance limit exceptions by incorporating a buffer in the calculation of sync execution time.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions where Consumer Goods Cloud is enabled.

**Why:** Configure the time to deduct from the org's governance limit for CPU utilization. When you configure this setting, the system includes the CPU calculation time during the calculation of the start time of sync transactions.

**How:** From the App Launcher, find and select **Sync Configuration**. Click **Sync Settings**. In the General Settings section, select the **Calculate sync time with CPU time** checkbox. This setting is disabled by default.

SEE ALSO:

[Salesforce Help: Calculate Sync Time with CPU Time \(can be outdated or unavailable during release preview\)](#)

## New and Changed Objects in Consumer Goods Cloud Sync

Do more with the new and updated objects in Consumer Goods Cloud Sync Management.

**Store details of the Consumer Goods Cloud offline mobile app device that a sync request to Salesforce was initiated from**

Use the new `Sync_Client_Registration` object.

**Store the unique ID of the sync operation request initiated from a Consumer Goods Cloud offline mobile app device**

Use the `Sync_Id` field in the `Sync_Mobile_App_Log`, `Sync_History`, and `Sync_API_Log` objects.

**Store KPI data in a compressed format when a sync operation is run. The KPI data includes metrics such as duration and record count for named fetch trees, named queries, and tracked objects**

Use the `Sync_KPIData` field in the `Sync_History` object.

**Define the maximum number of users who can perform the initial sync or first sync of the day simultaneously**

Use the `Sync_Concurrent_Users_Limit` field in the `Sync_Config` object.

**Define the buffer time that system should include when calculating CPU time limit to protect the system from Apex CPU time limit exceptions during sync processes**

Use the `CPU_Time_Calculation_Buffer` field in the `Sync_Config` object.

## Visual Studio Code Based Modeler

Customize contracts accurately with dynamically proposed XML attributes and add validation methods quickly using Modeler CLI command.

IN THIS SECTION:

[Simplify Contract Customization with Keyword Suggestions](#)

Use the auto-completion capability in your VS Code based Modeler to create or customize a well-formed and accurate `actionType` keyword in the processflow contract and the `pagePattern` and `bindingMode` keywords in the UI contract.

### [Add Validation Methods in A Few Quick Steps](#)

Avoid the manual creation of validation functions during customization. The `sf modeler workspace add` CLI command now supports the creation of the validation method type of business logic contract.

### [Deep Link Additional Apps in Your Consumer Goods Cloud Offline Mobile App](#)

Your sales reps can collaborate, manage data efficiently, and streamline their field operations by using these third-party apps - Facebook, Workplace from Meta, GoSpotCheck, Star PassPRNT, and MicroStrategy Library.

## Simplify Contract Customization with Keyword Suggestions

Use the auto-completion capability in your VS Code based Modeler to create or customize a well-formed and accurate `actionType` keyword in the processflow contract and the `pagePattern` and `bindingMode` keywords in the UI contract.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions where Consumer Goods Cloud is enabled.

**How:** Upgrade your Modeler Plugin to Summer'24 and install the XML Language Support extension by Red Hat in your VS Code based Modeler.

SEE ALSO:

[Salesforce Help: Configure Keyword Suggestions in Contracts \(can be outdated or unavailable during release preview\)](#)

## Add Validation Methods in A Few Quick Steps

Avoid the manual creation of validation functions during customization. The `sf modeler workspace add` CLI command now supports the creation of the validation method type of business logic contract.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions where Consumer Goods Cloud is enabled.

**How:** Run the `sf modeler workspace add` CLI command in your workspace and follow the instructions provided to add a validation method to new or existing modules in your Modeler workspace.

```
? Select the resource you want to add. businesslogic
? Specify a name for the businesslogic: <businesslogic_name>
? Select the module to which businesslogic businesslogic_name should be added.
<module_name>
? Select a suitable option for businesslogic 'businesslogic_name'. validation method
? Select the reference object to which you want to add the validation method.
<modeler_object>
? Do you really want to create the businesslogic 'businesslogic_name'? Yes
```

## Deep Link Additional Apps in Your Consumer Goods Cloud Offline Mobile App

Your sales reps can collaborate, manage data efficiently, and streamline their field operations by using these third-party apps - Facebook, Workplace from Meta, GoSpotCheck, Star PassPRNT, and MicroStrategy Library.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions where Consumer Goods Cloud is enabled.

**How:** To integrate these third-party apps to your CG Cloud offline mobile app, link the apps to the Quick Access card of your offline mobile app.

SEE ALSO:

[Salesforce Help: Allowlisted Third-Party Apps \(can be outdated or unavailable during release preview\)](#)

## Trade Promotion Management

Achieve precise rounding and retain the adjustments that you make for a KPI for a period with the Rounding within Period rounding type. You can now execute Push Promotions faster, and easily extract claim data and download promotion data in shareable CSV formats.

### IN THIS SECTION:

#### [Retain Manually Entered KPI Values for Periods](#)

With the new Rounding within Period rounding type, retain the KPI values manually entered for a period. This rounding type adjusts the KPI values only within the period where the value is manually entered, and you don't lose the changes that you made in the previous period.

#### [Download Promotion Data Easily](#)

Key account managers can download data from the promotion P&L grid to a CSV file, and easily share the data with other stakeholders or use in third-party systems. To ensure that they download only the required data, they can filter the promotion P&L grid data before starting to download.

#### [Share Claim Data With Third-Party Systems](#)

Use the Payment API to extract KPI values, such as Payout Amount, for each product and product level for every claim tactic that you want to use in third-party systems. You can extract up to 60 KPIs per claim.

#### [Execute Push Promotions Faster](#)

Configure system settings to change how batch processes are orchestrated. As a result, the Push Promotions process completed faster.

#### [Improve Promotion Effectiveness with Analytics Dashboards](#)

Analyze account participation during promotional periods by using the new analytics dashboards for Trade Promotion Management. Use the data on sales volume, value, and product placement compliance to assess the impact of promotions. Gain insights into your brand and product performance. Compare the insights with competitor categories, brands, or products to measure and monitor the effectiveness of your products.

#### [Preview Your Processing Service](#)

Verify that a new version of the processing service is working seamlessly with the existing managed package. Test the new processing service version in your Sandbox early on to ensure that you don't face any hiccups when your production org uses the latest processing service. The new processing service version is automatically available in Sandbox and Production org when the new version of Salesforce core is available per the release timelines.

## Retain Manually Entered KPI Values for Periods

With the new Rounding within Period rounding type, retain the KPI values manually entered for a period. This rounding type adjusts the KPI values only within the period where the value is manually entered, and you don't lose the changes that you made in the previous period.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions where Consumer Goods Cloud Trade Promotion Management is enabled.

**How:** For an editable or editable calculated KPI whose value you want to adjust within a period, select **Rounding within Period** as the rounding type and **Sub Periods Then Periods** as the rounding order for the KPI definition. You can select this rounding type if **View and Edit for Months and Quarters** is enabled for the sales organization.

### SEE ALSO:

[Salesforce Help: Understand How KPI Values are Calculated when Rounding within Period is Enabled \(can be outdated or unavailable during release preview\)](#)

## Download Promotion Data Easily

Key account managers can download data from the promotion P&L grid to a CSV file, and easily share the data with other stakeholders or use in third-party systems. To ensure that they download only the required data, they can filter the promotion P&L grid data before starting to download.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions where Consumer Goods Cloud Trade Promotion Management is enabled.

**How:** To enable the Download button in the promotion P&L grid, edit the page and select **PL - Enable Download Button** in the PL Grid component.

SEE ALSO:

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

## Share Claim Data With Third-Party Systems

Use the Payment API to extract KPI values, such as Payout Amount, for each product and product level for every claim tactic that you want to use in third-party systems. You can extract up to 60 KPIs per claim.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions where Consumer Goods Cloud Trade Promotion Management is enabled.

## Execute Push Promotions Faster

Configure system settings to change how batch processes are orchestrated. As a result, the Push Promotions process completed faster.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions where Consumer Goods Cloud Trade Promotion Management is enabled.

**How:** Go to Custom Settings in Setup and add a system setting with Orchestrator as the value.

## Improve Promotion Effectiveness with Analytics Dashboards

Analyze account participation during promotional periods by using the new analytics dashboards for Trade Promotion Management. Use the data on sales volume, value, and product placement compliance to assess the impact of promotions. Gain insights into your brand and product performance. Compare the insights with competitor categories, brands, or products to measure and monitor the effectiveness of your products.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions where Consumer Goods Cloud Trade Promotion Management and Consumer Goods intelligence or CRMA for Consumer Goods are enabled.

**Who:** The dashboard is a part of the Trade Promotion Effectiveness app and is available only to Consumer Goods Cloud Trade Promotion Management users with the Consumer Goods Cloud Intelligence or the CRMA for CG add-on license.

**How:** From Setup, find and select **Consumer Goods Cloud**. Under Consumer Goods Cloud, go to the TPE Dashboard Configuration section. Follow the instructions in the setup flow.

## Preview Your Processing Service

Verify that a new version of the processing service is working seamlessly with the existing managed package. Test the new processing service version in your Sandbox early on to ensure that you don't face any hiccups when your production org uses the latest processing service. The new processing service version is automatically available in Sandbox and Production org when the new version of Salesforce core is available per the release timelines.



**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions where Consumer Goods Cloud Trade Promotion Management is enabled.

## Manage Permission Sets Efficiently

Assign the new permission sets, such as TPM Funds Calculation Worker and CGCloud Retail Supervisor User, to users, and save yourself the hassle of managing permission sets every time you upgrade to the latest version of the Consumer Goods managed package. The new permission sets are now shipped with the managed package and are automatically updated whenever the managed package is upgraded.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions where Consumer Goods Cloud is enabled.

**How:** If you're using Retail Execution, when you install the Consumer Goods managed package, use new profiles, and then based on user roles, assign the new permission sets. If you're using Trade Promotion Management, use a new batch user profile along with the ones that you already have. Then, based on the role of the batch user, assign the new batch user permission sets and delete the older permission sets.

SEE ALSO:

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

## Other Changes in Consumer Goods Cloud

Learn about the other changes for Consumer Goods Cloud in Summer '24.

**Where:** These changes apply to Lightning Experience in Enterprise and Unlimited editions where either Consumer Goods Cloud or Consumer Goods Cloud Trade Promotion Management is enabled.

**Why:** Consumer Goods users can use these new enhancements.

- For improved simple pricing, use the Use Built In Pricing field in the Order Template to compute the order value. If you don't enable the Use Built In Pricing field, the order items value and order total remain 0 for new orders and unchanged for existing orders. This change is applicable only to Retail Execution users.
- For promotions, the promotion templates now appear in ascending order of their sort value. To avoid errors when you create a promotion, provide user profiles with Public Read or Write access for the Sort field in the Promotion Template object. This change is applicable to both Retail Execution and Trade Promotion Management users.

SEE ALSO:

[Sharing Rules \(can be outdated or unavailable during release preview\)](#)

[Order Calculation \(can be outdated or unavailable during release preview\)](#)

## Energy and Utilities Cloud

Energy & Utilities (E&U) cloud combines and extends the full power of Salesforce Sales and Service clouds 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](#).

# Asset Service Lifecycle Management

Asset Service Lifecycle Management empowers businesses to build customer-centric field service operations, maximize asset lifetime value, and elevate the experience of service teams. Use Asset Service Lifecycle Management to accelerate service delivery, proactively manage assets, and simplify the work order management process. Manage the repair, recall, and upgrade of assets at scale by using Product Service Campaign. Estimate field service work before you create work orders by using Work Order Estimation.

## IN THIS SECTION:

### [Product Service Campaign](#)

Service faulty products, recall defective products, and manage communication initiatives at scale by using Product Service Campaign. Service managers can design and manage effective campaigns, cultivate customer trust, maintain company reputation, and uphold customer safety. They can easily segment and curate lists of impacted assets and vehicles. Service agents can use these lists to reach out to customers and track the services to be performed on assets and vehicles.

### [Work Order Estimation](#)

Service agents and other users can give customers accurate quotes for field service tasks prior to the creation of work orders. Boost user efficiency and customer satisfaction with a user-friendly guided flow that considers asset details, warranties, and service contract entitlements.

### [Asset Coverage View](#)

Discover how you can manage entitled services more efficiently with the Asset Coverage View.

## Product Service Campaign

Service faulty products, recall defective products, and manage communication initiatives at scale by using Product Service Campaign. Service managers can design and manage effective campaigns, cultivate customer trust, maintain company reputation, and uphold customer safety. They can easily segment and curate lists of impacted assets and vehicles. Service agents can use these lists to reach out to customers and track the services to be performed on assets and vehicles.

## IN THIS SECTION:

### [Manage Mass Asset Recalls, Modifications, and Upgrades Easily](#)

Create effective product service campaigns to monitor and address issues on large numbers of products or services. Specify the impacted product, and the priority, duration, status, and type of a campaign. Track each asset or vehicle that is the focus of a product service campaign. Create work orders and return orders to capture the services to be performed on impacted products.

### [Segment Assets in Product Service Campaigns Swiftly](#)

It's tedious to identify faulty assets and vehicles, and individually add them to product service campaigns. Service managers can identify and segment a large number of assets and vehicles for product service campaigns easily using actionable lists. With a single click, they can add items from actionable lists to product service campaigns. They can set list priorities, sort list orders, customize details, and assign lists to service agents for engagement initiatives and service activities.

## SEE ALSO:

### [Product Service Campaign](#)

## Manage Mass Asset Recalls, Modifications, and Upgrades Easily

Create effective product service campaigns to monitor and address issues on large numbers of products or services. Specify the impacted product, and the priority, duration, status, and type of a campaign. Track each asset or vehicle that is the focus of a product service campaign. Create work orders and return orders to capture the services to be performed on impacted products.

**Where:** This change applies to Lightning Experience in Automotive Cloud, Communications Cloud, Energy and Utilities Cloud, and Manufacturing Cloud, where Asset Service Lifecycle Management is enabled. The user interface of this product is available in English only and may not be fully supported in other languages.

**Who:** Users must have the Product Service Campaign permission set.

**How:** Create a Product Service Campaign record, and specify its details.

Then, create a Product Service Campaign Item record, and specify its details.

Create a Return Order or a Work Order record from the related list of a product service campaign record.

## Segment Assets in Product Service Campaigns Swiftly

It's tedious to identify faulty assets and vehicles, and individually add them to product service campaigns. Service managers can identify and segment a large number of assets and vehicles for product service campaigns easily using actionable lists. With a single click, they can add items from actionable lists to product service campaigns. They can set list priorities, sort list orders, customize details, and assign lists to service agents for engagement initiatives and service activities.

**Where:** This change applies to Lightning Experience in Automotive Cloud, Communications Cloud, Energy and Utilities Cloud, and Manufacturing Cloud, where Asset Service Lifecycle Management is enabled. The user interface of this product is available in English only and may not be fully supported in other languages.

**Who:** This feature is available to users with the Actionable Segmentation, Query for Data Pipelines, and Product Service Campaign permission sets.

**How:** On a Product Service Campaign record page, click **Create Actionable List**. Create an actionable list and click **Add to Service Campaign**.

## Work Order Estimation

Service agents and other users can give customers accurate quotes for field service tasks prior to the creation of work orders. Boost user efficiency and customer satisfaction with a user-friendly guided flow that considers asset details, warranties, and service contract entitlements.

### IN THIS SECTION:

#### [Estimate Field Service Work Before You Create Work Orders](#)

Improve customer satisfaction by enabling your users to provide your customers with a quote and an estimate of the work to be done associated with a specific asset. Users can generate quotes for assets based on work types and necessary products. They can also apply discounts from associated coverages.

### SEE ALSO:

#### [Estimate Field Service Work and Quote Costs to Customers Easily](#)

## Estimate Field Service Work Before You Create Work Orders

Improve customer satisfaction by enabling your users to provide your customers with a quote and an estimate of the work to be done associated with a specific asset. Users can generate quotes for assets based on work types and necessary products. They can also apply discounts from associated coverages.

**Where:** This change applies to Lightning Experience in Automotive Cloud, Communications Cloud, Energy and Utilities Cloud, and Manufacturing Cloud, where Asset Service Lifecycle Management is enabled. The user interface of this product is available in English only and may not be fully supported in other languages.

**Who:** This feature is available to users with the Work Order Estimation permission set.

**How:** You can launch the work order estimation process from an account, an asset, or an existing work order. Define the work to be done on the quote by providing the details, review the quote summary, and then generate a proposal. After the customer approves the quote, work orders are generated.

## Asset Coverage View

Discover how you can manage entitled services more efficiently with the Asset Coverage View.

### IN THIS SECTION:

#### [Provision Entitlements with Precision](#)

Eliminate discrepancies and minimize costly errors when managing entitlements for contracts, warranties, and maintenance plans. The Entitlements view provides agents with an overview of a customer's entitled services, making it easier to identify what was consumed versus what was promised. Previously, entitlement information was available only in related lists, which made it difficult to discern what was available to the customer.

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

**How:** From the Lightning App Builder, drag the Warranties View and Contracts View components to the asset record page, and activate the changes. Next, in Object Manager, drag the Show Coverage (desktop) and Select Coverage (mobile) to the Work Order page layout, and repeat for the Case page layout. Agents and technicians can choose the appropriate coverage on desktop and mobile.

### SEE ALSO:

[Salesforce Help: Manage Entitlements in Field Service \(can be outdated or unavailable during release preview\)](#)

## Financial Services Cloud

Learn about the new features and enhancements in Financial Services Cloud that strengthen client management, automate tasks, provide deeper customer insights, and simplify data organization.

## IN THIS SECTION:

[Digital Lending](#)

Digital Lending supports the end-to-end lending lifecycle across all retail loan products and channels in a unified lending platform. Create a loan application process that suits the needs of your clients, both self-service application intake and assisted application intake. Digital Lending harnesses the power of Financial Services Cloud and common Industry features to offer a platform that serves as both the point-of-sale and loan origination system.

[Digital Lending—India](#)

Support banks and financial institutions in India with an end-to-end loan origination solution. Get started quickly with the loan origination process by using assisted onboarding, guided application intake, prebuilt integration templates for key verifications and screenings, and workflows that can be easily orchestrated using Stage Management. Unify the loan origination process on a single platform, expedite decision making, and increase efficiency and transparency across the loan origination lifecycle.

[Transaction Dispute Management](#)

Streamline the dispute resolution process by integrating Transaction Dispute Management with Mastercom®. Eliminate the inefficiencies that arise from switching between systems, ensure regulatory compliance, and reduce operational costs to enhance customer and employee experience.

[Business Client Engagement](#)

Your users can use Business Client Engagement to anticipate and fulfill the needs of their clients. Drive efficiency and compliance by streamlining complex onboarding tasks and business processes. Your users can focus on building strategic relationships by having a detailed view of the business client ownership structure.

[Rollup Definitions for Record Rollups](#)

Use the Record Rollup Definitions feature to streamline the aggregation of records from various objects or groups and to provide a consolidated view of your data.

[Integration Orchestration \(Generally Available\)](#)

Review the status of the integration callouts by using Integration Orchestration. Additionally, add the Integration Execution Status lightning web component to your record page to manage the integration callouts.

[Group Membership and Households](#)

Use the Party Relationship Group data model to create groups or households easily and quickly. Organize your customers in convenient ways by using Groups or Households. Gain insights into a customer's financial circles, such as a household with its family members and professional connections.

[Household API Setup](#)

Aggregate records and associate them with the record of an unrelated object to consolidate information and make it easy for users to access the information from both objects.

[Data Cloud for Financial Services Cloud](#)

Updates to Calculated Insights in Data Cloud and FlexCards in Salesforce to view more customer insights.

[Capture Income and Expenses](#)

View the cash inflow and outflow of your clients, identify spending trends, and prepare for upcoming client meetings.

[Financial Account Management Standard Objects](#)

Use Financial Account and related objects without installing the Financial Services Cloud managed package. Give your users greater control and flexibility over their data models, enabling seamless integration and decreased dependencies by using these standard objects. Enable the Financial Account Management Standard Objects setting and start using the Financial Account and related standard objects, which help you model financial accounts and related information for your users.

[Get Started Faster with Guided Setups](#)

Discover the new guided setups for Financial Services Cloud.

[Watch Financial Services Cloud Videos](#)

New videos help your users with comprehensive guidance on the KYC data model and integrated onboarding in Financial Services Cloud.

[New and Changed Financial Services Cloud Object Fields](#)

Do more with the new and updated Financial Services Cloud objects.

[New Connect REST API Resources](#)

Get to know the resources available with Financial Services Cloud.

## 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.

- [Stage Management](#)

With Stage Management, simplify complex business processes such as customer onboarding and transaction disputes with greater visibility and control.

- [Actionable List Members](#)

List creators can now focus on important data by adding or removing columns in Actionable List Members. Use the default Record Status filter to view only the active actionable list member records. To help list creators access list-specific OmniScripts on the Bulk Action Panel, associate OmniScripts with bulk action configuration. List creators can now create action plans in bulk for list members.

## Digital Lending

Digital Lending supports the end-to-end lending lifecycle across all retail loan products and channels in a unified lending platform. Create a loan application process that suits the needs of your clients, both self-service application intake and assisted application intake. Digital Lending harnesses the power of Financial Services Cloud and common Industry features to offer a platform that serves as both the point-of-sale and loan origination system.

Use a new data model that supports the loan process across all consumer loan products. Provide lenders and clients with an easy-to-navigate loan application experience by using scalable integrations and native capabilities for product catalog, eligibility, and pricing. Use Product Catalog Management to create an entire loan product catalog composed of products, attributes, product classifications, simple and bundled products, and rules. Use an intuitive user interface built using OmniStudio components to customize the client and banker experience to meet your needs. Build a custom UI by using a Connect API that enables headless POST and GET operations for core application data model objects. Dynamically determine the disclosures to show a loan applicant based on flexible input attributes, such as loan product and intake channel, by using Business Rules Engine.

### IN THIS SECTION:

- [Give Clients a Self-Serve Loan Application Process](#)

Your clients can apply for a loan during a time that's convenient for them by using Digital Lending self-service application intake. An easy-to-configure Experience Cloud template supports the self-service application intake experience to meet the needs of your clients. To determine the categories and products that an applicant sees based on their Account context, and determine applicant loan eligibility, create product qualification rules. To show categories, products, and product attributes in Experience Cloud, use quote and order capture. The minimal interaction with bankers at your financial institution and the simple steps help applicants complete a loan application quickly and easily.

### [Help Clients Apply for a Loan](#)

Digital Lending assisted application intake experience provides your bankers with a seamless loan application process. Show a banker the loan products that the applicant is eligible for by creating loan products, catalogs, attributes, classifications, and rules by using Product Catalog Management. Guide bankers through the loan application process, show contextual information, and provide access to relevant tasks by using OmniStudio components.

### [Approve or Reject a Loan Application by Using Underwriter Console](#)

Give underwriters easy access to loan application details to make informed decisions by using Underwriter Console. The underwriters can get a consolidated view of a submitted loan application on the application form product record page. They can view and edit assets, liabilities, and collateral details, assign action items, confirm pricing, verify integration results, such as Know Your Customer and credit checks, and approve or reject an application.

### [New and Changed Invocable Actions](#)

Get to know the invocable actions available with Financial Services Cloud.

### [New Apex Namespace in Digital Lending](#)

The new `industriesDigitalLending` namespace has these new classes.

### [New Metadata Types in Digital Lending](#)

Learn more about the new metadata types in Digital Lending.

#### SEE ALSO:

[Salesforce Help: Set Up and Manage Digital Lending](#)

## Give Clients a Self-Serve Loan Application Process

Your clients can apply for a loan during a time that's convenient for them by using Digital Lending self-service application intake. An easy-to-configure Experience Cloud template supports the self-service application intake experience to meet the needs of your clients. To determine the categories and products that an applicant sees based on their Account context, and determine applicant loan eligibility, create product qualification rules. To show categories, products, and product attributes in Experience Cloud, use quote and order capture. The minimal interaction with bankers at your financial institution and the simple steps help applicants complete a loan application quickly and easily.

**Where:** This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

**When:** Digital Lending is available starting July 16, 2024.

**Who:** To use this feature, users need the Financial Services Cloud Extension and Financial Services Cloud Digital Lending permission sets.

**Why:** Loan applicants who seek an application process that's similar to self-checkout at a grocery store can now complete an application online without communicating with anyone at your financial institution. The self-service application intake experience reduces the stress of applying for a loan and helps them pause and resume their application at their convenience. In the post-intake experience, an applicant can review and complete the action items assigned to them to complete the application process.

**How:** Digital Lending uses Financial Services Cloud and common Industry features. In Setup, turn on Digital Lending. Then use Product Catalog Management, Qualification Rules, Business Rules Engine, OmniStudio, Salesforce Contracts, and Experience Cloud to set up and deploy the self-service application intake experience to your clients.

## Help Clients Apply for a Loan

Digital Lending assisted application intake experience provides your bankers with a seamless loan application process. Show a banker the loan products that the applicant is eligible for by creating loan products, catalogs, attributes, classifications, and rules by using Product Catalog Management. Guide bankers through the loan application process, show contextual information, and provide access to relevant tasks by using OmniStudio components.

**Where:** This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

**When:** Digital Lending is available starting July 16, 2024.

**Who:** To use this feature, users need the Financial Services Cloud Extension and Financial Services Cloud Digital Lending permission sets.

**Why:** First-time loan applicants can be overwhelmed by the application and appreciate guidance from a banker to complete the process. For example, a first-time homeowner needs a loan to complete the structural modifications identified in a home inspection. They require the expertise of a banker to guide them to enter their applicant details, upload supporting documentation, and provide feedback on the monthly payment, term, and rate options. The banker ensures that the application is completed correctly so that the loan is approved quickly.

**How:** Digital Lending uses Financial Services Cloud and common Industry features. In Setup, turn on Digital Lending. Then use Product Catalog Management, Qualification Rules, Business Rules Engine, OmniStudio, Salesforce Contracts, and Experience Cloud to set up and deploy the assisted application intake experience to your clients.

## Approve or Reject a Loan Application by Using Underwriter Console

Give underwriters easy access to loan application details to make informed decisions by using Underwriter Console. The underwriters can get a consolidated view of a submitted loan application on the application form product record page. They can view and edit assets, liabilities, and collateral details, assign action items, confirm pricing, verify integration results, such as Know Your Customer and credit checks, and approve or reject an application.

**Where:** This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

**When:** Digital Lending is available starting July 16, 2024.

**Who:** To use this feature, users need the Financial Services Cloud Extension, Financial Services Cloud Digital Lending, and Digital Lending Workbench permission sets.

**Why:** Underwriter Console gives an underwriter a streamlined view of the loan application details without switching between tools. It's time-consuming for an underwriter to use different tools to analyze an applicant's credit history, verify income, submit supporting documentation, and gather personal data to determine if they qualify. Underwriter Console shows all these details in a single view, helping the underwriter save time and approve applications faster.

**How:** Set up Digital Lending self-service application intake and assisted application intake experience. Then, assign users the Digital Lending Workbench permission to give them access to digital lending underwriter console features.

## New and Changed Invocable Actions

Get to know the invocable actions available with Financial Services Cloud.

### Check in a contract document version

Use the new `checkInContractDocumentVersion` action.

### Create a contract for a specified record

Use the new `createCImContract` action.



**Perform actions on a contract based on its status**

Use the new `performContractAction` action.

**Send a contract to specified recipients for e-signature**

Use the new `sendContractForESignature` action.

**Specify the JSON data of the context data record**

Use the new `contextData` field on the existing `createIntegrationPlan` action.

**Define context definition name that's used to build the context data record**

Use the new `contextDefinitionName` field on the existing `createIntegrationPlan` action.

**Define context mapping name that's used to build the context data record**

Use the new `contextMappingName` field on the existing `createIntegrationPlan` action.

**Indicate whether the key in the data is a tagged key (true) or not (false)**

Use the new `isTaggedData` field on the existing `createIntegrationPlan` action.

## New Apex Namespace in Digital Lending

The new `industriesDigitalLending` namespace has these new classes.

### New Classes

**In the Digital Lending application intake process, invoke utility methods from OmniScripts**

Use the `DigitalLendingIntakeRecordsWrapper` class.

**In the Digital Lending post intake within FlexCards, invoke utility methods from integration procedures**

- Use the `DigitalLendingUtils` class.
- Use the `DigitalLendingPostIntakeRecordsWrapper` class.

**In the Digital Lending FlexCards, invoke utility methods from integration procedures**

- Use the `DigitalLendingProductsApi` class.
- Use the `PricingExecutionWrapper` class.

## New Metadata Types in Digital Lending

Learn more about the new metadata types in Digital Lending.

### Salesforce Flow

**Create contract document**

Use the new `createCfmContract` value in the existing `actionType` field, which is on the `FlowActionCall` subtype of the `Flow` metadata type.

**Check in contract document version**

Use the new `checkInContractDocumentVersion` value in the existing `actionType` field, which is on the `FlowActionCall` subtype of the `Flow` metadata type.

**Perform actions on a contract based on its status**

Use the new `performContractAction` value in the existing `actionType` field, which is on the `FlowActionCall` subtype of the `Flow` metadata type.

### Send contracts for e-signature

Use the new `sendContractForESignature` value in the existing `actionType` field, which is on the `FlowActionCall` subtype of the `Flow` metadata type.

## Digital Lending—India

Support banks and financial institutions in India with an end-to-end loan origination solution. Get started quickly with the loan origination process by using assisted onboarding, guided application intake, prebuilt integration templates for key verifications and screenings, and workflows that can be easily orchestrated using Stage Management. Unify the loan origination process on a single platform, expedite decision making, and increase efficiency and transparency across the loan origination lifecycle.

### IN THIS SECTION:

#### [Get Digital Lending—India Up and Running with Ease](#)

Streamline the end-to-end loan origination process with a guided setup. Follow simple, clear steps to set up Digital Lending—India. The guided setup walks you through the prerequisites for enabling the Digital Lending—India sample app and the prebuilt integration processing templates required for connecting with external service providers. Use the guided setup to configure the workflows for application verification, applicant's profile risk analysis, applicant eligibility evaluation, and pre-disbursement operations. View information about the artifacts that you need throughout the loan origination lifecycle. You can also set up the application form, applicant, and party profile stages and their transition rules by using the guided setup.

#### [Increase Speed and Ease of Adoption with Digital Lending—India Sample App](#)

Offer your users and customers a superior loan origination experience by providing them with a comprehensive view of all the resources and capabilities required in a loan origination lifecycle. With the sample app, your users can quickly access important information related to loan applications with only a few clicks. By providing consolidated information, eliminate the inefficiencies that arise from switching between systems, and reduce the turnaround time in each phase of the loan origination process. You can also customize the Digital Lending—India home page with lightning web components to meet your specific loan origination needs.

#### [Onboard Loan Applicants Faster with Guided Application Intake](#)

Eliminate the inefficiencies with the tedious loan origination process by offering your agents or relationship managers a guided application intake experience. With guided application intake, reduce the need for applicants to visit banks for physical verification or for providing documents. Agents can complete the loan application forms with more accuracy and minimal manual effort. Your loan officers or mid-office agents can efficiently verify applicant and application details, and collect additional details to ensure underwriters have the required information to decide application eligibility.

#### [Offer a Smooth Loan Application Review Experience](#)

Make loan decisioning easier for your underwriters by offering them a comprehensive view of the applicant, application, and application form product details. Give your underwriters access to information about the documents collected and integrations run at various stages of the loan application process. Additionally, empower underwriters to create, track, and review any deviations before they accept a loan application. With this consolidated information and capabilities, underwriters can accurately and efficiently determine if applicants qualify for a loan.

#### [Reduce the Turnaround Time for a Loan Disbursal](#)

When a loan is sanctioned, give your operations officers access to a guided OmniScript to easily collect details about bank accounts and repayment methods. By capturing the repayment schedule details, efficiently manage a loan throughout its lifecycle after it's disbursed, and ensure that the applicants repay loans according to the agreed-upon repayment terms.

### SEE ALSO:

[Set Up and Manage Digital Lending—India](#)

## Get Digital Lending—India Up and Running with Ease

Streamline the end-to-end loan origination process with a guided setup. Follow simple, clear steps to set up Digital Lending—India. The guided setup walks you through the prerequisites for enabling the Digital Lending—India sample app and the prebuilt integration processing templates required for connecting with external service providers. Use the guided setup to configure the workflows for application verification, applicant's profile risk analysis, applicant eligibility evaluation, and pre-disbursement operations. View information about the artifacts that you need throughout the loan origination lifecycle. You can also set up the application form, applicant, and party profile stages and their transition rules by using the guided setup.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions where Digital Lending—India is enabled.

**When:** Digital Lending—India is available starting on July 16, 2024.

**Who:** To use this feature, your users need the Digital Lending India Admin User permission.

**How:** From Setup, find and select **Lending**, and then under Guided Setup, select **Digital Lending—India**.

SEE ALSO:

[Set Up and Manage Digital Lending—India](#)

## Increase Speed and Ease of Adoption with Digital Lending—India Sample App

Offer your users and customers a superior loan origination experience by providing them with a comprehensive view of all the resources and capabilities required in a loan origination lifecycle. With the sample app, your users can quickly access important information related to loan applications with only a few clicks. By providing consolidated information, eliminate the inefficiencies that arise from switching between systems, and reduce the turnaround time in each phase of the loan origination process. You can also customize the Digital Lending—India home page with lightning web components to meet your specific loan origination needs.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions where Digital Lending—India is enabled.

**When:** Digital Lending—India is available starting on July 16, 2024.

**Who:** To use this feature, your users need the Digital Lending India Admin User permission.

**How:** From Setup, find and select **Digital Lending—India**, and then turn on Digital Lending—India. From the App Launcher, find and select **Digital Lending—India**.

SEE ALSO:

[Set Up and Manage Digital Lending—India](#)

## Onboard Loan Applicants Faster with Guided Application Intake

Eliminate the inefficiencies with the tedious loan origination process by offering your agents or relationship managers a guided application intake experience. With guided application intake, reduce the need for applicants to visit banks for physical verification or for providing documents. Agents can complete the loan application forms with more accuracy and minimal manual effort. Your loan officers or mid-office agents can efficiently verify applicant and application details, and collect additional details to ensure underwriters have the required information to decide application eligibility.

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Make loan decisioning easier for your underwriters by offering them a comprehensive view of the applicant, application, and application form product details. Give your underwriters access to information about the documents collected and integrations run at various stages of the loan application process. Additionally, empower underwriters to create, track, and review any deviations before they accept a loan application. With this consolidated information and capabilities, underwriters can accurately and efficiently determine if applicants qualify for a loan.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions where Digital Lending—India is enabled.

**When:** Digital Lending—India is available starting on July 16, 2024.

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## Reduce the Turnaround Time for a Loan Disbursal

When a loan is sanctioned, give your operations officers access to a guided OmniScript to easily collect details about bank accounts and repayment methods. By capturing the repayment schedule details, efficiently manage a loan throughout its lifecycle after it's disbursed, and ensure that the applicants repay loans according to the agreed-upon repayment terms.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions where Digital Lending—India is enabled.

**When:** Digital Lending—India is available starting on July 16, 2024.

SEE ALSO:

[Set Up and Manage Digital Lending—India](#)

## Transaction Dispute Management

Streamline the dispute resolution process by integrating Transaction Dispute Management with Mastercom®. Eliminate the inefficiencies that arise from switching between systems, ensure regulatory compliance, and reduce operational costs to enhance customer and employee experience.

IN THIS SECTION:

[Resolve Transaction Disputes Faster with Prebuilt Mastercom® Integration](#)

Transaction Dispute Management now integrates with Mastercom® to assist you in resolving transaction disputes with an efficient chargeback process. Use this integration to protect your customers against fraudulent or unsatisfactory transactions. Dispute specialists can create chargebacks with a few clicks by using all the information captured in the dispute intake, without the need to reenter the same data in multiple systems.

## Resolve Transaction Disputes Faster with Prebuilt Mastercom® Integration

Transaction Dispute Management now integrates with Mastercom® to assist you in resolving transaction disputes with an efficient chargeback process. Use this integration to protect your customers against fraudulent or unsatisfactory transactions. Dispute specialists can create chargebacks with a few clicks by using all the information captured in the dispute intake, without the need to reenter the same data in multiple systems.

**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 OmniStudio Admin, OmniStudio User, and Financial Services Cloud Extension or FSC Service permission sets.

**Why:** In banking services, a robust dispute resolution process for card transactions is essential to protect your customers against unauthorized charges, unsatisfactory purchases, and errors. Fulfilling dispute requests, particularly when filing chargebacks, requires significant operational effort, and involves multiple systems and stakeholders. By integrating Transaction Dispute Management with Mastercom, streamline the chargeback initiation process to facilitate a reliable and transparent dispute resolution process. After a case is created for a transaction dispute request, use prebuilt flows and integration procedures to orchestrate the end-to-end chargeback process.

SEE ALSO:

[Chargeback for Transaction Disputes](#)

## Business Client Engagement

Your users can use Business Client Engagement to anticipate and fulfill the needs of their clients. Drive efficiency and compliance by streamlining complex onboarding tasks and business processes. Your users can focus on building strategic relationships by having a detailed view of the business client ownership structure.

IN THIS SECTION:

[Discover the Ultimate Owners of Your Business Clients](#)

Help your relationship managers connect dots easily by using the Onboarding and Know Your Customer data models. These models help businesses efficiently capture the details of beneficial owners, controlling parties, and business structure hierarchy. Ensure a clear and precise data-driven approach to identify the key stakeholders in various ownership structures.

[View Relationships of Your Business Clients](#)

Use the new prebuilt actionable relationship center (ARC) graph templates to visualize complex business relationships in a convenient and interactive manner. View how your business client entities are related to each other and to other related accounts by using a B2B Account to Account Relationship graph template and a B2B Applicant to Applicant Relationship graph template.

### Discover the Ultimate Owners of Your Business Clients

Help your relationship managers connect dots easily by using the Onboarding and Know Your Customer data models. These models help businesses efficiently capture the details of beneficial owners, controlling parties, and business structure hierarchy. Ensure a clear and precise data-driven approach to identify the key stakeholders in various ownership structures.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions where Financial Services Sales Cloud and Business Client Engagement are enabled.

**Why:** To go through your client's complex corporate landscape can be challenging, and it often leads to trust and integrity issues. The ultimate ownership information is critical in the process of onboarding clients, suppliers, and partners.

**How:** In Setup, search for and select **Business Client Engagement Settings**. Turn on Business Client Engagement.

SEE ALSO:

[Salesforce Help: Business Client Engagement](#)

[Salesforce Help: Setup of Business Client Engagement](#)

## View Relationships of Your Business Clients

Use the new prebuilt actionable relationship center (ARC) graph templates to visualize complex business relationships in a convenient and interactive manner. View how your business client entities are related to each other and to other related accounts by using a B2B Account to Account Relationship graph template and a B2B Applicant to Applicant Relationship graph template.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions where Financial Services Cloud and Business Client Engagement are enabled.

**Why:** When you clone and add a B2B Account to Account Relationship graph to the account details page, you can see all subsidiaries, the legal and beneficial owners and the controlling parties associated with these subsidiaries. When you clone and add B2B Applicant to Applicant Relationship graph to an application form details page, you can visualize the related applicants that are associated with the applicant and their relationships with them. These related applicants can be individuals or business accounts.

**How:** Create an ARC graph by using either the B2B Account to Account Relationship or B2B Applicant to Applicant Relationship template. Add the graph to an Account page or an Application Form page in the Lightning App Builder.

SEE ALSO:

[Salesforce Help: Set Up ARC Permissions in Financial Services Cloud](#)

[Salesforce Help: Create Actionable Relationship Center Graphs by Using Default Templates for Business Client Engagement](#)

## Rollup Definitions for Record Rollups

Use the Record Rollup Definitions feature to streamline the aggregation of records from various objects or groups and to provide a consolidated view of your data.

IN THIS SECTION:

[Create Record Rollup Definitions More Easily](#)

The Record Rollup Definitions feature is available without installing the Financial Services Cloud managed package. By using an easy-to-use and intuitive UI, you can create record rollup definitions with just a few clicks.

### Create Record Rollup Definitions More Easily

The Record Rollup Definitions feature is available without installing the Financial Services Cloud managed package. By using an easy-to-use and intuitive UI, you can create record rollup definitions with just a few clicks.

**Where:** This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

**Who:** To set up record rollup definitions, users need the Financial Services Cloud Extension or FSC Sales, Data Pipelines Base User, and OmniStudio Admin permissions sets.

**Why:** The new Record Rollup Definitions feature expands the record aggregation capability, enabling the aggregation of records from one object to another object. For example, you can roll up financial accounts to the Party relationship Group so that your users can view all the financial accounts associated with household members at the household level.

SEE ALSO:

[Salesforce Help: Rollup Definitions for Record Rollups](#)

## Integration Orchestration (Generally Available)

Review the status of the integration callouts by using Integration Orchestration. Additionally, add the Integration Execution Status lightning web component to your record page to manage the integration callouts.

### IN THIS SECTION:

#### [Streamline Integration Callouts with Integration Orchestration](#)

Use Integration Orchestration, which is now generally available, to dynamically create integration callout plans, and enable users to review the status of integrations with different external endpoints. Users can easily track the progress of all integration callouts, resulting in better process visibility and efficiency.

#### [Visualize Integration Callouts and Manage Them Easily](#)

Integration Orchestration now has a prebuilt Lightning Web Component. Add this component to your record page to give users a consolidated view of all the integration callouts. Users can easily manage manual and automatically triggered integrations—all at one place.

### SEE ALSO:

[Salesforce Help: Integration Orchestration](#)

## Streamline Integration Callouts with Integration Orchestration

Use Integration Orchestration, which is now generally available, to dynamically create integration callout plans, and enable users to review the status of integrations with different external endpoints. Users can easily track the progress of all integration callouts, resulting in better process visibility and efficiency.

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Integration Orchestration now has a prebuilt Lightning Web Component. Add this component to your record page to give users a consolidated view of all the integration callouts. Users can easily manage manual and automatically triggered integrations—all at one place.

**Where:** This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

**How:** In the Lightning App Builder, add the Integration Execution Status component to the record page.

## Group Membership and Households

Use the Party Relationship Group data model to create groups or households easily and quickly. Organize your customers in convenient ways by using Groups or Households. Gain insights into a customer's financial circles, such as a household with its family members and professional connections.

### IN THIS SECTION:

#### [Use Party Relationship Groups to Create Groups Easily and Efficiently](#)

Streamline the creation of groups or households with Party Relationship Groups. Group family members of a household as members of a Party Relationship Group, and specify member roles and relationships easily and quickly. Add related contacts, groups, and business accounts, and specify relationships with the group and its members.

### [Visualize Groups or Households with Actionable Relationship Center](#)

Your financial advisors can deepen their understanding of a household by viewing the household and the related records on an actionable relationship center (ARC) graph. Use the default templates available for Account Relations and Contact Relations to get you started when you create ARC graphs. Use Account Contact Relationship, Account Account Relationship, and Contact Contact Relationship as junction objects in ARC to show many-to-many relationships between contacts and accounts.

SEE ALSO:

[Salesforce Help: Group Membership and Households](#)

## Use Party Relationship Groups to Create Groups Easily and Efficiently

Streamline the creation of groups or households with Party Relationship Groups. Group family members of a household as members of a Party Relationship Group, and specify member roles and relationships easily and quickly. Add related contacts, groups, and business accounts, and specify relationships with the group and its members.

**Where:** This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

**Who:** To create Party Relationship Groups, users need the Group Membership permission set.

**Why:** Streamline the group creation process by using the New Group UI flow associated with Party Relationship Group. Easily create a group of family members and professional connections and form a collective unit, such as a household. Use the New Group UI flow to create records for each group member, related contact, and business account that must be included in the group based on the details entered in the group. The flow simplifies the grouping of members and reduces data entry effort for group creators.

**How:** To create a group or household, go to the Party Relationship Group list view page, and then click **New Group**.

SEE ALSO:

[Salesforce Help: Group Membership and Households](#)

## Visualize Groups or Households with Actionable Relationship Center

Your financial advisors can deepen their understanding of a household by viewing the household and the related records on an actionable relationship center (ARC) graph. Use the default templates available for Account Relations and Contact Relations to get you started when you create ARC graphs. Use Account Contact Relationship, Account Account Relationship, and Contact Contact Relationship as junction objects in ARC to show many-to-many relationships between contacts and accounts.

**Where:** This change applies to Lightning Experience in Professional, Enterprise and Unlimited editions where Financial Services Cloud is enabled.

**Who:** To use ARC graphs, users need the Group Membership and ARC Access permission sets.

SEE ALSO:

[Salesforce Help: Group Membership and Households](#)

## Household API Setup

Aggregate records and associate them with the record of an unrelated object to consolidate information and make it easy for users to access the information from both objects.



## IN THIS SECTION:

[Aggregate and View Salesforce Records in your Financial Planning Tool by Using API](#)

Create a Household API Setup to use Connect API calls that retrieve household details and related records without the help of a Salesforce Developer. This enables the retrieval of household details, such as Members and their Financial Accounts, Financial Holdings, Assets and Liabilities, from within your financial planning tool.

## Aggregate and View Salesforce Records in your Financial Planning Tool by Using API

Create a Household API Setup to use Connect API calls that retrieve household details and related records without the help of a Salesforce Developer. This enables the retrieval of household details, such as Members and their Financial Accounts, Financial Holdings, Assets and Liabilities, from within your financial planning tool.

**Where:** This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

**When:** The Household API for Wealth Management unmanaged package is available starting June 8, 2024.

**Who:** To use this feature, users need the Financial Services Cloud Extension and Manage Rollup Definitions permission sets.

**Why:** The Household API for Wealth Management unmanaged package contains the household API Retrieval Summary Definition that retrieves household details by using the Household Members, Household Financial Accounts, Household Assets, and Household Liabilities record aggregation definitions and the fields for each object. When you create a Household API Setup and call the endpoint, it returns all the relevant information about the objects. Or use your own custom Record Rollup Definitions to streamline the aggregation of household records as they relate to other objects to provide a consolidated view of your client's household data.

**How:** Install the Household API for Wealth Management unmanaged package to use the preconfigured record aggregation definitions. Or, in Setup, create Rollup Definitions that meet your business requirements. Then, create a Household API in Setup that references the installed record aggregation definitions or your custom record rollup definitions.

## SEE ALSO:

[Aggregate Records Using API](#)

## Data Cloud for Financial Services Cloud

Updates to Calculated Insights in Data Cloud and FlexCards in Salesforce to view more customer insights.

## IN THIS SECTION:

[Visualize Insights into a Household and its Members](#)

Add the FSCDataCloudShowIncomeExpenses and FSCDataCloudCashFlowByCategory FlexCards to a household account record page. On the FlexCards, use two new picklists to filter by members and financial accounts. In the time frame picklist on the FSCDataCloudCashFlowByCategory FlexCard, select one month from the past 12 months to view cash flow category data in the pie chart.

[Calculate More Customer Insights](#)

Use the Goal Status Calculated Insight in Data Cloud to gain insights into the progress of a financial goal based on the current value, contributions, and target achievement date. View financial account data on the FSCDataCloudShowIncomeExpenses and FSCDataCloudCashFlowByCategory FlexCards and sort the FSCDataCloudCashFlowByCategory FlexCard by month.

## Visualize Insights into a Household and its Members

Add the FSCDataCloudShowIncomeExpenses and FSCDataCloudCashFlowByCategory FlexCards to a household account record page. On the FlexCards, use two new picklists to filter by members and financial accounts. In the time frame picklist on the FSCDataCloudCashFlowByCategory FlexCard, select one month from the past 12 months to view cash flow category data in the pie chart.

**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.

**Why:** To view the client financial income, surplus, and deficit data, hover over a bar on the FSCDataCloudShowIncomeExpenses FlexCard. Or, show income and expense data in a line graph to easily view and track smaller financial changes. For example, when you view a household, select one household member and one financial account to know how their income and expenses affect the overall financial health of the household.

**How:** To show members and financial accounts for a household, add the FSCDataCloudShowIncomeExpenses and FSCDataCloudCashFlowByCategory FlexCards to the household account record page.

SEE ALSO:

[Salesforce Help: View Visualized Insights in Salesforce](#)

## Calculate More Customer Insights

Use the Goal Status Calculated Insight in Data Cloud to gain insights into the progress of a financial goal based on the current value, contributions, and target achievement date. View financial account data on the FSCDataCloudShowIncomeExpenses and FSCDataCloudCashFlowByCategory FlexCards and sort the FSCDataCloudCashFlowByCategory FlexCard by month.

**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.

**Why:** View financial account data on the FSCDataCloudShowIncomeExpenses and FSCDataCloudCashFlowByCategory FlexCards by using CompletionFinancialAccountName and FinancialAccountID, the new fields added to these calculated insights: Deposits for 3 Months, Deposits for 6 Months, Deposits for 1 Year, Expenses for 3 Months, Expenses for 6 Months, and Expenses for 1 Year. Sort the FSCDataCloudCashFlowByCategory FlexCard by one month from the past 12 months by using Month and Year, the new fields added to the Monthly Deposit by Category and Monthly Expense by Category calculated insights.

**How:** To view the new calculated insights and fields, in Data Cloud, select **Data Explorer**, and then select **Calculated Insights**. In Salesforce, the FSCDataCloudCashFlowByCategory and FSCDataCloudShowIncomeExpenses FlexCards show data based on the new fields added to the calculated insights.

SEE ALSO:

[Salesforce Help: View Visualized Insights in Salesforce](#)

[Salesforce Help: Calculate Customer Insights Using Data Cloud](#)

## Capture Income and Expenses

View the cash inflow and outflow of your clients, identify spending trends, and prepare for upcoming client meetings.

### IN THIS SECTION:

#### [View Client Cash Flow Summary](#)

Get a snapshot of the ingoing and outgoing transactions of your clients by using the FSCCashFlow FlexCard. Visualize the cash flow trends in a month-by-month breakdown of the total income and expenses of your clients on a double bar or line graph. OmniStudio components retrieve expense and income details on the Party Income and Party Expense objects to show client financial data. View, add, and edit income and expenses in list views on the FlexCard. Select a time frame to filter data on a person account, household account, or party relationship group record page.

### View Client Cash Flow Summary

Get a snapshot of the ingoing and outgoing transactions of your clients by using the FSCCashFlow FlexCard. Visualize the cash flow trends in a month-by-month breakdown of the total income and expenses of your clients on a double bar or line graph. OmniStudio components retrieve expense and income details on the Party Income and Party Expense objects to show client financial data. View, add, and edit income and expenses in list views on the FlexCard. Select a time frame to filter data on a person account, household account, or party relationship group record page.

**Where:** This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

**Who:** To use this feature, users need the Financial Services Cloud Extension permission set, and the OmniStudio Admin or OmniStudio User permission set.

**Why:** Identify free cash flow to assist with savings goals and forecast income and expenditures. For example, 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.

**How:** If you're using person account and household in Financial Services Cloud Managed Package to organize your customers in a household, confirm that managed package is set up. If you create and define groups of individuals and households by using party relationship group and its related objects, confirm that party relationship group is set up. Then, add the FSCCashFlow FlexCard to a person account, household, or party relationship group record page. Users can add income and expenses to the FlexCard and view their client's cash flow summary.

### SEE ALSO:

#### [Capture Income and Expenses](#)

## Financial Account Management Standard Objects

Use Financial Account and related objects without installing the Financial Services Cloud managed package. Give your users greater control and flexibility over their data models, enabling seamless integration and decreased dependencies by using these standard objects. Enable the Financial Account Management Standard Objects setting and start using the Financial Account and related standard objects, which help you model financial accounts and related information for your users.

## IN THIS SECTION:

[Deliver Excellent Banking Service with the Retail Banking Console App](#)

Empower your bankers and customer service representatives (CSRs) to increase customer satisfaction and trust. You can access the Retail Banking console app without installing the Financial Services Cloud managed package. Model your customer's financial account information in the console app by using Financial Account and the related standard objects.

[Streamline Communication and Foster Customer Success with the Wealth Management Console App](#)

Streamline client interaction and service management for wealth managers. You can access the Wealth Management console app without installing the Financial Services Cloud managed package. Model your customer's financial account information in the console app by using Financial Account and the related standard objects.

[Manage Your Commercial Banking Activities Efficiently with the Commercial Banking Console App](#)

Commercial bankers can manage complex and changing customer requirements, compliance issues, and the competitive landscape. You can access the Commercial Banking console app without installing the Financial Services Cloud managed package. Model your customer's financial account information in the console app by using Financial Account and the related standard objects.

[Get Customer's Financial Account Information with Standard Objects](#)

Gain more control and flexibility when you work with financial account FlexCard components, such as FSCFinancialAccountDetails, FSCFinancialAccountsSummary, and FSCFinancialAccountTransactionDetails. Model your customer's financial account information in the FlexCard components by using Financial Account and the related objects that are available either in the Financial Services Cloud managed package or in the Financial Account Management Standard Objects data model.

[Add Flexibility to Financial Accounts in Service Processes with Standard Objects](#)

Gain more control and flexibility when you use financial account information in the OmniScripts of prebuilt service processes, such as Address Update, Fee Reversal, Complaint Management, and Transaction Dispute Management. Model your customer's financial account information in the service processes by using Financial Account and the related objects that are available either in the Financial Services Cloud managed package or in the Financial Account Management Standard Objects data model.

## SEE ALSO:

[Financial Account Management Standard Objects](#)

## Deliver Excellent Banking Service with the Retail Banking Console App

Empower your bankers and customer service representatives (CSRs) to increase customer satisfaction and trust. You can access the Retail Banking console app without installing the Financial Services Cloud managed package. Model your customer's financial account information in the console app by using Financial Account and the related standard objects.

**Where:** This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

**Who:** To use this feature, users need the Industry Service Excellence, OmniStudio Admin, and Financial Services Cloud Extension or FSC Service or FSC Foundation permission sets.

**Why:** The Retail Banking console app now offers a range of features to streamline service interactions for bankers and CSRs. The homepage acts as a central hub for accessing updates, accounts, cases, financial accounts, and applications, as well as tasks and events. They can also access a customer's profile card, review interaction history, schedule service appointments, and receive real-time alerts on record changes, financial accounts, and transactions all conveniently accessible on different object record detail pages.

**How:** To use Financial Account and related standard objects in the console app, from Setup, find and select **Financial Account Settings**, and then turn on Financial Account Management Standard Objects. From the App Launcher, find and select **Retail Banking**.

SEE ALSO:

[Retail Banking Console App for Financial Services Cloud](#)

## Streamline Communication and Foster Customer Success with the Wealth Management Console App

Streamline client interaction and service management for wealth managers. You can access the Wealth Management console app without installing the Financial Services Cloud managed package. Model your customer's financial account information in the console app by using Financial Account and the related standard objects.

**Where:** This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

**Who:** To use this feature, users need the Industry Sales Excellence, OmniStudio Admin, and Financial Services Cloud Extension or FSC Sales permission sets.

**Why:** The user-friendly interface offers a centralized hub for accessing key updates, accounts, cases, financial accounts, and applications, as well as tasks and events for efficient time management. Wealth managers can track financial accounts, progress towards goals, generate reports, view dashboards, access customer profiles, review interaction history, and schedule service appointments all conveniently accessible on different object record details pages.

**How:** To use Financial Account and related standard objects in the console app, from Setup, find and select **Financial Account Settings**, and then turn on Financial Account Management Standard Objects. From the App Launcher, find and select **Wealth Management**.

SEE ALSO:

[Wealth Management Console App for Financial Services Cloud](#)

## Manage Your Commercial Banking Activities Efficiently with the Commercial Banking Console App

Commercial bankers can manage complex and changing customer requirements, compliance issues, and the competitive landscape. You can access the Commercial Banking console app without installing the Financial Services Cloud managed package. Model your customer's financial account information in the console app by using Financial Account and the related standard objects.

**Where:** This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

**Who:** To use this feature, users need the Industry Sales Excellence, OmniStudio Admin, and Financial Services Cloud Extension or FSC Sales permission sets.

**Why:** The Commercial Banking console app offers prebuilt features to streamline client interactions for commercial bankers. The homepage shows key updates, recent accounts, cases, financial accounts, and applications, along with opportunities, tasks, and events to help bankers manage their time efficiently. Bankers can access a customer's profile card, view interaction history, financial account details, take relevant actions, and document interactions all conveniently accessible on different object record details pages.

**How:** To use Financial Account and related standard objects in the console app, from Setup, find and select **Financial Account Settings**, and then turn on Financial Account Management Standard Objects. From the App Launcher, find and select **Commercial Banking**.

SEE ALSO:

[Commercial Banking Console App for Financial Services Cloud](#)

## Get Customer's Financial Account Information with Standard Objects

Gain more control and flexibility when you work with financial account FlexCard components, such as FSCFinancialAccountDetails, FSCFinancialAccountsSummary, and FSCFinancialAccountTransactionDetails. Model your customer's financial account information in the FlexCard components by using Financial Account and the related objects that are available either in the Financial Services Cloud managed package or in the Financial Account Management Standard Objects data model.

**Where:** This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

**Who:** To use this feature, users need the Industry Service Excellence and OmniStudio Admin permission sets.

**How:** To use Financial Account and related standard objects in the financial account FlexCard components, from Setup, find and select **Financial Account Settings**, and then turn on Financial Account Management Standard Objects.

## Add Flexibility to Financial Accounts in Service Processes with Standard Objects

Gain more control and flexibility when you use financial account information in the OmniScripts of prebuilt service processes, such as Address Update, Fee Reversal, Complaint Management, and Transaction Dispute Management. Model your customer's financial account information in the service processes by using Financial Account and the related objects that are available either in the Financial Services Cloud managed package or in the Financial Account Management Standard Objects data model.

**Where:** This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

**Who:** To use this feature, users need the Industry Service Excellence and OmniStudio Admin permission sets.

**How:** To use Financial Account and related standard objects in the financial account FlexCard components, from Setup, find and select **Financial Account Settings**, and then turn on Financial Account Management Standard Objects.

## Get Started Faster with Guided Setups

Discover the new guided setups for Financial Services Cloud.

### IN THIS SECTION:

#### [Get Households Up and Running with Ease](#)

Households give you the flexibility to organize your customers in ways that are meaningful to you. With a new guided setup, set up standard objects and guided flows to create and define groups of individuals, such as households, without installing the Financial Services Cloud managed package.

#### [Get Record Rollups Up and Running with Ease](#)

Use record rollup definitions to streamline the aggregation of records from various objects or groups and to have a consolidated view of your data. With a new guided setup, set up record rollup definitions without installing the Financial Services Cloud managed package. Additionally, the guided setup walks you through the steps to run record rollup definitions periodically by using flows.

#### [Get Financial Accounts, Financial Account Parties, and Financial Account Transactions Up and Running with Ease](#)

Agents can have a comprehensive view of financial account details and resolve customer queries quickly and efficiently. Depending on your requirements, you can use the Financial Account and related standard objects to configure Financial Accounts, Financial Account Parties, and Financial Account Transactions. The new guided setup helps you assign permissions and customize Lightning pages to view financial accounts and transactions.

## Get Households Up and Running with Ease

Households give you the flexibility to organize your customers in ways that are meaningful to you. With a new guided setup, set up standard objects and guided flows to create and define groups of individuals, such as households, without installing the Financial Services Cloud managed package.

**Where:** This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

**How:** From Setup, go to Guided Setup, click **Group Membership and Households**, and then click the **Standard** tab.

## Get Record Rollups Up and Running with Ease

Use record rollup definitions to streamline the aggregation of records from various objects or groups and to have a consolidated view of your data. With a new guided setup, set up record rollup definitions without installing the Financial Services Cloud managed package. Additionally, the guided setup walks you through the steps to run record rollup definitions periodically by using flows.

**Where:** This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

**How:** From Setup, go to Guided Setup, click **Record Rollups**, and then click the **Standard** tab.

## Get Financial Accounts, Financial Account Parties, and Financial Account Transactions Up and Running with Ease

Agents can have a comprehensive view of financial account details and resolve customer queries quickly and efficiently. Depending on your requirements, you can use the Financial Account and related standard objects to configure Financial Accounts, Financial Account Parties, and Financial Account Transactions. The new guided setup helps you assign permissions and customize Lightning pages to view financial accounts and transactions.

**Where:** This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

**How:** From Setup, go to Guided Setup, select **Financial Account Management**, and then go to the **Standard** tab.

## Watch Financial Services Cloud Videos

New videos help your users with comprehensive guidance on the KYC data model and integrated onboarding in Financial Services Cloud.

- [Get to Know the Know Your Customer \(KYC\) Data Model for Financial Services Cloud](#) explores how to use the Know Your Customer (KYC) data model to onboard new customers.
- [Validate Documents in Document Checklist Items](#) explores how to validate a document in a Document Checklist Item against data from the party profile and its child records.
- [Learn How to Set Up the Summary Document Component](#) explores how to set up the Summary Document component to quickly access information and be better prepared for client meetings.
- [Learn How to Set Up the Summary Document Component](#) explores how to set up the Summary Document component to quickly access information and be better prepared for client meetings.
- [Get to Know the Discovery Framework Signature Element](#) explores how to set up the Signature element on a form to capture a respondent's signature.
- [Get to Know the Discovery Framework QR Code Element](#) explores how to set up the QR Code element on a form to let respondents open the URL or application from their mobile device.

- [Streamline Document Uploads in Assessments Using Discovery Framework Document Matrix Element](#) explores how to streamline the assessment process and ensure respondents upload correct documents by using the Discovery Framework Document Matrix element.
- [Grant Experience Cloud Site Guest Users Access to Discovery Framework OmniScripts](#) explores how to deploy Discovery Framework components on Experience Cloud sites for guest users.
- [Take a Tour of Interaction Summaries for Financial Services Cloud](#) explores how Interaction Summaries help bankers and financial advisors build and strengthen customer relationships.

## New and Changed Financial Services Cloud Object Fields

Do more with the new and updated Financial Services Cloud objects.

### Financial Account Management Standard Objects

Access more data through these new and changed standard objects.

#### **Store information about different financial accounts, such as investment accounts, bank accounts, and credit cards**

Use the new FinancialAccount object.

#### **Store information about the role played by a person or organization involved with a financial account, such as a beneficiary, owner, and a trustee**

Use the new FinancialAccountParty object.

#### **Store information about different balances of a financial account**

Use the new FinancialAccountBalance object.

#### **Store information about the transactions associated with a financial account**

Use the new FinancialAccountTransaction object.

#### **Store information about each address related to a financial account, such as communication address, billing address, and statement address**

Use the new FinancialAccountAddress object.

#### **Store information about a financial account statement**

Use the new FinancialAccountStatement object.

#### **Store information about the financial asset owned by an individual or account**

Use the new PartyFinclAsset object.

#### **Store information about the additional owner of an asset**

Use the new PartyFinclAssetAddlOwner object.

#### **Store information about a party asset associated with a financial account**

Use the new FinclAcctPtyFinclAsset object.

#### **Store information about a financial liability held by a party**

Use the new PartyFinancialLiability object.

#### **Store information about an additional party associated with a financial liability**

Use the new PartyFinclLiabAddlBrwr object.

#### **Store information about the card issued to a customer, such as debit card, credit card, prepaid card, gift card, and any other card type**

Use the new IssuedCard object.



**Store information about the fee that's applicable on the financial account to service various requests, such as a request for stop payment or a duplicate card**

Use the new `FinancialAccountFee` object.

**Store information about a financial security instrument, such as stocks and bonds**

Use the new `FinancialSecurity` object.

**Store information about the holdings associated with a financial account**

Use the new `SecuritiesHolding` object.

**Store information about the payment mandates given by a customer to their bank or financial institution to authorize a third party to collect payments from their account**

Use the new `PaymentMandate` object.

## Applicant Object

**Store the registered name of the business entity associated with the applicant**

Use the new `BusinessEntityName` field on the existing Applicant object.

**Store the primary contact for the business entity associated with the applicant**

Use the new `BusinessEntityPrimCtct` field on the existing Applicant object.

**Specify the type of the business entity associated with the applicant**

Use the new `BusinessEntityType` field on the existing Applicant object.

**Specify the type of the applicant**

Use the new `Type` field on the existing Applicant object.

## Business Client Engagement

**Represent the relationship between applicants, where an applicant can be either a business entity or an individual**

Use the new `ApplicantApplicantRelation` object.

**Specify the formal manner or approach used to officially state the stakeholder's role or position**

Use the new `DeclarationType` field on the existing `AccountAccountRelation` object.

**Indicate whether the stakeholder is a shareholder (true) or not (false)**

Use the new `IsShareholder` field on the existing `AccountAccountRelation` object.

**Specify the type of the shareholder**

Use the new `ShareholderType` field on the existing `AccountAccountRelation` object.

**Specify the shareholder's ownership type**

Use the new `ShareholderHierarchyRole` field on the existing `AccountAccountRelation` object.

**Represent the hierarchical level between the account and the intermediate shareholder**

Use the new `ShareholderHierarchyLevel` field on the existing `AccountAccountRelation` object.

**Store the total percentage of shares owned by the stakeholder, combining both direct and indirect ownership**

Use the new `TotalSharePercent` field on the existing `AccountAccountRelation` object.

**Specify the formal manner or approach used to officially state the stakeholder's role or position**

Use the new `DeclarationType` field on the existing `AccountContactRelation` object.

**Choose the type of the decision-making authority**

Use the new `DecisionMakingAuthorityType` field on the existing `AccountContactRelation` object.

**Indicate whether the stakeholder is a decision-making authority (true) or not (false)**

Use the new `IsDecisionMakingAuthority` field on the existing `AccountContactRelation` object.

**Indicate whether the stakeholder is a shareholder (true) or not (false)**

Use the new `IsShareholder` field on the existing `AccountContactRelation` object.

**Specify the type of the shareholder**

Use the new `ShareholderType` field on the existing `AccountContactRelation` object.

**Specify the shareholder's ownership type**

Use the new `ShareholderHierarchyRole` field on the existing `AccountContactRelation` object.

**Represent the hierarchical level between the account and the intermediate shareholder**

Use the new `ShareholderHierarchyLevel` field on the existing `AccountContactRelation` object.

**Store the total percentage of shares owned by the stakeholder, combining both direct and indirect ownership**

Use the new `TotalSharePercent` field on the existing `AccountContactRelation` object.

## Know Your Customer

**Specify whether the business entity is listed on a stock exchange (true) or not (false)**

Use the new `IsBusEntityListonStockExch` field on the existing `PartyProfile` object.

**Specify the country where the business entity was formed**

Use the new `BusinessEntityCtryofInc` field on the existing `PartyProfile` object.

**Specify the country where the business entity is registered**

Use the new `BusinessEntityCtryofRgstr` field on the existing `PartyProfile` object.

**Store the incorporation date of the business entity associated with the party profile**

Use the new `BusinessEntityIncDate` field on the existing `PartyProfile` object.

**Store the incorporation number of the business entity associated with the party profile**

Use the new `BusinessEntityIncNumber` field on the existing `PartyProfile` object.

**Store the registered name of the business entity associated with the party profile**

Use the new `BusinessEntityName` field on the existing `PartyProfile` object.

**Store previous names of the business entity associated with the party profile**

Use the new `BusinessEntityPreviousNames` field on the existing `PartyProfile` object.

**Store the registration date of the business entity associated with the party profile**

Use the new `BusinessEntityRgstrDate` field on the existing `PartyProfile` object.

**Store the registration number of the business entity associated with the party profile**

Use the new `BusinessEntityRgstrNumber` field on the existing `PartyProfile` object.

**Store the trading name of the business entity associated with the party profile**

Use the new `BusinessEntityTradeName` field on the existing `PartyProfile` object.

**Specify the type of the business entity associated with the party profile**

Use the new `BusinessEntityType` field on the existing `PartyProfile` object.

**Store the name of the business license issuing authority**

Use the new `BusLicIssAuthorityName` field on the existing `PartyProfile` object.

**Store the industry that a business entity operates in**

Use the new `Industry` field on the existing `PartyProfile` object.

**Store the unique code associated with the industry that a business entity operates in**

Use the new `IndustryClassificationCode` field on the existing `PartyProfile` object.

**Store the unique identifier of the business entity used in all financial transactions**

Use the new `LegalEntityIdentifier` field on the existing `PartyProfile` object.

**Store the name of the stock exchange where the business entity is listed**

Use the new `StockExchangeName` field on the existing `PartyProfile` object.

**Specify the type of the party profile associated with the applicant**

Use the new `Type` field on the existing `PartyProfile` object.

**Represent the trading regions of a party, covering both domestic and international locations, where the business entity is actively involved in trading activities**

Use the new `PartyBusinessRegion` object.

## Digital Lending

**Represents information about the application form product participant**

Use the new `AppFormProductParticipant` object.

**Represents the action items assigned to users by an underwriter on an application form**

Use the new `ApplicationActionItem` object.

**Represents the daily total number of application forms**

Use the new `ApplicationFormMetrix` object.

**Represents information about the application form participant**

Use the new `ApplicationFormParticipant` object.

**Represents the charges and fees associated to a product in an application**

Use the new `ApplicationFormProductFee` object.

**Represents the offer presented by the financial institution to the applicant**

Use the new `ApplicationFormProductProposal` object.

**Represents a junction between an application form and a seller product**

Use the new `ApplicationFormSellerItem` object.

**Represents a base rate that is defined by an authority**

Use the new `IndexRate` object.

**Represents information about the profile participant of a party**

Use the new `PartyProfileParticipant` object.

**Represents the authorization for the financial institution to extract payment or deposit funds into the applicant's financial account**

Use the new `PaymentMandate` object.

**Represents the charges and fees associated to a product**

Use the new `ProductFee` object.

**Represents the list price of the product as a percentage. For ex, a loan rate is 6.99%. 6.99% is the list price**

Use the new `ProductListRate` object.

**Represents the income of an individual.**

New `Party Profile`, `Income Source`, `Application Form`, `Verification Status`, `Income as of Date`, and `Read Only` fields on the `Party Income` object.

**Represents the expense incurred by an individual or account.**

New `Expenses As Of Date`, `Party Financial Liability`, `Usage Type`, `Verification Status`, and `Read Only` fields on the `Party Expense` object.

**Represents the financial asset owned by an individual or account.**

New `Purchase Amount`, `Pledge Amount`, `Verification Status`, `Lien Existing`, `Party Profile`, `Applicant`, and `Read Only` fields on the Party Financial Asset object.

**Represents an additional owner of a financial asset.**

New `Party Profile` and `Applicant` fields on the Party Financial Asset Additional Owner object.

**Represents a financial liability associated with an individual or an organization.**

New `Applicant`, `Interest Rate`, `Remaining Term`, `Estimated Monthly Payment`, `Lender`, `Liability Account Identifier`, `Repayment Active`, `Verification Status`, `Read Only`, `Outstanding Balance`, `Usage Type`, and `Application Form` fields on the Party Financial Liability.

**Represents an additional borrower of the application.**

New `Party Profile` and `Applicant` fields on the Party Financial Asset Additional Borrower object.

**Represents information about the profile of a party, such as a contact, account, or lead.**

New `Retirement Fund Account Number`, `Flagged Customer`, `Customer Reference Number`, and `Verified` fields on the Party Profile object.

**Represents the liabilities of the party.**

New `Verified` field on the Party Liabilities object.

**Represents the address of the party.**

New `Permanent Address`, `Current Address`, `High Risk Address`, and `Verified` fields on the Party Profile Address object.

## Integration Orchestration

Access more data through these new and changed standard objects.

**Specify the execution instance of an integration provider**

Use the new `IntegrationProviderExecution` object.

**Represents a decision requirement that is used to create integration provider records**

Use the new `IntegrationProviderDcsnRqmt` object.

## Integration Provider Definition

**Indicate whether the integration definition can be used in integration orchestration**

Use the new `CanUseInIntegrationOrch` field on the existing `IntegrationProviderDef` object.

**Store information about the FlexCard component associated with the integration provider**

Use the new `OmniUiCardConfig` field on the existing `IntegrationProviderDef` object.

**Indicate whether the integration definition mode is manual or automatic**

Use the new `IsManual` field on the existing `IntegrationProviderDef` object.

**Indicate whether the JSON payload from the request response must be stored**

Use the new `StorePayload` field on the existing `IntegrationProviderDef` object.

## New Connect REST API Resources

Get to know the resources available with Financial Services Cloud.

**Get the data of a retrieval summary definition by using the root record ID and the retrieval summary definition ID**

Make a GET request to the

`/connect/retrieval-summary/runtime/retrievalSummaryDefinitionApiName/rootRecordId` resource.

New response body: Retrieval Summary Result

**Create an application form with details**

Make a POST request to the `/connect/industries/application-forms` resource.

New request body: Create Application Form Details Input

New response body: Create Application Form

**Retrieve an application form**

Make a GET request to the `/connect/industries/application-forms/applicationFormId` resource.

New response body: Get Application Form

## Health Cloud

Einstein Generative AI automates assessment generation. Home Health optimizes visit scheduling and has a new component for Experience Cloud users. Integrated Care Management integrates with Milliman Care Guidelines (MCG) to bring industry-standard care guidelines and assessments to Health Cloud. The Group Benefits app helps insurance sales agents track leads and enroll members better to boost sales performance. Intelligent Appointment Management now supports multi-step scheduling. Provider Network Management gets a new app.

### IN THIS SECTION:

#### [Einstein for Health Cloud](#)

Harness the power of Einstein generative AI to streamline healthcare operations and enhance patient health outcomes. Health Cloud's Assessment Generation leverages Einstein's capabilities to simplify the labor-intensive process of creating assessment questions by efficiently extracting question details from complex documents.

#### [Home Health Enhancements](#)

Streamline care coordination and deliver personalized patient care with the latest enhancements from Home Health. Use the new Home Health Patient Visits lightning component to transform how patients engage with their home health agency. Enhance productivity and health outcomes with manual assignment of resources, prioritization of skill preferences, and simplified scheduling of dependent visits and group visits.

#### [Integrated Care Management Enhancements](#)

The new integration with Milliman Care Guidelines (MCG) enables Integrated Care Management users to access industry standard care guidelines and make informed decisions on patient care. Administer MCG guidelines-based assessments and create personalized care plans from completed assessments. Optionally, administer secondary assessments suggested from MCG assessments. Quickly find every instance of an MCG assessment by using the Assessment History component. The enhanced Update Care Plan OmniScript now has an option to update care plans using care plan templates.

#### [Group Benefits in Health Cloud](#)

Drive insurance sales success with the Group Benefits app. The app supports internal sales agents with tools for monitoring accounts and opportunities, creating timely quotes, and enrolling members efficiently all in one place.

### [Intelligent Appointment Management Enhancements](#)

Streamline complex scheduling tasks by using multi-step scheduling to book a series of related appointments at once. Easily modify appointments when patients and providers want to change appointment dates, times, and other details. Ensure a smoother Intelligent Appointment Management implementation by getting step-by-step assistance in an expanded guided setup experience for administrators.

### [Medication Management Updates](#)

The Medication Management Add-On license, which was previously required to use Medication Reconciliation and Medication Therapy Management, is deprecated and not available anymore.

### [Patient Program Outcome Management \(Pilot\)](#)

Use Patient Program Outcome Management to optimize program effectiveness, track patients' progress in a program, and measure program outcomes. Improve patient experience and adherence with tailored assessments, store calculated response scores, and assess outcomes to optimize patient service programs. Provide insights to improve case manager efficacy, identify programs that deviate from expected outcomes, and enable preventive actions.

### [Participant Management](#)

Reduce the time it takes to discover clinical trials by adding the Criteria-Based Search and Filter to your Experience Cloud site. Quickly identify participants meeting clinical trial criteria and streamline the application process for eligible participants by using built-in Omnistudio components. Eliminate complex paper-based processes with a structured digital approach to capture participant consent.

### [Pharmacy Benefits Verification](#)

Prioritize getting patients on their prescribed medications faster. A clear and guided process empowers agents to quickly gain a comprehensive understanding of the coverage details of a patient's pharmacy benefits, including coverage status, co-pay, and co-insurance. Agents can also generate a summary of medication benefits within a care program, and easily share the benefits package with patients, fostering informed decisions about their treatment plans.

### [Provider Network Management Enhancements](#)

Use a new app to enable payers to seamlessly complete the recruiting, credentialing, and contracting processes in the provider management lifecycle. Integrate the Provider Network Management app with DocuSign to collect the e-signatures of applicants, and with reCAPTCHA to ensure that the applicants are humans, not bots. OmniScripts such as Primary Source Verification and Provider Recruitment now use standard fields.

### [Provider Search Enhancements](#)

Scan relevant details more easily in search result cards with dynamic layouts. Get more accurate search results by matching text and text area field values to specific fields. Refine the Provider Search experience by customizing which data is synchronized and searchable. Ensure a smoother Provider Search implementation by getting step-by-step assistance in an expanded guided setup experience for administrators.

### [Optimize Patient Care by Using Segmentation Insights](#)

Gain comprehensive insights into patient demographics, risk scores, and health conditions by using the new Patient Segmentation dashboard. Identify high-risk patients and assess their priorities. Strategically allocate resources to enhance patient care and optimize resource utilization.

### [Health Cloud Console](#)

Health Cloud has a new console app.

### [Health Cloud Managed Package](#)

We've made changes to how Health Cloud uses the Health Cloud Managed Package.

### [Health Cloud Admin Guide](#)

Find the Health Cloud Admin Guide in Salesforce Help.

### [Health Cloud Has New and Changed Objects](#)

Store and access more data with these new and changed Health Cloud objects.

### [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 Connect REST API Resources in Health Cloud](#)

Connect REST APIs help customers, partners, and ISVs integrate with Salesforce software and UIs.

### [New and Changed Invocable Actions in Health Cloud](#)

Use the new and changed invocable actions for Health Cloud.

### [New Metadata Types in Health Cloud](#)

Learn more about the new metadata types in Health Cloud.

## 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 (CCAs) can quickly resolve customer requests by launching Aura components. CCAs can now search for actions based on semantic search or the meaning of search keywords. Out-of-the-Box Deployment is renamed as Standard Deployment. Use the new and updated objects to provide CCAs with recommended actions and Aura components through Action Launcher.

- [Criteria-Based Search and Filter](#)

Enhance the Provider Search experience for authenticated and guest users by adding Criteria-Based Search and Filter to your Experience Cloud sites. Help users visualize data by showing providers from search results in an interactive map. Make search results displayed as cards easier to manage by providing sorting options. Share data from search results by using the prebuilt Copy Records and Create Report actions for Criteria-Based Search and Filter.

- [Business Rules Engine](#)

Incorporate new logic into expression set versions efficiently by changing subexpressions in fewer clicks. Map a subexpression's variables to the local resources of the expression set that the subexpression is used in. Easily deactivate or modify the decision tables that are referenced in expression set versions. Use medium-scale decision tables to process a large volume of rows. Save time and effort by using ready-to-use templates to create decision tables. Enhance the decision-making capability of your decision tables by using the Does Not Match and Contains operators.

- [Data Processing Engine](#)

Upload large amounts of data into your definition with CSV files. Use Data Cloud runtime with extended functionality for join, filter, formula, and writeback nodes.

- [Intelligent Document Reader](#)

Get Intelligent Document Reader to easily extract unstructured content and tables from documents, excluding unwanted records.

- [Intelligent Form Reader](#)

Get Intelligent Form Reader to easily extract unstructured content and tables from documents, excluding unwanted records.

## Einstein for Health Cloud

Harness the power of Einstein generative AI to streamline healthcare operations and enhance patient health outcomes. Health Cloud's Assessment Generation leverages Einstein's capabilities to simplify the labor-intensive process of creating assessment questions by efficiently extracting question details from complex documents.

**IN THIS SECTION:**[Automate Assessment Generation With Einstein Generative AI](#)

Transform how you handle assessments with Assessment Generation's precise document analysis and intricate detail extraction. Healthcare organizations can save time, reduce costs, and optimize operations by automatically generating assessment questions from uploaded PDF or DOCX documents. Administrators can easily set up a variety of healthcare assessments to screen a patient's health comprehensively and improve the overall quality of healthcare.

**Automate Assessment Generation With Einstein Generative AI**

Transform how you handle assessments with Assessment Generation's precise document analysis and intricate detail extraction. Healthcare organizations can save time, reduce costs, and optimize operations by automatically generating assessment questions from uploaded PDF or DOCX documents. Administrators can easily set up a variety of healthcare assessments to screen a patient's health comprehensively and improve the overall quality of healthcare.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions with the Health Cloud and Einstein GPT Platform add-on licenses. Einstein generative AI is available in Lightning Experience.

**How:** From Setup, go to the Einstein Setup page, and turn on Einstein. From Setup, go to the Industries AI Setup page, and turn on Industries AI Setup. Next, from Setup, go to General Settings under Discovery Framework, and enable Discovery Framework and Generative AI Assessment Questions.

**SEE ALSO:**

[Salesforce Help: Einstein Generative AI for Health Cloud](#)

**Home Health Enhancements**

Streamline care coordination and deliver personalized patient care with the latest enhancements from Home Health. Use the new Home Health Patient Visits lightning component to transform how patients engage with their home health agency. Enhance productivity and health outcomes with manual assignment of resources, prioritization of skill preferences, and simplified scheduling of dependent visits and group visits.

**IN THIS SECTION:**[Revolutionize Patient Care With Home Health](#)

Enhance patient engagement, improve care coordination, and promote efficient health monitoring with the help of the new Home Health Patient Visits lightning component. With this component available on an Experience cloud site, patients can easily connect with their home health agency and access their past, current, and upcoming home visits from their personal devices.

[Optimize Home Visit Scheduling With Manual Resource Assignment](#)

Give your schedulers enhanced visibility and greater control over care resource assignment for home visits. Based on patients' specific resource preferences, schedulers can either accept the default auto assignment or choose the new manual assignment to handpick the most suitable resource from a set of recommendations. With this added flexibility, schedulers gain valuable insights into the assignment process, enabling them to implement a personalized and streamlined approach to patient care.

[Provide Personalized Care by Recording Patient Preference Order](#)

Schedulers can now find the most suitable care resource for patients by collecting their preference orders for care resource skills. Home Health's default scheduling policy considers the weight of each skill preference along with the patient's preference order. This approach empowers patients to make well-informed decisions regarding their skill preferences, which promotes collaborative and patient-centered care, boosts patient satisfaction rates, minimizes grievances, and improves overall health outcomes.



### [Streamline Dependent Home Visit Scheduling With a New Flow](#)

Reduce administrative delays and procedural issues by empowering your schedulers to manage dependent home visits more easily. When your schedulers create two dependent visits, the new Create Home Visit Dependency flow automates the creation of the appointment dependency record and links the visits. Also, when your schedulers cancel or reschedule one of the dependent visits, Home Health performs the same action on the other visit as well. These time-saving solutions help schedulers avoid any manual errors and focus on care continuity.

### [Deliver Effective Patient Care With Advanced Group Visit Capabilities](#)

Your schedulers can now record the exact address of a group visit while scheduling one, helping care resources to easily track and coordinate the visit and provide timely care. Additionally, schedulers can add a patient only once to a group visit even if the patient has multiple clinical service requests for the visit's work type. In line with these changes, we've updated the Bundle Home Healthcare Visits flow to simplify scheduling and improve the efficiency of group visits.

### [Elevate Scheduler Efficiency With an Improved User Interface](#)

Help schedulers view related visits and group visits directly from the patient's record page with the updated Home Health Visit component. With active links in the Related Visit and Related Group columns, schedulers can save time, access accurate details, and reduce repetitive navigation.

### [Expedite Your Home Health Setup](#)

The enhanced guided setup walks you through configuring home visit dependencies, setting up patient's preference order, and building an experience cloud site for patients. Maximize your productivity with these simple, clear steps for prerequisite checks and process setups. Stay focused and on track with links to other in-app setup pages and detailed help articles.

## Revolutionize Patient Care With Home Health

Enhance patient engagement, improve care coordination, and promote efficient health monitoring with the help of the new Home Health Patient Visits lightning component. With this component available on an Experience cloud site, patients can easily connect with their home health agency and access their past, current, and upcoming home visits from their personal devices.

**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 Home Health Patient permission set license.

**How:** Enable Digital Experiences. Build an Experience cloud site and then place the Home Health Patient Visits component on the home page. Use Sharing Settings to create sharing rules for customer portal users and partner users.

SEE ALSO:

[Salesforce Help: Home Health Portal for Patients](#)

[Salesforce Help: Set Up Home Health for Patients](#)

## Optimize Home Visit Scheduling With Manual Resource Assignment

Give your schedulers enhanced visibility and greater control over care resource assignment for home visits. Based on patients' specific resource preferences, schedulers can either accept the default auto assignment or choose the new manual assignment to handpick the most suitable resource from a set of recommendations. With this added flexibility, schedulers gain valuable insights into the assignment process, enabling them to implement a personalized and streamlined approach to patient care.

**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:** No additional configuration is necessary.

SEE ALSO:

[Salesforce Help: Schedule Visits with Home Health](#)

[Salesforce Help: Set Up Home Health](#)

## Provide Personalized Care by Recording Patient Preference Order

Schedulers can now find the most suitable care resource for patients by collecting their preference orders for care resource skills. Home Health's default scheduling policy considers the weight of each skill preference along with the patient's preference order. This approach empowers patients to make well-informed decisions regarding their skill preferences, which promotes collaborative and patient-centered care, boosts patient satisfaction rates, minimizes grievances, and improves overall health outcomes.

**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 Patient Preferences for Home Health lightning component on the Person Account record page. In Setup, define skills and skill types to represent the preferences that you support. Then, for each skill type, define service objectives for the Skill Preference record type. Add the service objectives to the Home Health Default Scheduling Policy.

SEE ALSO:

[Salesforce Help: Add Patient Preferences with Home Health](#)

[Salesforce Help: Define Skills, Preferences, Objectives, and Work Types for Home Health](#)

## Streamline Dependent Home Visit Scheduling With a New Flow

Reduce administrative delays and procedural issues by empowering your schedulers to manage dependent home visits more easily. When your schedulers create two dependent visits, the new Create Home Visit Dependency flow automates the creation of the appointment dependency record and links the visits. Also, when your schedulers cancel or reschedule one of the dependent visits, Home Health performs the same action on the other visit as well. These time-saving solutions help schedulers avoid any manual errors and focus on care continuity.

**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 Setup, go to Flows, and then clone and activate the Create Home Visit Dependency flow.

In the Lightning App Builder, place the Home Health Visits lightning component on the Person Account record page.

SEE ALSO:

[Salesforce Help: Schedule Dependent Visits with Home Health](#)

[Salesforce Help: Clone and Activate the Create Home Visit Dependency Flow](#)

## Deliver Effective Patient Care With Advanced Group Visit Capabilities

Your schedulers can now record the exact address of a group visit while scheduling one, helping care resources to easily track and coordinate the visit and provide timely care. Additionally, schedulers can add a patient only once to a group visit even if the patient has multiple clinical service requests for the visit's work type. In line with these changes, we've updated the Bundle Home Healthcare Visits flow to simplify scheduling and improve the efficiency of group visits.

**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: Schedule Group Visits with Home Health](#)

[Salesforce Help: Create a Bundle Policy for Group Visits](#)

## Elevate Scheduler Efficiency With an Improved User Interface

Help schedulers view related visits and group visits directly from the patient's record page with the updated Home Health Visit component. With active links in the Related Visit and Related Group columns, schedulers can save time, access accurate details, and reduce repetitive navigation.

**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: Manage Home Visits and Authorizations](#)

[Salesforce Help: Set Up the Home Health Visits Component](#)

## Expedite Your Home Health Setup

The enhanced guided setup walks you through configuring home visit dependencies, setting up patient's preference order, and building an experience cloud site for patients. Maximize your productivity with these simple, clear steps for prerequisite checks and process setups. Stay focused and on track with links to other in-app setup pages and detailed help articles.

**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

The new integration with Milliman Care Guidelines (MCG) enables Integrated Care Management users to access industry standard care guidelines and make informed decisions on patient care. Administer MCG guidelines-based assessments and create personalized care plans from completed assessments. Optionally, administer secondary assessments suggested from MCG assessments. Quickly find every instance of an MCG assessment by using the Assessment History component. The enhanced Update Care Plan OmniScript now has an option to update care plans using care plan templates.

### IN THIS SECTION:

#### [Access MCG Assessments and Care Guidelines](#)

Integrated Care Management now supports assessments and evidence-based care guidelines from MCG Health. Users can search, administer, and view MCG assessments using the updated Assessment component.

#### [Create Care Plans Using MCG Assessments](#)

Use MCG assessments to create care plans, complete with problems, goals, and interventions. Similar to the Discovery Framework assessments that you can configure in Salesforce, MCG assessments recommend a personalized care plan for a patient based on the responses to the assessment. Personalized care plans, informed by MCG, ensure patients receive the highest quality of care.

#### [Administer Assessments Suggested from MCG Assessments](#)

On completion of an MCG assessment, a patient is recommended secondary assessments based on their responses to the primary assessment. Suggested assessments help care providers thoroughly evaluate patients so that any potential risks or comorbidities can be examined in a timely manner. If the suggested assessment isn't relevant to the patient, care managers can change the status to **Ignored**.

#### [Track MCG Assessment History](#)

Track the history of MCG assessments with the Assessment History component. The component gives care managers an overview of every instance of an assessment, including details such as the status and submitted date. With every instance of an assessment listed in a single place, care managers can easily monitor patient progress without having to navigate to other pages.

#### [Update Care Plans Using Care Plan Templates](#)

Update existing care plans by adding new problems, goals, and interventions using predefined care plan templates. The OmniScript shows care managers new problems, goals, and interventions based on the care plan templates that they select. A comparative view of the recommended and current problems, goals, and interventions makes it easier to update care plans as needed.

#### [Automatically Share Care Task Records](#)

In Integrated Care Management, save time and effort by automatically sharing Care Task records with users who have access to the associated Task records.

## Access MCG Assessments and Care Guidelines

Integrated Care Management now supports assessments and evidence-based care guidelines from MCG Health. Users can search, administer, and view MCG assessments using the updated Assessment component.

**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. Users also need MCG API credentials to access MCG care guidelines from Health Cloud.

**Why:** MCG care guidelines help healthcare professionals provide the appropriate care and treatment, resulting in improved outcomes such as reduced length of stay and higher independent quality ratings.

**How:** Turn on **MCG Care Guidelines** in Setup. Create an integration definition for MCG. Then, in Lightning App Builder, add the integration definition to the Assessment component, Assessment History component, and IndustriesHCCarePlanManager FlexCard.

SEE ALSO:

[Salesforce Help: MCG Integration with Integrated Care Management](#)

## Create Care Plans Using MCG Assessments

Use MCG assessments to create care plans, complete with problems, goals, and interventions. Similar to the Discovery Framework assessments that you can configure in Salesforce, MCG assessments recommend a personalized care plan for a patient based on the responses to the assessment. Personalized care plans, informed by MCG, ensure patients receive the highest quality of care.

**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. Users also need MCG API credentials to access MCG care guidelines from Health Cloud.

**How:** Turn on **MCG Care Guidelines** in Setup. Place the **IndustriesHCCarePlanManager** FlexCard on the person account, case, or clinical service request record page. Care managers can click **New Care Plan** on the care plan interface or on completion of an MCG assessment.

SEE ALSO:

[Salesforce Help: Add MCG-Related Components to Record Pages](#)

[Salesforce Help: Complete an Assessment to Use with Integrated Care Management](#)

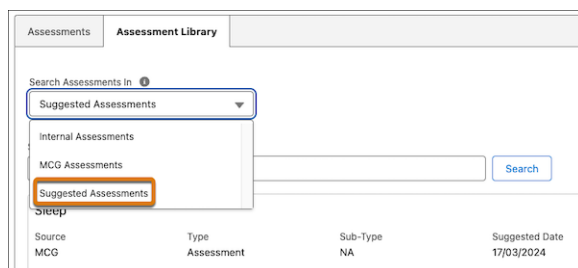
## Administer Assessments Suggested from MCG Assessments

On completion of an MCG assessment, a patient is recommended secondary assessments based on their responses to the primary assessment. Suggested assessments help care providers thoroughly evaluate patients so that any potential risks or comorbidities can be examined in a timely manner. If the suggested assessment isn't relevant to the patient, care managers can change the status to **Ignored**.

**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. Users also need MCG API credentials to access MCG care guidelines from Health Cloud.

**How:** Turn on **MCG Care Guidelines** in Setup. Place the Assessment component on the account, case, or clinical service request record page. In the Assessment component, care managers can search assessments in **Suggested Assessments**. Alternatively, care managers can see suggested assessments on the primary assessment completion screen.



SEE ALSO:

[Salesforce Help: Add MCG-Related Components to Record Pages](#)

[Salesforce Help: Complete an Assessment to Use with Integrated Care Management](#)

## Track MCG Assessment History

Track the history of MCG assessments with the Assessment History component. The component gives care managers an overview of every instance of an assessment, including details such as the status and submitted date. With every instance of an assessment listed in a single place, care managers can easily monitor patient progress without having to navigate to other 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 Care Plans Access permission set license. Users also need MCG API credentials to access MCG care guidelines from Health Cloud.

**How:** Turn on **MCG Care Guidelines** in Setup. In Lightning App Builder, place the DiscoveryFrameworkAssessmentHistory FlexCard on the assessment record page. Then, add the MCG integration definition to the FlexCard.

SEE ALSO:

[Salesforce Help: Add MCG-Related Components to Record Pages](#)

[Salesforce Help: Track MCG Assessment History](#)

## Update Care Plans Using Care Plan Templates

Update existing care plans by adding new problems, goals, and interventions using predefined care plan templates. The OmniScript shows care managers new problems, goals, and interventions based on the care plan templates that they select. A comparative view of the recommended and current problems, goals, and interventions makes it easier to update care plans as needed.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions with Health Cloud.

**Who:** This feature is available to users with the Care Plans Access permission set license.

**Why:** 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.

**How:** Select **Care Plan Templates** as the method for updating the care plan in the Update Care Plan OmniScript.

SEE ALSO:

[Salesforce Help: Update Care Plans](#)

## Automatically Share Care Task Records

In Integrated Care Management, save time and effort by automatically sharing Care Task records with users who have access to the associated Task records.

**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:** Turn on **Automatic Sharing of Care Task Records** from the Integrated Care Management settings page in Setup.

SEE ALSO:

[Salesforce Help: Enable Integrated Care Management](#)

## Group Benefits in Health Cloud

Drive insurance sales success with the Group Benefits app. The app supports internal sales agents with tools for monitoring accounts and opportunities, creating timely quotes, and enrolling members efficiently all in one place.

IN THIS SECTION:


### [Boost Sales Productivity with the Group Benefits App](#)

Internal insurance sales agents now have a centralized location where they can track leads, create quotes, manage enrollment census data, and enroll group members and dependents in selected insurance plans. Account, opportunity, quote, and contract page layouts are tailored to the needs of sales agents. Customizable workflows walk agents through steps to create quotes for small group plans, generate quote documents, and complete enrollment for small and large group plans. Create a document template for small group quotes, and then clone and customize the template to meet various business requirements.

## Boost Sales Productivity with the Group Benefits App

Internal insurance sales agents now have a centralized location where they can track leads, create quotes, manage enrollment census data, and enroll group members and dependents in selected insurance plans. Account, opportunity, quote, and contract page layouts are tailored to the needs of sales agents. Customizable workflows walk agents through steps to create quotes for small group plans, generate quote documents, and complete enrollment for small and large group plans. Create a document template for small group quotes, and then clone and customize the template to meet various business requirements.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions with Health Cloud, the Insurance managed package, and the Insurance Industries Extension managed package. The Group Benefits app requires OmniStudio with Managed Package Runtime disabled.

 **Important:** Don't install the Insurance managed package if the OmniStudio Foundation managed package is already installed. Having both packages installed results in duplicate components, and the Group Benefits app doesn't work in orgs with duplicate OmniStudio components. If your org already has the OmniStudio package installed and you want to install Insurance, contact Salesforce support.

**Who:** This feature is available to users with the Health Cloud Foundation and the Industries Group Benefits User permission set. Make sure you assign the Industries Group Benefits User permission set, not the Insurance Group Benefits User permission set. To configure OmniScripts, users need the OmniStudio Admin permission set. To design document templates and generate documents, users need the DocGen Designer permission set. For details about managing permissions required for Insurance objects, see Insurance documentation.

**How:** If you haven't already done so, enable OmniStudio Server-Side document generation. Create or customize a document template to use for small group quotes. Configure the Group Benefits Document Generation, Small Group Quoting, and Enrollment OmniScripts. In the Group Benefits app, on the home page and on record pages such as account and opportunity, add the small group quote and enrollment workflows.

SEE ALSO:

[Salesforce Help: Group Benefits App \(can be outdated or unavailable during release preview\)](#)

## Intelligent Appointment Management Enhancements

Streamline complex scheduling tasks by using multi-step scheduling to book a series of related appointments at once. Easily modify appointments when patients and providers want to change appointment dates, times, and other details. Ensure a smoother Intelligent Appointment Management implementation by getting step-by-step assistance in an expanded guided setup experience for administrators.

### IN THIS SECTION:

#### [Book a Series of Appointments with Multi-Step Scheduling](#)

Make it easier for schedulers to book a series of related appointments at once. Reduce administrative overhead for schedulers by creating templates that specify the types of appointments to book in a series, in the right order, and at the right time intervals. A prebuilt workflow walks schedulers through the steps to book each of the appointments and confirms the availability of appointment slots each step of the way. Schedulers can skip appointments in a series, cancel one or all of the appointments in a series, and act swiftly when notifications alert them to scheduling issues.

#### [Reduce Friction in Managing Appointment Changes](#)

Schedulers can now accommodate patient and provider preferences and availability by modifying appointments rather than canceling and rebooking them. They can change details such as the date, time, and provider. If an appointment was booked along with other appointments in a multi-step process, the scheduler can view the overall context and modify subsequent appointments in the series. Modifying appointments is faster than canceling and rebooking, and a smoother rescheduling process can help reduce no-shows and improve patient outcomes.

#### [Get Enhanced Guidance to Set Up Intelligent Appointment Management](#)

The updated guided setup walks you through setting up permissions and essential data, Salesforce Scheduler, an external scheduling system, optional features, self-scheduling, and multi-step scheduling. From start to finish, guided setup leads you through each step with clear, simple directions, and links to contextual Help pages.

## Book a Series of Appointments with Multi-Step Scheduling

Make it easier for schedulers to book a series of related appointments at once. Reduce administrative overhead for schedulers by creating templates that specify the types of appointments to book in a series, in the right order, and at the right time intervals. A prebuilt workflow walks schedulers through the steps to book each of the appointments and confirms the availability of appointment slots each step of the way. Schedulers can skip appointments in a series, cancel one or all of the appointments in a series, and act swiftly when notifications alert them to scheduling issues.

**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 Appointment Management permission set.

**How:** To add multi-step scheduling to the Intelligent Appointment Management console, in the Healthcare Appointment Scheduler component, select **Show multi-step scheduling**. To build a template for a series of appointments, create a work procedure that represents an overall process, and create work procedure steps that represent the appointments to schedule as part of the process. For example, create a template for checkups and tests before surgery, and a template for a vaccination series. Intelligent Appointment Management can book up to 20 appointment slots in a series.

To schedule a series of appointments, in the Intelligent Appointment Management console, click **Multi-Step Scheduling**.

### SEE ALSO:

[Salesforce Help: Set Up Multi-Step Scheduling for Intelligent Appointment Management \(can be outdated or unavailable during release preview\)](#)



## Reduce Friction in Managing Appointment Changes

Schedulers can now accommodate patient and provider preferences and availability by modifying appointments rather than canceling and rebooking them. They can change details such as the date, time, and provider. If an appointment was booked along with other appointments in a multi-step process, the scheduler can view the overall context and modify subsequent appointments in the series. Modifying appointments is faster than canceling and rebooking, and a smoother rescheduling process can help reduce no-shows and improve patient 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 Health Cloud Appointment Management permission set.

**How:** To show the Modify action in the Intelligent Appointment Management console, in the Healthcare Appointment Scheduler component, select **Show appointments list**.

To modify an appointment in an appointment list, select the **Modify Appointment** action.

SEE ALSO:

[Salesforce Help: Show an Appointment List with Modify and Cancel Actions \(can be outdated or unavailable during release preview\)](#)

## Get Enhanced Guidance to Set Up Intelligent Appointment Management

The updated guided setup walks you through setting up permissions and essential data, Salesforce Scheduler, an external scheduling system, optional features, self-scheduling, and multi-step scheduling. From start to finish, guided setup leads you through each step with clear, simple directions, and links to contextual Help 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 Health Cloud Appointment Management permission set.

**How:** From Setup, in the Quick Find box, enter *Appointment*, and then select **Intelligent Appointment Management**. Turn on Intelligent Appointment Management. On each tab, enable the features you want to use and follow the guided setup steps.

SEE ALSO:

[Salesforce Help: Intelligent Appointment Management \(can be outdated or unavailable during release preview\)](#)

## Medication Management Updates

The Medication Management Add-On license, which was previously required to use Medication Reconciliation and Medication Therapy Management, is deprecated and not available anymore.

IN THIS SECTION:

[Medication Management Add-On License is Deprecated](#)

You no longer need the Medication Management Add-On license to use Medication Reconciliation and Medication Therapy Management in Health Cloud. With the deprecation of the Medication Management Add-On license, these features are now available with the Health Cloud Add-On license as of Summer '24.

## Medication Management Add-On License is Deprecated

You no longer need the Medication Management Add-On license to use Medication Reconciliation and Medication Therapy Management in Health Cloud. With the deprecation of the Medication Management Add-On license, these features are now available with the Health Cloud Add-On license as of Summer '24.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions of Health Cloud.

## Patient Program Outcome Management (Pilot)

Use Patient Program Outcome Management to optimize program effectiveness, track patients' progress in a program, and measure program outcomes. Improve patient experience and adherence with tailored assessments, store calculated response scores, and assess outcomes to optimize patient service programs. Provide insights to improve case manager efficacy, identify programs that deviate from expected outcomes, and enable preventive actions.



**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.

### IN THIS SECTION:

#### [Store Outcome Data in the Patient Program Outcome Management Data Model \(Pilot\)](#)

With Patient Program Outcome Management, you can define program outcomes and indicators, and link program outcomes and patient progress with the ability to measure at the outcomes level. This data is stored in the Patient Program Outcome Management data model, which in turn is based on the Outcome Management data model. Patient Program Outcome Management also leverages the Discovery Framework data model to support assessments.

#### [Calculate Outcome Metrics Using Salesforce Flows \(Pilot\)](#)

You can create Salesforce flows with your own outcome calculation algorithms to store results in the Patient Program Outcome Management data model. Once you create a compatible flow and add it to a record in Indicator Definition, the Calculate Indicator Result button appears on Indicator Performance Period records.

### SEE ALSO:

[Salesforce Help: Patient Program Outcome Management](#)

## Store Outcome Data in the Patient Program Outcome Management Data Model (Pilot)

With Patient Program Outcome Management, you can define program outcomes and indicators, and link program outcomes and patient progress with the ability to measure at the outcomes level. This data is stored in the Patient Program Outcome Management data model, which in turn is based on the Outcome Management data model. Patient Program Outcome Management also leverages the Discovery Framework data model to support assessments.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions with Health Cloud or Life Sciences Cloud license.



**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:** Patient Program Outcome Management is available starting in June 2024.

**Who:** This feature is available to users with the Health Cloud Foundation (for Health Cloud) or Health Cloud Starter (for Life Sciences Cloud), and Patient Program Outcome Management permission set.

## Calculate Outcome Metrics Using Salesforce Flows (Pilot)

You can create Salesforce flows with your own outcome calculation algorithms to store results in the Patient Program Outcome Management data model. Once you create a compatible flow and add it to a record in Indicator Definition, the Calculate Indicator Result button appears on Indicator Performance Period records.

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**When:** Patient Program Outcome Management is available starting in June 2024.

**Who:** This feature is available to users with the Health Cloud Foundation (for Health Cloud) or Health Cloud Starter (for Life Sciences Cloud), and Patient Program Outcome Management permission set.

**How:** Create a flow with the process type Indicator Result Flow and associate it with an Indicator Definition record. After the flow is added to an indicator definition, the Calculate Indicator Result button appears on Indicator Performance Period records associated with that indicator definition. Click this button to launch the flow that you created.

## Participant Management

Reduce the time it takes to discover clinical trials by adding the Criteria-Based Search and Filter to your Experience Cloud site. Quickly identify participants meeting clinical trial criteria and streamline the application process for eligible participants by using built-in Omnistudio components. Eliminate complex paper-based processes with a structured digital approach to capture participant consent.

For more information, see [Participant Management](#).

## Pharmacy Benefits Verification

Prioritize getting patients on their prescribed medications faster. A clear and guided process empowers agents to quickly gain a comprehensive understanding of the coverage details of a patient's pharmacy benefits, including coverage status, co-pay, and co-insurance. Agents can also generate a summary of medication benefits within a care program, and easily share the benefits package with patients, fostering informed decisions about their treatment plans.

### IN THIS SECTION:

#### [View a Comprehensive Summary of Patient's Member Plans](#)

View details of a patient's associated member plans at a glance. Use these plans to verify the pharmacy benefits of a patient for the prescribed drug.

#### [Raise Verification Requests for Pharmacy Benefits](#)

Pharmacy agents can initiate a pharmacy benefits verification request for a patient against a member plan from the PharmacyBenefitsVerification flexcard on the care program enrollee record page. Agents can click the Verify Manually button on this flexcard to initiate the omniscrypt that creates the verification request. This request includes information about the patient, prescriber, prescribed drug, and preferred pharmacy.

### [Record Responses from Payers](#)

Agents can use the PharmacyBenefitsVerification FlexCard to record the responses they get from payers about the verification requests they raise for their patients. Agents can then use these responses to generate comprehensive reports that they can share with patients or providers to make informed decisions.

SEE ALSO:

[Salesforce Help: Pharmacy Benefits Verification](#)

## View a Comprehensive Summary of Patient's Member Plans

View details of a patient's associated member plans at a glance. Use these plans to verify the pharmacy benefits of a patient for the prescribed drug.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions with Health Cloud or Life Sciences Cloud license.

**When:** Pharmacy Benefits Verification is available starting in June 2024.

**Who:** This feature is available to users with the Health Cloud Foundation (for Health Cloud) or Health Cloud Starter (for Life Sciences Cloud), and Manage Pharmacy Benefits Verification permission set.

**How:** Add the `PharmacyBenefitsVerification` flexcard to the Care Program Enrollee record page.

## Raise Verification Requests for Pharmacy Benefits

Pharmacy agents can initiate a pharmacy benefits verification request for a patient against a member plan from the PharmacyBenefitsVerification flexcard on the care program enrollee record page. Agents can click the Verify Manually button on this flexcard to initiate the omniscrypt that creates the verification request. This request includes information about the patient, prescriber, prescribed drug, and preferred pharmacy.

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**How:** Add the `PharmacyBenefitsVerification` flexcard to the Care Program Enrollee record page.

## Provider Network Management Enhancements

Use a new app to enable payers to seamlessly complete the recruiting, credentialing, and contracting processes in the provider management lifecycle. Integrate the Provider Network Management app with DocuSign to collect the e-signatures of applicants, and with reCAPTCHA to ensure that the applicants are humans, not bots. OmniScripts such as Primary Source Verification and Provider Recruitment now use standard fields.

### IN THIS SECTION:

#### [Use Provider Network Management in an App](#)

Enable payers to seamlessly complete the provider management processes of recruiting, credentialing, and contracting by using the new Provider Network Management app within Health Cloud.

#### [Use DocuSign to Collect Provider Signature on Applications](#)

Payers can obtain e-signatures on the applications of providers by integrating Provider Network Management with DocuSign.

#### [Enhance Security with reCAPTCHA](#)

With the new reCAPTCHA in the Provider registration form, your users can ensure that the forms are filled by humans, not a bot.

## Use Provider Network Management in an App

Enable payers to seamlessly complete the provider management processes of recruiting, credentialing, and contracting by using the new Provider Network Management app within Health Cloud.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions of Health Cloud with the Health Cloud Provider Network Management Add-On license.

**Who:** This app is available to users with the Health Cloud Provider Network Management and CLM Runtime User permission sets.

**How:** To use the app, in the App Launcher, find and select **Provider Network Management**.

## Use DocuSign to Collect Provider Signature on Applications

Payers can obtain e-signatures on the applications of providers by integrating Provider Network Management with DocuSign.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions of Health Cloud with the Health Cloud Provider Network Management Add-On license.

**Who:** This feature is available to users with the Health Cloud Provider Network Management and CLM Runtime User permission sets.

**How:** Create an Apex-defined integration definition, and create a connected app by using the existing `auth_provider_callback` URL.

## Enhance Security with reCAPTCHA

With the new reCAPTCHA in the Provider registration form, your users can ensure that the forms are filled by humans, not a bot.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions of Health Cloud with the Health Cloud Provider Network Management Add-On license.

**Who:** This feature is available to the guest users of the payer's experience sites.

**How:** On the provider registration page in the payer's experience sites, select **reCAPTCHA**.

## Provider Search Enhancements

Scan relevant details more easily in search result cards with dynamic layouts. Get more accurate search results by matching text and text area field values to specific fields. Refine the Provider Search experience by customizing which data is synchronized and searchable. Ensure a smoother Provider Search implementation by getting step-by-step assistance in an expanded guided setup experience for administrators.

### IN THIS SECTION:

#### [View More Relevant Details in Search Result Cards](#)

Provider search results shown as cards now show fields specific to either practitioners or facilities. Cards for facilities no longer show practitioner fields related to education levels, training, medical licenses, board certifications, and hospital affiliations. It's easier and faster to scan search results without these extraneous details.

#### [Improve Provider Search Results with Precise Matching](#)

Improve the accuracy of search results when users search by values in a text field or a text area field that accepts multiple values. Provider Search finds records with matching values in the specified text or text area field, as opposed to matching values in any field.

#### [Get More Control Over Provider Search Data](#)

Instead of using the standard Provider Search Data Processing Engine (DPE) definition to populate Care Provider Searchable Field records, you can now configure a custom DPE definition tailored to your business needs. For example, you can build a DPE definition that generates searchable data only for healthcare facilities, not healthcare practitioners. Your custom DPE definition can sync data to Care Provider Searchable Field records or to custom searchable object records.

#### [Get Enhanced Guidance to Set Up Provider Search](#)

The updated guided setup walks you through setting up facilities and practitioners, configuring Criteria-Based Search and Filter, and enabling optional features. From start to finish, guided setup leads you through each step with clear, simple directions, and links to contextual Help pages.

## View More Relevant Details in Search Result Cards

Provider search results shown as cards now show fields specific to either practitioners or facilities. Cards for facilities no longer show practitioner fields related to education levels, training, medical licenses, board certifications, and hospital affiliations. It's easier and faster to scan search results without these extraneous details.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions with Health Cloud.

**Who:** Users with the Criteria-Based Search and Filter system permission can configure and use criteria-based search and filter capabilities. To select or configure an OmniStudio FlexCard for the card view, users need the OmniStudio Admin permission set.

**How:** Add a search configuration that shows search results as cards. From Setup, in the Quick Find box, enter *Criteria*, and then select **Criteria-Based Search and Filter**. On the Search Configuration tab, click **New**. When you configure the display format of search results, select **Card**, and then select an OmniStudio FlexCard.

### SEE ALSO:

[Salesforce Help: Configure Provider Search with Criteria-Based Search and Filter \(can be outdated or unavailable during release preview\)](#)

## Improve Provider Search Results with Precise Matching

Improve the accuracy of search results when users search by values in a text field or a text area field that accepts multiple values. Provider Search finds records with matching values in the specified text or text area field, as opposed to matching values in any field.

**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 Provider Search permission set or Health Cloud Provider Relationship Management permission set.

**Why:** Provider Search matches search terms to values in multiple fields. For example, a search for Diabetes in the Specialty field returns providers with Diabetes in the Specialty field as well as providers with Diabetes in a custom field. With Provider Search Precise Matching enabled, search results show only the providers with Diabetes in the Specialty field.

**How:** From Setup, in the Quick Find box, enter *Provider Search*, and then select **Provider Search Settings**. On the Getting Started tab, turn on Provider Search Precise Matching.



**Note:** The Provider Search Precise Matching setting doesn't apply to searches run in the Criteria-Based Search and Filter component.

SEE ALSO:

[Salesforce Help: Compare Provider Search Features \(can be outdated or unavailable during release preview\)](#)

## Get More Control Over Provider Search Data

Instead of using the standard Provider Search Data Processing Engine (DPE) definition to populate Care Provider Searchable Field records, you can now configure a custom DPE definition tailored to your business needs. For example, you can build a DPE definition that generates searchable data only for healthcare facilities, not healthcare practitioners. Your custom DPE definition can sync data to Care Provider Searchable Field records or to custom searchable object records.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions with Health Cloud.

**Who:** Provider Search is available to users with the Health Cloud Provider Search permission set or Health Cloud Provider Relationship Management permission set. To use Data Processing Engine, users need the Data Pipelines Base User permission. To edit a custom Data Processing Engine definition for Provider Search, users need the Healthcare Provider Search Fields Access permission set.

**How:** From Setup, in the Quick Find box, enter *Provider Search*, and then select **Provider Search Settings**. Click the Custom Data Processing Engine Definition tab. To clone the standard Provider Search definition, click **Generate DPE Definition**. Then edit the cloned version to create a custom DPE definition.

To test your custom DPE definition, turn off Standard Provider Search Data Sync and turn on DPE Transaction Observer.



**Important:** We recommend that you edit and test your custom DPE definition in a sandbox environment.

SEE ALSO:

[Salesforce Help: Control Provider Search Data with Custom Data Transformations \(can be outdated or unavailable during release preview\)](#)

## Get Enhanced Guidance to Set Up Provider Search

The updated guided setup walks you through setting up facilities and practitioners, configuring Criteria-Based Search and Filter, and enabling optional features. From start to finish, guided setup leads you through each step with clear, simple directions, and links to contextual Help 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 Health Cloud Provider Search permission set or Health Cloud Provider Relationship Management permission set.

**How:** From Setup, in the Quick Find box, enter *Provider Search*, and then select **Provider Search Settings**. Enable Standard Provider Search Data Sync. On each tab, enable the features you want to use and follow the guided setup steps.

SEE ALSO:

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

## Optimize Patient Care by Using Segmentation Insights

Gain comprehensive insights into patient demographics, risk scores, and health conditions by using the new Patient Segmentation dashboard. Identify high-risk patients and assess their priorities. Strategically allocate resources to enhance patient care and optimize resource utilization.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions with Health Cloud.

**Who:** The dashboard is a part of the Enhanced Analytics for Healthcare app and is 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 the Enhanced Analytics for Healthcare app.

## Health Cloud Console

Health Cloud has a new console app.

IN THIS SECTION:

[View Events, Tasks, and More with the Health Cloud Console App](#)

Your users can now stay up to date with their activities using the new Health Cloud Console app. The app's home page shows users all tasks assigned to them, tasks that are due for the day, events that they're part of for the day, recently accessed records, and a feed of their chatter activity. You can also customize this app to better suit the needs of your organization and users.

### View Events, Tasks, and More with the Health Cloud Console App

Your users can now stay up to date with their activities using the new Health Cloud Console app. The app's home page shows users all tasks assigned to them, tasks that are due for the day, events that they're part of for the day, recently accessed records, and a feed of their chatter activity. You can also customize this app to better suit the needs of your organization and users.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions with Health Cloud.

**How:** From Setup, in the Quick Find box, enter *Health Cloud Settings*, and then select **Health Cloud Settings**. Enable the **Health Cloud Console** setting.

## Health Cloud Managed Package

We've made changes to how Health Cloud uses the Health Cloud Managed Package.



## IN THIS SECTION:

### [End of Distribution for the Health Cloud Managed Package](#)

Health Cloud doesn't require customers to install the Health Cloud managed package as all relevant features now have counterparts in the core Salesforce platform. Therefore, new customers onboarding into Health Cloud starting with the Summer '24 release no longer have access to the Health Cloud managed package. Customers who have onboarded before the Summer '24 release can continue to use the managed package, but we recommend evaluating the relevant features in the core Salesforce platform.

### [Use Standard Relationship Objects in More Health Cloud Features](#)

You can now use Intelligent Appointment Management and the Patient API without using the relationship objects in the Health Cloud managed package. After the corresponding setting is enabled, these features start using `AccountAccountRelation`, `AccountContactRelation`, and `ContactContactRelation` instead.

## End of Distribution for the Health Cloud Managed Package

Health Cloud doesn't require customers to install the Health Cloud managed package as all relevant features now have counterparts in the core Salesforce platform. Therefore, new customers onboarding into Health Cloud starting with the Summer '24 release no longer have access to the Health Cloud managed package. Customers who have onboarded before the Summer '24 release can continue to use the managed package, but we recommend evaluating the relevant features in the core Salesforce platform.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions with Health Cloud.

## Use Standard Relationship Objects in More Health Cloud Features

You can now use Intelligent Appointment Management and the Patient API without using the relationship objects in the Health Cloud managed package. After the corresponding setting is enabled, these features start using `AccountAccountRelation`, `AccountContactRelation`, and `ContactContactRelation` instead.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions with Health Cloud.

**How:** From Setup, in the Quick Find box, enter *Health Cloud Settings*, and then select **Health Cloud Settings**. Enable the **Standard Objects for Account and Contact Relations** setting.

## Health Cloud Admin Guide

Find the Health Cloud Admin Guide in Salesforce Help.

## IN THIS SECTION:

### [Find the Single Source of Truth for the Health Cloud Admin Guide](#)

There's now a single source of truth for the Health Cloud Admin Guide in Salesforce Help. Previously, the guide was available on both the Salesforce help site and [developer.salesforce.com/docs](https://developer.salesforce.com/docs).

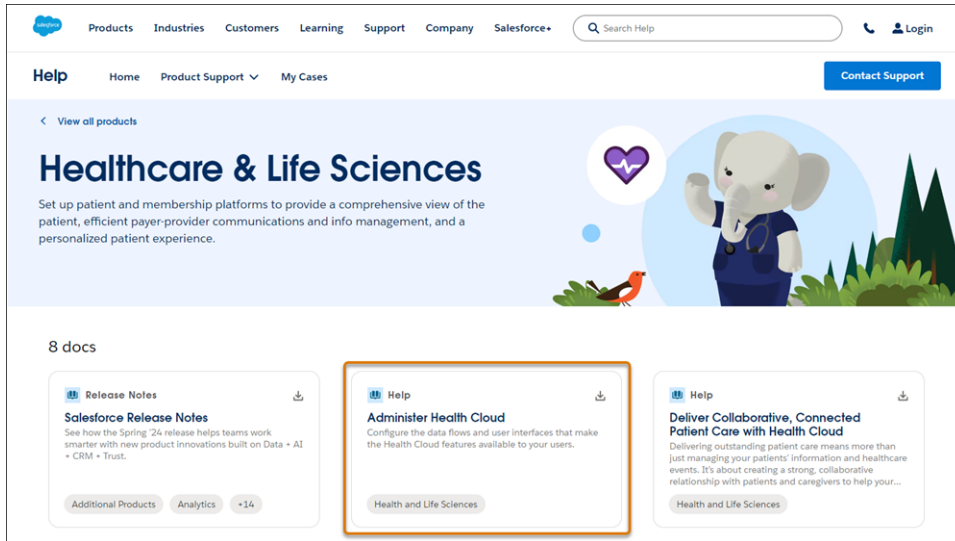
## Find the Single Source of Truth for the Health Cloud Admin Guide

There's now a single source of truth for the Health Cloud Admin Guide in Salesforce Help. Previously, the guide was available on both the Salesforce help site and [developer.salesforce.com/docs](https://developer.salesforce.com/docs).

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

**Why:** We wanted to provide a single location for you to access the guide.

**How:** Navigate to Salesforce Help ([help.salesforce.com](https://help.salesforce.com)) and click **View all products**. Then click the product tile for Health Cloud and look for *Administer Health Cloud*.



SEE ALSO:

[Salesforce Help: Administer Health Cloud](#)

## Health Cloud Has New and Changed Objects

Store and access more data with these new and changed Health Cloud objects.

### Advanced Therapy Management

#### Specify the status code for scheduling a service appointment group

Use the new `StatusCode` field in the `ServiceAppointmentGroup` object.

#### Specify the ID of the work procedure that's associated with a service appointment group

Use the new `WorkProcedureId` field in the `ServiceAppointmentGroup` object.

#### Indicate whether a work procedure is active or not

Use the new `IsActive` field in the `WorkProcedure` object.

#### Calculate the lead time for a work procedure in minutes

Use the new `Minutes` picklist value in the `LeadTimeUnitType` field in the `WorkProcedure` object.

#### Represent the unit of measure used to calculate the lead time for a work procedure step

Use the new `LeadTimeUnitType` field in the `WorkProcedureStep` object.

### Assessment Generation

#### Represent assessment questions and their source document

Use the new `AssessmentQuestionSourceDoc` object.

#### Specify the ID of the assessment question source document that's associated with the assessment question version

Use the new `AssessmentQuestionSourceDocId` field in the `AssessmentQuestionVersion` object.

#### Specify how the assessment question is created from the source document

Use the new `QuestionCreationType` field in the `AssessmentQuestionVersion` object.

## Integrated Care Management

**Represent additional information about a healthcare-related task such as process status, beneficiary, and related tasks.**

Use the new `CareTask` object.

**Represent extra details about a healthcare-related task such as the detail type, detail record, detail code, and detail value.**

Use the new `CareTaskDetail` object.

## Home Health

**Represent the schedule preference that a party has for their appointment**

Use the new `PartySchedulePreference` object.

**Represent an appointment request for a party**

Use the new `PartyAppointmentRequest` object.

**Represent the order of the preference selected by a patient**

Use the new `PreferenceOrder` field in the `AccountServicePreference` object.

## Medication Management and Medication Review

**Associate an author note to a clinical encounter.**

Use the updated `ParentRecordId` field in the `AuthorNote` object.

## Patient Segmentation

**Store risk adjustment factors for Hierarchical Condition Category (HCC) Codes**

Use the new `HierCondHlthRskAdjFctr` object.

**Store risk adjustment factors for a set of interacting conditions**

Use the new `CondIntrctnHlthRskAdjFctr` object.

**Store risk adjustment factors for different age bands**

Use the new `AgeBandHlthRskAdjFctr` object.

**Store risk adjustment factors based on program eligibility**

Use the new `PgmBasedHlthRskAdjFctr` object.

**Map a condition code to a hierarchical condition category (HCC) code**

Use the new `HierCondHlthCodeMapping` object.

**Indicate the status of a patient's risk factors**

Use the new `PartyProfile` object.

**Specify a patient or member's benefit coverage type**

Use the new `BenefitCoverageType` field on the existing `CareProgramEnrollee` object.

**Specify a patient or member's enrollment status type**

Use the new `EnrolleeType` field on the existing `CareProgramEnrollee` object.

**Specify a patient or member's age at the time a risk score was calculated**

Use the new `Age` field on the existing `HealthScore` object.

**Specify the age band a patient or member was a part of at the time a risk score was calculated**

Use the new `AgeBand` field on the existing `HealthScore` object.

**Store a list of condition categories that applied to patient or member at the time a risk score was calculated**

Use the new `ConditionCategoryList` field on the existing `HealthScore` object.

**Indicate a patient or member's disability status at the time a risk score was calculated**

Use the new `IsSubjectDisabled` field on the existing `HealthScore` object.

**Indicate a patient or member's gender at the time a risk score was calculated**

Use the new `Gender` field on the existing `HealthScore` object.

**Store a list of hierarchical condition category (HCC) codes that applied to patient or member at the time a risk score was calculated**

Use the new `HierCondCategoryCodeList` field on the existing `HealthScore` object.

**Indicate that the patient or member was institutionalized at the time a risk score was calculated**

Use the new `IsSubjectInstitutionalized` field on the existing `HealthScore` object.

**Specify the number of condition categories that applied to a patient at the time a risk score was calculated**

Use the new `ConditionCategoryCount` field on the existing `HealthScore` object.

**Specify a patient or member for whom a risk score was calculated**

Use the new `CareProgramEnrollee` field on the existing `HealthScore` object.

**Specify the year when a risk score was calculated for a patient or member**

Use the new `AssessmentYear` field on the existing `HealthScore` object.

## Provider Network Management

**Store the date of birth of the provider**

Use the new `BirthDate` field in the `Lead` object.

**Store the specialty of the provider**

Use the new `Specialty` field in the `Lead` object.

**SEE ALSO:**

[Salesforce Health Cloud Developer Guide: ServiceAppointmentGroup](#) (can be outdated or unavailable during release preview)

[Salesforce Health Cloud Developer Guide: WorkProcedure](#) (can be outdated or unavailable during release preview)

[Salesforce Health Cloud Developer Guide: WorkProcedureStep](#) (can be outdated or unavailable during release preview)

## 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.

### Bulk Claims Data Ingestion into Data Cloud

Retrieve Medicare Part A, B, and D claims data for the attributed patients.

### C-CDA Document Extraction and Ingestion into Data Cloud

Extract patient data from the CCDA documents and transform it into Fast Healthcare Interoperability Resources (FHIR) bundles for ingestion into Salesforce Data Cloud.

### 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

### Find available slots and manage quotas for therapies at various stages across multiple treatment centers

Make a POST request to the new

```
/connect/health/advanced-therapy-management/quotas-and-allocations
```

resource.

New request body: Quotas Allocation Input

New response body: Quotas Allocation Output

SEE ALSO:

[Salesforce Health Cloud Developer Guide: Quotas And Allocations](#)

## New and Changed Invocable Actions in Health Cloud

Use the new and changed invocable actions for Health Cloud.

### Recommend resources to use when you manually schedule a start of care visit or recurring visits

Use the new `getResourcesForMnlScheduling` action.

### Create home visits and assign care resources that are manually selected by the scheduler

Use the new `scheduleHomeVisitsManually` action.

### Recommend resources to use when manually scheduling a start of care visit or recurring home visits

Use the new `getResourcesforMnlScheduling` action.

### Create a group visit and set the address for the visit

Use the new `groupVisitAddress` and `clinicalServiceRequestIds` input fields on the existing `scheduleGroupVisits` action.

SEE ALSO:

[Salesforce Health Cloud Developer Guide: Get Resources for Manual Scheduling Action](#)

## New Metadata Types in Health Cloud

Learn more about the new metadata types in Health Cloud.

## Salesforce Flow

### Recommend resources for manual scheduling

Use the new `getResourcesForMnlScheduling` value in the existing `actionType` field, which is on the `FlowActionCall` subtype of the Flow metadata type.

### Schedule home visits manually

Use the new `scheduleHomeVisitsManually` value in the existing `actionType` field, which is on the `FlowActionCall` subtype of the Flow metadata type.

## 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 Summer '24.

### SEE ALSO:

[Salesforce Help: Insurance Summer '24 Release Notes \(can be outdated or unavailable during release preview\)](#)

## Life Sciences Cloud (Generally Available)

Life Sciences Cloud is a new end-to-end product built on the Salesforce platform for organizations engaged in the Life Sciences industry. Inheriting a robust pool of features from other Salesforce Industries products, like Health Cloud, and adding its own brand-new set of features, Life Sciences Cloud helps organizations optimize their operations in the clinical, medical, and commercial domains. Life Sciences Cloud is available, starting June 2024.

### IN THIS SECTION:

#### [Participant Management](#)

Reduce the time it takes to discover clinical trials by adding the Criteria-Based Search and Filter to your Experience Cloud site. Quickly identify participants meeting clinical trial criteria and streamline the application process for eligible participants by using built-in Omnistudio components. Eliminate complex paper-based processes with a structured digital approach to capture participant consent.

#### [Patient Program Outcome Management \(Pilot\)](#)

Use Patient Program Outcome Management to optimize program effectiveness, track patients' progress in a program, and measure program outcomes. Improve patient experience and adherence with tailored assessments, store calculated response scores, and assess outcomes to optimize patient service programs. Provide insights to improve case manager efficacy, identify programs that deviate from expected outcomes, and enable preventive actions.

#### [Pharmacy Benefits Verification](#)

Prioritize getting patients on their prescribed medications faster. A clear and guided process empowers agents to quickly gain a comprehensive understanding of the coverage details of a patient's pharmacy benefits, including coverage status, co-pay, and co-insurance. Agents can also generate a summary of medication benefits within a care program, and easily share the benefits package with patients, fostering informed decisions about their treatment plans.

#### [Life Sciences Cloud Has New Objects](#)

Store and access more data with these new Life Sciences Cloud objects.

#### [New Invocable Actions in Life Sciences Cloud](#)

Use the new invocable actions in Participant Management to set up the randomization process for generating research study block records and assigning candidates to research study comparison groups.

#### [New Metadata Types in Life Sciences Cloud](#)

Participant Management includes these new metadata types to generate research study randomization blocks and to randomly assign candidates to research study comparison groups.

### SEE ALSO:

[Salesforce Help: Life Sciences Cloud](#)

## Participant Management

Reduce the time it takes to discover clinical trials by adding the Criteria-Based Search and Filter to your Experience Cloud site. Quickly identify participants meeting clinical trial criteria and streamline the application process for eligible participants by using built-in Omnistudio components. Eliminate complex paper-based processes with a structured digital approach to capture participant consent.

### IN THIS SECTION:

#### [Discover Clinical Trials Easily with Criteria-Based Search and Filter](#)

Reduce the time it takes candidates to discover clinical trials by adding the Criteria-Based Search and Filter to your Experience Cloud site. With Criteria-Based Search and Filter, you can customize a unified searchable field that helps users easily search for and find clinical trials based on conditions, keywords, or the name of the disease. You can provide sorting options for search results displayed as cards so that it's easy for participants to navigate through matching trials. You can also set up trial search targeting options based on their location to help participants find more suitable trials effectively.

#### [Evaluate Participant Eligibility With Prescreening Assessments](#)

Accelerate research study timelines by swiftly identifying participants who meet the eligibility criteria for clinical trials. You can configure the built-in Omnistudio components to enable prescreening assessments for participants to quickly determine their eligibility by responding to a few predefined questions. Make these assessments available on your Experience Cloud site. You can also encourage non-eligible candidates to share contact information for future trials.

#### [Simplify Application Process With Built-in Templates](#)

Enhance participant engagement and provide a seamless application process for participants who cleared the prescreening eligibility. You can configure the built-in Omnistudio components to capture essential participant details, which allows for direct and self-paced application without intermediaries.

#### [Capture Informed Participant Consents with Flows](#)

Eliminate complex paper-based processes using a structured digital approach to capture candidate consent. Customize the consent management process to meet your business needs and ensure it supports multiple languages and complies with all regulatory standards. This feature helps clinical trial managers by streamlining the handling of consent versions and simplifying the process of capturing timestamps for easier regulatory reporting. It also supports both scribble signatures and signatures via user login credentials.

## Discover Clinical Trials Easily with Criteria-Based Search and Filter

Reduce the time it takes candidates to discover clinical trials by adding the Criteria-Based Search and Filter to your Experience Cloud site. With Criteria-Based Search and Filter, you can customize a unified searchable field that helps users easily search for and find clinical trials based on conditions, keywords, or the name of the disease. You can provide sorting options for search results displayed as cards so that it's easy for participants to navigate through matching trials. You can also set up trial search targeting options based on their location to help participants find more suitable trials effectively.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions with Life Sciences Cloud and Participant Enrollment Add-On license.

**When:** Participant Management is available starting in June 2024.

**Who:** This feature is available to users with the Criteria-Based Search and Filter permission set license.

**How:** From Setup, find *Criteria-Based Search and Filter*, and turn on Criteria-Based Search and Filter. Next, go to the Data Pipelines setup page and turn on data pipelines. Then, clone and activate the Research Study Searchable Field DPE definition. In a new or existing Experience Cloud site, create a standard page for searching, add it as a menu item, and make the page publicly available.

SEE ALSO:

- [Salesforce Help: Configure Data Processing Engine for Trial Search](#)
- [Salesforce Help: Create Searchable Object Configuration for Trial Search](#)
- [Salesforce Help: Create Search Configuration for Trial Search](#)
- [Salesforce Help: Set Up Experience Cloud Site for Participant Management](#)
- [Salesforce Help: Create Guest Users Sharing Rules in Participant Management](#)

## Evaluate Participant Eligibility With Prescreening Assessments

Accelerate research study timelines by swiftly identifying participants who meet the eligibility criteria for clinical trials. You can configure the built-in Omnistudio components to enable prescreening assessments for participants to quickly determine their eligibility by responding to a few predefined questions. Make these assessments available on your Experience Cloud site. You can also encourage non-eligible candidates to share contact information for future trials.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions with Life Sciences Cloud and Participant Enrollment Add-On license.

**When:** Participant Management is available starting in June 2024.

**Who:** This feature is available to users with Health Cloud Starter, Omnistudio admin, and Omnistudio User permission set licenses.

**How:** From Setup, find *Prefill Assessment Question Settings*, turn on **Prefill Assessment Questions**, and then create assessment question records. To activate candidate eligibility, create a version of the built-in Omniscrypt and add it to the care program details record. Next, create a version of the built-in integration procedure. In the business rules engine settings, create and configure an expression set. Next, create a version of the built-in integration procedure for eligibility results and add the expression set you created to this integration procedure. Finally, add these components to your experience cloud site.

SEE ALSO:

- [Salesforce Help: Set Up Experience Cloud Site for Participant Management](#)
- [Salesforce Help: Set Up Pre-Screenings Assessments](#)
- [Salesforce Help: Clone and Activate Candidate Eligibility Omniscrypt](#)
- [Salesforce Help: Clone Integration Procedures for Pre-Screening Assessments](#)
- [Salesforce Help: Create and Configure an Expression Set for Pre-Screening Assessments](#)

## Simplify Application Process With Built-in Templates

Enhance participant engagement and provide a seamless application process for participants who cleared the prescreening eligibility. You can configure the built-in Omnistudio components to capture essential participant details, which allows for direct and self-paced application without intermediaries.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions with Life Sciences Cloud and Participant Enrollment Add-On license.

**When:** Participant Management is available starting in June 2024.

**Who:** This feature is available to users with the Health Cloud Starter, OmniStudio Admin and OmniStudio User permission set licenses.



**How:** From App Launcher, find and select authorization form text to create records. Next, set up person accounts. Create a new version of the built-in candidate registration Omniscrypt, and add the authorization form text ID and person account record ID to the Omniscrypt. Then, set up reCAPTCHA. From Setup, go to web-to-case-HTML-Generator, and enter the API key pair you got when registering the site. Add the reCAPTCHA details to the Omniscrypt and experience cloud site.

## Capture Informed Participant Consents with Flows

Eliminate complex paper-based processes using a structured digital approach to capture candidate consent. Customize the consent management process to meet your business needs and ensure it supports multiple languages and complies with all regulatory standards. This feature helps clinical trial managers by streamlining the handling of consent versions and simplifying the process of capturing timestamps for easier regulatory reporting. It also supports both scribble signatures and signatures via user login credentials.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions with Life Sciences Cloud and Participant Enrollment Add-On license.


**When:** Participant Management is available starting in June 2024.

**Who:** This feature is available to users with Clinical Trial Manager permission set license.

**How:** From Setup, find and select participant management settings, and turn on **Participant Enrollment** and **Custom Sharing**. Enable Named Credentials. From Setup, find and select flows, and then clone and activate the built-in flow.

## Patient Program Outcome Management (Pilot)

Use Patient Program Outcome Management to optimize program effectiveness, track patients' progress in a program, and measure program outcomes. Improve patient experience and adherence with tailored assessments, store calculated response scores, and assess outcomes to optimize patient service programs. Provide insights to improve case manager efficacy, identify programs that deviate from expected outcomes, and enable preventive actions.

 **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.

### IN THIS SECTION:

#### [Store Outcome Data in the Patient Program Outcome Management Data Model \(Pilot\)](#)

With Patient Program Outcome Management, you can define program outcomes and indicators, and link program outcomes and patient progress with the ability to measure at the outcomes level. This data is stored in the Patient Program Outcome Management data model, which in turn is based on the Outcome Management data model. Patient Program Outcome Management also leverages the Discovery Framework data model to support assessments.

#### [Calculate Outcome Metrics Using Salesforce Flows \(Pilot\)](#)

You can create Salesforce flows with your own outcome calculation algorithms to store results in the Patient Program Outcome Management data model. Once you create a compatible flow and add it to a record in Indicator Definition, the Calculate Indicator Result button appears on Indicator Performance Period records.


### SEE ALSO:

[Salesforce Help: Patient Program Outcome Management](#)

## Store Outcome Data in the Patient Program Outcome Management Data Model (Pilot)

With Patient Program Outcome Management, you can define program outcomes and indicators, and link program outcomes and patient progress with the ability to measure at the outcomes level. This data is stored in the Patient Program Outcome Management data model, which in turn is based on the Outcome Management data model. Patient Program Outcome Management also leverages the Discovery Framework data model to support assessments.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions with Life Sciences Cloud or Health Cloud license.

 **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:** Patient Program Outcome Management is available starting in June 2024.

**Who:** This feature is available to users with the Health Cloud Starter (for Life Sciences Cloud) or Health Cloud Foundation (for Health Cloud), and Patient Program Outcome Management permission set.


SEE ALSO:

[Salesforce Help: Patient Program Outcome Management Data Model and Permissions](#)

## Calculate Outcome Metrics Using Salesforce Flows (Pilot)

You can create Salesforce flows with your own outcome calculation algorithms to store results in the Patient Program Outcome Management data model. Once you create a compatible flow and add it to a record in Indicator Definition, the Calculate Indicator Result button appears on Indicator Performance Period records.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions with Life Sciences Cloud or Health Cloud license.

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**When:** Patient Program Outcome Management is available starting in June 2024.

**Who:** This feature is available to users with the Health Cloud Starter (for Life Sciences Cloud) or Health Cloud Foundation (for Health Cloud), and Patient Program Outcome Management permission set.

**How:** Create a flow with the process type Indicator Result Flow and associate it with an Indicator Definition record. After the flow is added to an indicator definition, the Calculate Indicator Result button appears on Indicator Performance Period records associated with that indicator definition. Click this button to launch the flow that you created.

SEE ALSO:

[Salesforce Help: Indicator Result Calculation Flow](#)

## Pharmacy Benefits Verification

Prioritize getting patients on their prescribed medications faster. A clear and guided process empowers agents to quickly gain a comprehensive understanding of the coverage details of a patient's pharmacy benefits, including coverage status, co-pay, and co-insurance. Agents can also generate a summary of medication benefits within a care program, and easily share the benefits package with patients, fostering informed decisions about their treatment plans.

### IN THIS SECTION:

#### [View a Comprehensive Summary of Patient's Member Plans](#)

View details of a patient's associated member plans at a glance. Use these plans to verify the pharmacy benefits of a patient for the prescribed drug.

#### [Raise Verification Requests for Pharmacy Benefits](#)

Pharmacy agents can initiate a pharmacy benefits verification request for a patient against a member plan from the PharmacyBenefitsVerification flexcard on the care program enrollee record page. Agents can click the Verify Manually button on this flexcard to initiate the omniscrypt that creates the verification request. This request includes information about the patient, prescriber, prescribed drug, and preferred pharmacy.

#### [Record Responses from Payers](#)

Agents can use the PharmacyBenefitsVerification FlexCard to record the responses they get from payers about the verification requests they raise for their patients. Agents can then use these responses to generate comprehensive reports that they can share with patients or providers to make informed decisions.

### SEE ALSO:

[Salesforce Help: Pharmacy Benefits Verification](#)

## View a Comprehensive Summary of Patient's Member Plans

View details of a patient's associated member plans at a glance. Use these plans to verify the pharmacy benefits of a patient for the prescribed drug.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions with Life Sciences Cloud or Health Cloud license.

**When:** Pharmacy Benefits Verification is available starting in June 2024.

**Who:** This feature is available to users with the Health Cloud Starter (for Life Sciences Cloud) or Health Cloud Foundation (for Health Cloud), and Manage Pharmacy Benefits Verification permission set.

**How:** Add the PharmacyBenefitsVerification flexcard to the Care Program Enrollee record page.

### SEE ALSO:

[Salesforce Help: Pharmacy Benefits Verification Request](#)

## Raise Verification Requests for Pharmacy Benefits

Pharmacy agents can initiate a pharmacy benefits verification request for a patient against a member plan from the PharmacyBenefitsVerification flexcard on the care program enrollee record page. Agents can click the Verify Manually button on this flexcard to initiate the omniscrypt that creates the verification request. This request includes information about the patient, prescriber, prescribed drug, and preferred pharmacy.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions with Life Sciences Cloud or Health Cloud license.

**When:** Pharmacy Benefits Verification is available starting in June 2024.

**Who:** This feature is available to users with the Health Cloud Starter (for Life Sciences Cloud) or Health Cloud Foundation (for Health Cloud), and Manage Pharmacy Benefits Verification permission set.

**How:** Add the `PharmacyBenefitsVerification` flexcard to the Care Program Enrollee record page.

SEE ALSO:

[Salesforce Help: Initiate a Verification Request](#)

## Record Responses from Payers

Agents can use the PharmacyBenefitsVerification FlexCard to record the responses they get from payers about the verification requests they raise for their patients. Agents can then use these responses to generate comprehensive reports that they can share with patients or providers to make informed decisions.

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**When:** Pharmacy Benefits Verification is available starting in June 2024.

**Who:** This feature is available to users with the Health Cloud Starter (for Life Sciences Cloud) or Health Cloud Foundation (for Health Cloud), and Manage Pharmacy Benefits Verification permission set.

**How:** Add the `PharmacyBenefitsVerification` flexcard to the Care Program Enrollee record page.

SEE ALSO:

[Salesforce Help: Benefit Coverage Response](#)

## Life Sciences Cloud Has New Objects

Store and access more data with these new Life Sciences Cloud objects.

### Participant Management

#### Represent the details of a research study that includes its design, execution, and oversight

Use the new `ResearchStudy` object.

#### Represent the details of the research participant, which includes the associated account and the status of the subject

Use the new `ResearchStudyCandidate` object.

#### Represent the time duration during which a research study candidate is assigned a specific status

Use the new `ResearchStdyCndtStatusPrd` object.

#### Represent different related research studies

Use the new `ResearchStudyRelation` object.

#### Represent a common dataset that includes multiple fields and values from multiple objects and serves as the basis for searches related to research studies

Use the new `ResearchStdySearchableField` object.

#### Represent the randomization algorithm configuration defined for a research study

Use the new `ResearchStdyRandomization` object.

**Represent the details of a block that's generated through the parameters specified in the research study randomization**

Use the new `RsrchStdyRandomizationBlock` object.

**Represent the details of a block that's generated through the parameters specified in the research study randomization**

Use the new `ResearchStudyRndmBlockSlot` object.

**Represent the criteria definition for grouping the candidates participating in the research study**

Use the new `RsrchStdyRandomizationCrit` object.

**Represent the details of a research study comparison group**

Use the new `ResearchStudyCmprGroup` object.

**Represent the junction between a research study control group and a research study candidate**

Use the new `ResearchStdyCmprGroupCndt` object.

## Care Program Management

**Specify the status code for scheduling a service appointment group**

Use the new `CurrentEnrolleeCount` field in the `CareProgram` object.

**Specify the target enrollee count of the care program**

Use the new `TargetEnrolleeCount` field in the `CareProgram` object.

**Specify the type of the eligibility Rule**

Use the new `Type` field in the `CareProgramEligibilityRule` object.

**Specify the coverage status of the enrollee under both Medicare and Medicaid**

Use the new `BenefitCoverageType` field in the `CareProgramEnrollee` object.

**Specify whether the enrollee is a new enrollee or a continued enrollee**

Use the new `EnrolleeType` field in the `CareProgramEnrollee` object.

**Specify whether the enrollee is a new enrollee or a continued enrollee**

Use the new `EnrolleeType` field in the `CareProgramEnrollee` object.

**Specify the group that's recommended to the enrollee**

Use the new `RecommendedGroup` field in the `CareProgramEnrollee` object.

**Specify the group that the enrollee is part of**

Use the new `CurrentGroup` field in the `CareProgramEnrollee` object.

**Specify the related research study candidate record of the care program enrollee**

Use the new `ResearchStudyCandidate` field in the `CareProgramEnrollee` object.

**Represent the historical changes to the status of a care program**

Use the new `CareProgramStatusPeriod` object.

**Represent the details about the care program site**

Use the new `CareProgramSite` object.

**Represent the detail records related to the care program**

Use the new `CareProgramDetail` object.

**Specify the category that the member belongs to**

Use the new `Category` field in the `CareProgramTeamMember` object.

**Specify the team member associated with the care program team member**

Use the new `Member` field in the `CareProgramTeamMember` object.

**Represent the historical changes in the role of a care program team member**

Use the new `CarePgmTeamMbrRolePeriod` object.

**Represent the historical changes to the status or stage of a care program enrollee**

Use the new `CarePgmEnrleeStatusPeriod` object.

**Specify the process that's executed to check for eligibility**

Use the new `ExecutionProcedure` field in the `EnrollmentEligibilityCriteria` object.

**Specify the name of the organization or person who has published the eligibility criteria**

Use the new `PublishedBy` field in the `EnrollmentEligibilityCriteria` object.

## Electronic Signatures

**Specify the user or user group who can provide verification for a parent reference record**

Use the new `DesignatedVerifier` field in the `DigitalVerification` object.

**Specify the status category of the verification for the parent reference record**

Use the new `VerificationStatusCategory` field in the `DigitalVerification` object.

**Specify the status of verification for the parent reference record**

Use the new `VerificationStatus` field in the `DigitalVerification` object.

**Specify the message that is displayed before a verification is performed**

Use the new `PreVerificationMessage` field in the `DigitalVerification` object.

**Specify the message that is displayed after a verification is performed**

Use the new `PostVerificationMessage` field in the `DigitalVerification` object.

**Specify the requested date for this digital verification record**

Use the new `VerificationRequestDateTime` field in the `DigitalVerification` object.

## Adverse Events

**Represent the event related to unintended/anticipated effects on research participants**

Use the new `AdverseEventEntry` object.

**Represent who or what participated in the adverse event and how they were involved**

Use the new `AdverseEventParty` object.

**Represent the entity that is suspected to have caused the adverse event**

Use the new `AdverseEventCause` object.

**Represent the contributing factors suspected to have increased the probability or severity of the adverse event**

Use the new `AdverseEventContributingFactor` object.

**Represent supporting information relevant to the event**

Use the new `AdverseEventSupportingInformation` object.

**Represent preventive actions that contributed to avoiding the adverse event or ameliorating actions taken after the adverse event occurred in order to reduce the extent of harm**

Use the new `AdverseEventResultingEffect` object.

**Represent the type of outcome from the adverse event**

Use the new `AdverseEventOutcome` object.

## New Invocable Actions in Life Sciences Cloud

Use the new invocable actions in Participant Management to set up the randomization process for generating research study block records and assigning candidates to research study comparison groups.

**Generate research study randomization block records**

Use the `generateResearchStudyBlocks` action.

**Randomly assign candidates to research study comparison groups**

Use the `assignCndtToResearchStudyGroup` action.

SEE ALSO:

[Life Sciences Cloud Developer Guide: Life Sciences Cloud Invocable Actions](#)

## New Metadata Types in Life Sciences Cloud

Participant Management includes these new metadata types to generate research study randomization blocks and to randomly assign candidates to research study comparison groups.

### Salesforce Flow

**Generate research study randomization block records**

Use the `generateResearchStudyBlocks` value in the existing `actionType` field, which is on the `FlowActionCall` subtype on the Flow metadata type.

**Randomly assign candidates to research study comparison groups**

Use the `assignCndtToResearchStudyGroup` value in the existing `actionType` field, which is on the `FlowActionCall` subtype on the Flow metadata type.

SEE ALSO:

[Life Sciences Cloud Developer Guide: Flow for Life Sciences Cloud](#)

## Loyalty Management

Marketing managers can create flexible promotions rules with the Build Your Own Promotion template in Global Promotions Management. Companies can now decide whether they want their members to hold a negative point balance. Easily clone and launch your repeatable and most successful promotions. Add up to 50,000 partners to your loyalty program. Streamline marketing manager and loyalty program manager onboarding with new permission sets.

IN THIS SECTION:

[Global Promotions Management](#)

Use the Build Your Own Promotion template to create promotion rules whose criteria are based on various cart, product, customer, and custom cart attributes. The template enables brands to offer discounts on carts, line items, unit prices, and combos, along with rewards such as vouchers, badges, and games. Filter carts based on the unique attributes of your products. Design promotion rules with no eligibility criteria. Admins can provide marketing managers access to Global Promotions Management by using permission sets.

[Provide Uninterrupted Member Services with Negative Points Balance](#)

Allow non-qualifying currencies to go negative so members can redeem rewards even if they lack sufficient points balance. Specify a negative balance limit for each tier in your loyalty program to restrict fraud. Adjust the negative balance with points that members accrue for new transactions.

### [Replicate Seasonal and Repetitive Promotions with Minimal Effort](#)

Marketing managers and loyalty program managers can minimize the time and effort needed to create promotions that run multiple times annually or at different intervals throughout the year. When you clone a promotion, the promotion's related data is also cloned. For example, a brand saw high customer traction with a promotion that ran during the Christmas of 2023. Clone the promotion before Christmas each year and make slight modifications to keep the promotion relevant. Clone and run repetitive promotions like shop for US\$50 and get 10% off during different periods.

### [Streamline Program Manager Onboarding](#)

Assign the Manage Loyalty Programs permission set to grant program managers access to all the objects required for creating and running programs. Avoid manually assigning object permissions individually.

### [Increase Your Loyalty Program's Appeal by Partnering with More Brands](#)

Your company's loyalty program can now partner with up to 50,000 brands. With more partners onboarded, the loyalty program can offer members rewards for a more diverse range of products and run varied joint promotions. Earlier, a loyalty program could onboard only 10,000 partners.

### [Quickly Find Vouchers and Badges When You Design Promotion Setup Rules](#)

Program managers can now type the first three letters of the voucher or badge name and select the voucher or the badge that they're looking for. The Issue Voucher and the Assign Badge to Member actions now support type-ahead search for the Voucher Definition and the Loyalty Program Member Badge fields. When program managers create a process by using the Issue Voucher process template, they can use type-ahead search to select the voucher definition for a process.

### [Watch Loyalty Management Videos](#)

New videos help your users learn about the capabilities of Loyalty Management.

### [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 metadata types in Loyalty Management.

## Global Promotions Management

Use the Build Your Own Promotion template to create promotion rules whose criteria are based on various cart, product, customer, and custom cart attributes. The template enables brands to offer discounts on carts, line items, unit prices, and combos, along with rewards such as vouchers, badges, and games. Filter carts based on the unique attributes of your products. Design promotion rules with no eligibility criteria. Admins can provide marketing managers access to Global Promotions Management by using permission sets.

### IN THIS SECTION:

#### [Add Multidimensional Promotion Rules for Nuanced Business Requirements](#)

With the new Build Your Own Promotion template, brands can create multifaceted promotion rules and criteria that span across cart configuration, customer attributes, and product attributes. Marketing managers can also add criteria based on custom cart attributes such as payment method. The promotion rule can also check whether customer carts meet an aggregated condition. The promotion rule can offer customers discounts on cart, cart line items, unit price of cart items, and discounted combos. Along with cart-level discounts, the promotion rule can offer games and vouchers to customers, and points and badges to loyalty program members.

#### [Refine Promotion Rule Eligibility Based on a Product's Attributes](#)

Promotion rules can now contain a product attribute-based criterion that filters a customer's cart based on whether the cart contains products with matching attributes. For example, carts with red color Level X shoes are eligible when the rule's product attribute criteria contain Level X as the product and the attribute as color red. With product attribute-based criteria, companies can run promotions that drive traction for specific products within their portfolio.



### [Design Promotion Rules with No Eligibility Requirements](#)

Marketing managers can now create pricing rules without a qualification criterion. This means that customer carts that are eligible for a promotion are automatically eligible for the promotion's rules that don't contain qualification criteria.

### [Control Who Can Create Promotions with Ease](#)

Admins can now assign users with permission sets that enable them to create and manage promotions. Previously, admins manually assigned users with the object permissions required to create promotions.

## Add Multidimensional Promotion Rules for Nuanced Business Requirements

With the new Build Your Own Promotion template, brands can create multifaceted promotion rules and criteria that span across cart configuration, customer attributes, and product attributes. Marketing managers can also add criteria based on custom cart attributes such as payment method. The promotion rule can also check whether customer carts meet an aggregated condition. The promotion rule can offer customers discounts on cart, cart line items, unit price of cart items, and discounted combos. Along with cart-level discounts, the promotion rule can offer games and vouchers to customers, and points and badges to loyalty program 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.

**Why:** Cloud Kicks wants to run a promotion that offers a 20% discount on carts that contain either one Level X shoe or two Vintage shoes and when the payment mode is credit card. In this scenario, the marketing manager adds two criteria. The conditions in the first criterion verify whether customers have added a Level X shoe or two Vintage shoes to their cart. The condition in the second criterion verifies whether the customer selected a credit card as the cart's payment method. After the marketing manager adds the criteria, they add a 20% discount as the rule's reward.

**How:** In the Select Promotion Template step of the Quick Promotions guided flow, select **Build Your Own Promotion**. Add the rule eligibility criteria in the What Customers Do section and the reward in the What Customers Get section.

The screenshot displays the Salesforce Loyalty Management interface with several sections:

- Combo Promotions:**
  - Buy X, Get Discounted Combo + Rewards (with a red arrow icon)
  - Spend X, Get Discounted Combo + Rewards (with a blue cube icon)
- Loyalty Promotions:**
  - Informational text: "The Loyalty Promotion templates allow you to add only one rule to the promotion. If you use a Loyalty Promotion template, you can't use any other templates in the promotion and you can't add promotion limits. After you activate a promotion that consists of a rule created using a Loyalty Promotion template, you can view the rule design in the Processes tab of the loyalty program." (with an information icon)
  - Accrual Events (with a green calendar icon)
- Custom Promotions:**
  - Informational text: "The Custom Promotion templates are only available if a rule library record with a type of Global Promotions Management is present in the org." (with an information icon)
  - Build Your Own Promotion** (highlighted with an orange border and a blue checkmark icon)

On the right side, there is a sidebar for **Build Your Own Promotion** with the following content:

- Icon of a document with a pencil.
- Build Your Own Promotion**
- Text: "Get the flexibility to create a promotion based on your unique requirements. You get to decide what customers need to do to avail the promotion and what customers get."
- Text: "You can design promotions that offer customers:"
- Three dashed boxes representing promotion types:
  - 10% product or category discount (with a shopping cart icon)
  - 15% discount voucher (with a pink voucher icon)
  - Games (with a yellow dice icon)

SEE ALSO:

[Salesforce Help: Build Your Own Promotion \(can be outdated or unavailable during release preview\)](#)

## Refine Promotion Rule Eligibility Based on a Product's Attributes

Promotion rules can now contain a product attribute-based criterion that filters a customer's cart based on whether the cart contains products with matching attributes. For example, carts with red color Level X shoes are eligible when the rule's product attribute criteria contain Level X as the product and the attribute as color red. With product attribute-based criteria, companies can run promotions that drive traction for specific products within their portfolio.

**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:** The admin must create a custom object with two fields that look up to the Product and the Attribute Definition objects and map the lookup fields in Global Promotion Management's context definition. After the admin completes their setup, product designers or marketing managers can add the attributes for the company's products. On the Build Your Own Promotion template, marketing managers click **Add Custom Attributes**. Select **Product Attributes**, and click **Next**. Select the product and the attributes for the criterion, and click **Done**. A criterion is created. The marketing manager can select the operator and value for each attribute condition.

Rule is Eligible When \*

All Criteria Are Met (AND) ▼

LocationRule Criteria

Criteria is Eligible When \*

Any Condition Is Met (OR) ▼

| * Attribute | * Operator | * Value   |
|-------------|------------|-----------|
| location    | Equals     | Barcelona |
| OR          |            |           |
| location    | Equals     | Madrid    |

+ Add Condition

+ Add Criteria

+ Add Custom Attributes

SEE ALSO:

[Salesforce Help: Set Up Product Attributes for Product-Based Promotion Rule Eligibility Criteria \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Build Your Own Promotion \(can be outdated or unavailable during release preview\)](#)

## Design Promotion Rules with No Eligibility Requirements

Marketing managers can now create pricing rules without a qualification criterion. This means that customer carts that are eligible for a promotion are automatically eligible for the promotion's rules that don't contain qualification criteria.

**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:** When a promotion's eligibility condition specifies that customers have to shop online and the promotion's rule doesn't have a qualification criterion, the promotion's rule is eligible for all online shopping carts.

**How:** In the What Customers Do section on Buy X templates and the Build Your Own Promotion template, select **No qualification criteria**.

What Customers Do

What do customers need to purchase from?

Categories Products 0 categories selected, 0 products selected

No qualification criteria

Customers can purchase from any eligible category

What do customers purchase?

Any of  with minimum  of

Which products do you want to exclude from the selected categories?

## Control Who Can Create Promotions with Ease

Admins can now assign users with permission sets that enable them to create and manage promotions. Previously, admins manually assigned users with the object permissions required to create promotions.

**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:** These permission sets are provided with Global Promotions Management:

- Manage Promotions with Global Promotions Management—To create promotions outside the company's loyalty program.
- Manage Loyalty Promotions with Global Promotions Management—To create promotions for the company's loyalty program.
- Manage Data Cloud Segments with Global Promotions Management—To select Data Cloud segments as the target audience of promotions.
- Manage Promotion Distribution with Global Promotions Management—To design and activate promotion launch emails.

SEE ALSO:

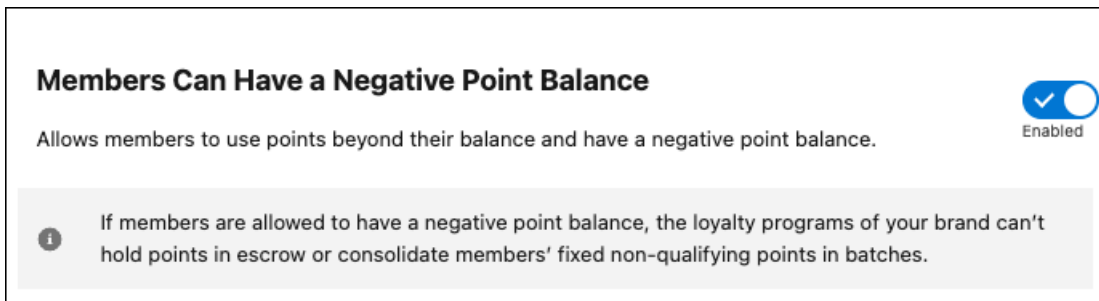
[Salesforce Help: Role-Based Permissions for Global Promotions Management \(can be outdated or unavailable during release preview\)](#)

## Provide Uninterrupted Member Services with Negative Points Balance

Allow non-qualifying currencies to go negative so members can redeem rewards even if they lack sufficient points balance. Specify a negative balance limit for each tier in your loyalty program to restrict fraud. Adjust the negative balance with points that members accrue for new transactions.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Loyalty Management - Growth or Loyalty Management - Advanced is enabled.

**How:** On the Loyalty Management Setting page in Setup, turn on Members Can Have a Negative Point Balance. After enabling the setting, select the **Allow Negative Balance** checkbox for the non-qualifying currencies that allow members to hold a negative point balance. Set the negative balance limit for each tier in the Loyalty Program Currency Tier records.



SEE ALSO:

[Salesforce Help: Enable Negative Point Balance for Non-Qualifying Currencies \(can be outdated or unavailable during release preview\)](#)

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

## Replicate Seasonal and Repetitive Promotions with Minimal Effort

Marketing managers and loyalty program managers can minimize the time and effort needed to create promotions that run multiple times annually or at different intervals throughout the year. When you clone a promotion, the promotion's related data is also cloned. For example, a brand saw high customer traction with a promotion that ran during the Christmas of 2023. Clone the promotion before Christmas each year and make slight modifications to keep the promotion relevant. Clone and run repetitive promotions like shop for US\$50 and get 10% off during different periods.

**Where:** This change applies to Lightning Experience in Developer, Enterprise, Performance, and Unlimited editions where Loyalty Management is available.

**How:** You can deep clone promotions that are created using the Quick Promotion guided flow or standard promotions. On a promotion record, click **Deep Clone**. Choose the promotion details that you want to duplicate, and click **Clone**.

SEE ALSO:

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

[Salesforce Help: Clone Promotions with Global Promotions Management \(can be outdated or unavailable during release preview\)](#)

## Streamline Program Manager Onboarding

Assign the Manage Loyalty Programs permission set to grant program managers access to all the objects required for creating and running programs. Avoid manually assigning object permissions individually.

**Where:** This change applies to Lightning Experience in Developer, Enterprise, Performance, and Unlimited editions where Loyalty Management is available.

## Increase Your Loyalty Program's Appeal by Partnering with More Brands

Your company's loyalty program can now partner with up to 50,000 brands. With more partners onboarded, the loyalty program can offer members rewards for a more diverse range of products and run varied joint promotions. Earlier, a loyalty program could onboard only 10,000 partners.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Loyalty Management - Growth or Loyalty Management - Advanced is enabled.

SEE ALSO:

[Salesforce Help: Manage Loyalty Program Partners \(can be outdated or unavailable during release preview\)](#)

## Quickly Find Vouchers and Badges When You Design Promotion Setup Rules

Program managers can now type the first three letters of the voucher or badge name and select the voucher or the badge that they're looking for. The Issue Voucher and the Assign Badge to Member actions now support type-ahead search for the Voucher Definition and the Loyalty Program Member Badge fields. When program managers create a process by using the Issue Voucher process template, they can use type-ahead search to select the voucher definition for a process.

**Where:** This change applies to Lightning Experience in Developer, Enterprise, Performance, and Unlimited editions where Loyalty Management is available.

## Watch Loyalty Management Videos

New videos help your users learn about the capabilities of Loyalty Management.

- [Design Promotions with Global Promotions Management](#) shows how marketing managers can design pricing and loyalty promotions.
- [Run Promotions with Global Promotions Management](#) demonstrates how system integrators can integrate Global Promotions Management APIs with external systems like shopping site and point-of-sale (POS) systems.
- [Gamify Member Engagement with Loyalty Management](#) shows how loyalty program managers can design games and run games for loyalty program members.
- [Reward Members for Shopping at Multibrand \(Third-Party\) Stores](#) shows how the loyalty program can enable members to receive rewards for purchasing the company's products at multibrand and third-party stores.

## New and Changed Objects in Loyalty Management

Do more with the new and updated Loyalty Management objects.

### Set a limit for the negative points balance that members of a tier can hold for a non-qualifying currency

Use the new `LoyaltyProgramCurrencyTier` object.

### Indicate whether a non-qualifying currency allows members to hold a negative point balance

Use the new `DoesAllowNegativeBalance` field on the existing `LoyaltyProgramCurrency` object.

### Specify the date and time from when a member's redemption settlement is pending

Use the new `RedemStlPendFromDateTime` field on the existing `LoyaltyMemberCurrency` object.

### Identify whether a promotion is created by cloning another promotion

Use the new `IsCloned` and `RelatedPromotionId` fields on the existing `Promotion` object.

SEE ALSO:

[Loyalty Management Developer Guide: Loyalty Management Standard Objects \(can be outdated or unavailable during release preview\)](#)

## New Metadata Types in Loyalty Management

Make the most of the new metadata types in Loyalty Management.

## Settings

### Turn on the capability of members to hold negative point balances for non-qualifying currencies

Use the `enableNegativePointBalance` field on the `IndustriesLoyaltySettings` metadata type.

SEE ALSO:

[Loyalty Management Developer Guide: IndustriesLoyaltySettings](#) (can be outdated or unavailable during release preview)

## Manufacturing Cloud

Harmonize, transform, and unlock insights at scale from asset, customer, sales, and service data by using Data Cloud features. Easily manage your supplier recovery processes to recover the expenses for repairing defective parts procured from suppliers. Orchestrate effective product service campaigns to segment faulty assets, perform product recalls, and manage customer outreach. Generate estimates on field service work before you create work orders.

IN THIS SECTION:

### [Data Cloud Features for Manufacturing Cloud](#)

Unify, harmonize, and analyze your assets operations, commercial operations, and service process data in Data Cloud by using new data model objects and the Manufacturing data kit. Ingest asset telematics and customer data from different sources in data model objects in Data Cloud. Transform, query, and segment asset telematics data at scale. Analyze asset revenue, customer revenue, and customer cases data by using predefined calculated insights. Optimize asset maintenance schedules, maximize operational performance, and improve operator safety by using asset telematics data.

### [Warranty Supplier Recovery](#)

Easily raise supplier recovery claims for parts that are covered under contract terms with suppliers. Significantly improve the supplier recovery rate to reduce warranty costs. If you incur a cost due to quality issues in the products or services provided by a supplier, create supplier recovery claims to recover the cost from the supplier. Create supplier recovery claims from an existing partner warranty claim. Suppliers can adjudicate claims from the Experience Cloud site.

### [Product Service Campaign](#)

Organize focused, fruitful product service campaigns to service faulty products, recall defective assets, and manage customer communications at scale. Service managers at manufacturers can create and manage effective campaigns, nurture customer trust, sustain company reputation, and ensure customer safety. They can effortlessly segment and curate lists of impacted assets. Service agents can use these lists to engage with customers and track services to be performed on assets.

### [Estimate Field Service Work and Quote Costs to Customers Easily](#)

Streamline the work order management process and drive productivity by helping service agents and field service technicians generate cost estimates for onsite services using an intuitive guided flow. They can generate detailed quotes on the cost of the services, and create work orders if customers approve the quotes.

### [Associate Any Sales Agreement with a Contract](#)

Key account managers can now associate sales agreements with contracts if the actuals calculation mode of the sales agreement is "Manually using API upload" or "Automatically from direct orders". Previously, they associated a sales agreement to a contract only if the actuals calculation mode of the sales agreement was "Automatically from orders through contracts". By associating contracts with sales agreements, key account managers can track the agreed-upon terms for the sale of products over a period of time, irrespective of the way the actuals of the sales agreements are updated.

### [Watch Manufacturing Cloud Video](#)

A new video helps your users learn about the Asset Service Console for Manufacturing.

## New and Enhanced Common Features for Industries

Manufacturing Cloud includes some features that are available across clouds and products in Industries. Use these features to extend and customize Manufacturing Cloud based on your business needs.

- [Action Launcher](#)

Contact center agents (CCAs) can quickly resolve customer requests by launching Aura components. CCAs can now search for actions based on semantic search or the meaning of search keywords. Out-of-the-Box Deployment is renamed as Standard Deployment. Use the new and updated objects to provide CCAs with recommended actions and Aura components through Action Launcher.

- [Business Rules Engine](#)

Incorporate new logic into expression set versions efficiently by changing subexpressions in fewer clicks. Map a subexpression's variables to the local resources of the expression set that the subexpression is used in. Easily deactivate or modify the decision tables that are referenced in expression set versions. Use medium-scale decision tables to process a large volume of rows. Save time and effort by using ready-to-use templates to create decision tables. Enhance the decision-making capability of your decision tables by using the Does Not Match and Contains operators.

- [Context Service](#)

Use context definitions as a source for mapping data. Map the nodes and attributes of a context definition to the objects in another context definition. Conveniently generate and edit input mapping for all nodes and attributes of a definition, reducing manual selection of each node. Support different mapping types with mapping intent operations.

- [Data Processing Engine](#)

Upload large amounts of data into your definition with CSV files. Use the Data Cloud runtime with extended functionality for join, filter, formula, and writeback nodes.

- [List Builder for Data Cloud Segment](#)

The records removed from a Data Cloud segment get suppressed in the associated actionable list.

- [Timeline](#)

Configure a data graph in Timeline to show engagement events from data model objects (DMOs), including the Unified Individual DMO. Include event summaries on Timeline.

## Data Cloud Features for Manufacturing Cloud

Unify, harmonize, and analyze your assets operations, commercial operations, and service process data in Data Cloud by using new data model objects and the Manufacturing data kit. Ingest asset telematics and customer data from different sources in data model objects in Data Cloud. Transform, query, and segment asset telematics data at scale. Analyze asset revenue, customer revenue, and customer cases data by using predefined calculated insights. Optimize asset maintenance schedules, maximize operational performance, and improve operator safety by using asset telematics data.

### IN THIS SECTION:

- [Harmonize Asset and Operator Performance Telematics Data](#)

Ingest telematics data on asset operations, operator behavior, and asset faults from various systems into Data Cloud by using predefined data model objects. Standardize and organize asset telematics data from disparate sources and see how different types of data relate to each other. Examine and act on near real-time asset telematics data and track key metrics such as the temperature, pressure, location, and health of assets.



### [Share Data Between Manufacturing Cloud and Data Cloud at Scale Using Data Streams](#)

Connect data on assets, customers, warranties, and sales between Data Cloud and Manufacturing Cloud by using the predefined data streams in the Manufacturing data kit. Seamlessly send the data in Manufacturing Cloud to Data Cloud to query, analyze, and segment the data. Then, use the transformed data to enhance your business processes and give actionable insights to sales and service teams.

### [Make Data-Driven Decisions on Assets and Customer Revenue with Calculated Insights](#)

Use the predefined calculated insights on asset revenue, customer revenue, and customer cases in the Manufacturing data kit to surface meaningful, actionable metrics to sales and service managers and define segments for assets, customers, and other data. Analyze the lifetime revenue of each asset, broken down by sales and service revenue. Optimize service operations by evaluating the count of total, open, and closed cases raised by each customer and for each asset.

### [Visualize Asset Telematics Data](#)

Identify trends and discover patterns on asset operations by viewing visualizations on asset telematics data stored in Data Cloud. Add the Asset Data Model Objects Parent flexcard to the Asset record page so that sales and service teams can view telematics data directly in the Manufacturing app. The flexcard shows metrics based on the latest telematics data from Data Cloud and shows a line graph that traces the output power for assets over time. Optimize asset maintenance schedules, detect potential equipment failure, and optimize routes by tracking metrics such as asset temperature, output power, usage, and location.

### [View Multidimensional Metrics for an Asset](#)

Show the calculated insights on asset revenue and cases that are stored in Data Cloud in the Manufacturing app. Add the Asset Calculated Insights Asset Page Parent Card flexcard to the Asset record page so that sales and service teams can view the calculated insights in the app. Sales teams can track the lifetime revenue for each asset and compare the revenue generated for assets from sales and services to identify high-performing assets. Service teams can examine total, open, and closed cases for each asset to prioritize workload and minimize asset downtime.

### [View Multidimensional Metrics for an Account](#)

Show the calculated insights on customer revenue and cases that are stored in Data Cloud in the Manufacturing app. Add the Asset Calculated Insights Account Page Parent Card flexcard to the Account record page so that sales and service teams can view the calculated insights in the app. Sales teams can track the lifetime revenue for each customer generated from assets to tailor sales strategies to the customer. Service teams can examine the total, open, and closed cases for each account to increase customer satisfaction.

## Harmonize Asset and Operator Performance Telematics Data

Ingest telematics data on asset operations, operator behavior, and asset faults from various systems into Data Cloud by using predefined data model objects. Standardize and organize asset telematics data from disparate sources and see how different types of data relate to each other. Examine and act on near real-time asset telematics data and track key metrics such as the temperature, pressure, location, and health of assets.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions with Manufacturing Cloud and Data Cloud.

**How:** In Data Cloud, on the Data Model Objects tab, go to the All list view. Select a record, such as Asset Telematics Event, Asset Operation, or Asset Operation Operator Behavior.

## Share Data Between Manufacturing Cloud and Data Cloud at Scale Using Data Streams

Connect data on assets, customers, warranties, and sales between Data Cloud and Manufacturing Cloud by using the predefined data streams in the Manufacturing data kit. Seamlessly send the data in Manufacturing Cloud to Data Cloud to query, analyze, and segment the data. Then, use the transformed data to enhance your business processes and give actionable insights to sales and service teams.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions with Manufacturing Cloud and Data Cloud.

**How:** In Data Cloud, on the Data Streams tab, go to the All list view. Select a data stream, such as AssetMilestone, WorkOrder, or WarrantyTerm.

## Make Data-Driven Decisions on Assets and Customer Revenue with Calculated Insights

Use the predefined calculated insights on asset revenue, customer revenue, and customer cases in the Manufacturing data kit to surface meaningful, actionable metrics to sales and service managers and define segments for assets, customers, and other data. Analyze the lifetime revenue of each asset, broken down by sales and service revenue. Optimize service operations by evaluating the count of total, open, and closed cases raised by each customer and for each asset.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions with Manufacturing Cloud and Data Cloud.

**How:** In Data Cloud, on the Calculated Insights tab, go to the All list view. Select a record, such as Asset Lifetime Value or Count Of Open Cases By Customer.

## Visualize Asset Telematics Data

Identify trends and discover patterns on asset operations by viewing visualizations on asset telematics data stored in Data Cloud. Add the Asset Data Model Objects Parent flexcard to the Asset record page so that sales and service teams can view telematics data directly in the Manufacturing app. The flexcard shows metrics based on the latest telematics data from Data Cloud and shows a line graph that traces the output power for assets over time. Optimize asset maintenance schedules, detect potential equipment failure, and optimize routes by tracking metrics such as asset temperature, output power, usage, and location.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions with Manufacturing Cloud and Data Cloud.

**Who:** Users must have the Data Cloud Metrics Visualization permission set.

**How:** Add the Flexcard component to an Asset record page in the Lightning App Builder. Select the **Asset Data Model Objects Parent** flexcard and modify the section names and metric display names as required.

## View Multidimensional Metrics for an Asset

Show the calculated insights on asset revenue and cases that are stored in Data Cloud in the Manufacturing app. Add the Asset Calculated Insights Asset Page Parent Card flexcard to the Asset record page so that sales and service teams can view the calculated insights in the app. Sales teams can track the lifetime revenue for each asset and compare the revenue generated for assets from sales and services to identify high-performing assets. Service teams can examine total, open, and closed cases for each asset to prioritize workload and minimize asset downtime.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions with Manufacturing Cloud and Data Cloud.

**Who:** Users must have the Data Cloud Metrics Visualization permission set.

**How:** Add the Flexcard component to a Vehicle record page in the Lightning App Builder. Select the **Asset Calculated Insights Asset Page Parent Card** flexcard and modify the help text and display names as required.

## View Multidimensional Metrics for an Account

Show the calculated insights on customer revenue and cases that are stored in Data Cloud in the Manufacturing app. Add the Asset Calculated Insights Account Page Parent Card flexcard to the Account record page so that sales and service teams can view the calculated insights in the app. Sales teams can track the lifetime revenue for each customer generated from assets to tailor sales strategies to the customer. Service teams can examine the total, open, and closed cases for each account to increase customer satisfaction.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions with Manufacturing Cloud and Data Cloud.

**Who:** Users must have the Data Cloud Metrics Visualization permission set.

**How:** Add the Flexcard component to an Account record page in the Lightning App Builder. Select the **Asset Calculated Insights Account Page Parent Card** flexcard and modify the help text and display names as required.

## Warranty Supplier Recovery

Easily raise supplier recovery claims for parts that are covered under contract terms with suppliers. Significantly improve the supplier recovery rate to reduce warranty costs. If you incur a cost due to quality issues in the products or services provided by a supplier, create supplier recovery claims to recover the cost from the supplier. Create supplier recovery claims from an existing partner warranty claim. Suppliers can adjudicate claims from the Experience Cloud site.

### IN THIS SECTION:

#### [Establish Contract Terms for Supplier Cost Recovery](#)

Use contracts to drive collaboration with your suppliers and mutually agree on supplier recovery terms. Specify the price that a supplier pays for a causal part, whether a part must be returned to a supplier, and the recovery terms for repairs and replacements. The claimed amount for supplier recovery claims is automatically derived from the contract.

#### [Efficiently Create and Edit Supplier Recovery Claims](#)

With a single click, create a supplier recovery claim for each causal part covered under a warranty claim. Use the Summary tab of a supplier recovery claim to track information about the causal part and expenses claimed from the supplier. Update the claimed amount and quantity before you submit the claim, or when you negotiate with suppliers.

#### [Manage Supplier Recovery Claims by Efficiently Using the Experience Cloud](#)

Claim adjudicators at the supplier organizations can now use the Experience Cloud site to review the supplier recovery claims. The claim adjudicators can approve or reject claims, and access the contracts and products information directly from the Experience Cloud site.

## Establish Contract Terms for Supplier Cost Recovery

Use contracts to drive collaboration with your suppliers and mutually agree on supplier recovery terms. Specify the price that a supplier pays for a causal part, whether a part must be returned to a supplier, and the recovery terms for repairs and replacements. The claimed amount for supplier recovery claims is automatically derived from the contract.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions with Manufacturing Cloud. The user interface of this product is available in English only and may not be fully supported in other languages.

**Who:** This feature is available to users with the Warranty Lifecycle Management and Claims Foundation permission sets.

**How:** Enter into a contract with a supplier to define the supplier recovery terms. Stipulate the recovery terms in the supplier contract to determine the payout.

## Efficiently Create and Edit Supplier Recovery Claims

With a single click, create a supplier recovery claim for each causal part covered under a warranty claim. Use the Summary tab of a supplier recovery claim to track information about the causal part and expenses claimed from the supplier. Update the claimed amount and quantity before you submit the claim, or when you negotiate with suppliers.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions with Manufacturing Cloud. The user interface of this product is available in English only and may not be fully supported in other languages.

**Who:** This feature is available to users with the Warranty Lifecycle Management and Claims Foundation permission sets.

**How:** From the App Launcher, find and select **Claims**. Open a warranty claim record from the list view, and click **Create Supplier Recovery Claims**.

## Manage Supplier Recovery Claims by Efficiently Using the Experience Cloud

Claim adjudicators at the supplier organizations can now use the Experience Cloud site to review the supplier recovery claims. The claim adjudicators can approve or reject claims, and access the contracts and products information directly from the Experience Cloud site.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions with Manufacturing Cloud. The user interface of this product is available in English only and may not be fully supported in other languages.

**Who:** This feature is available to users with the Warranty Lifecycle Management, Claims Foundation, and Warranty Supplier Recovery for Experience Cloud permission sets.

**How:** As a supplier, log in to the Experience Cloud site to track and review the supplier recovery claims raised by the manufacturer. Review the claims before approving or rejecting the payout.

## Product Service Campaign

Organize focused, fruitful product service campaigns to service faulty products, recall defective assets, and manage customer communications at scale. Service managers at manufacturers can create and manage effective campaigns, nurture customer trust, sustain company reputation, and ensure customer safety. They can effortlessly segment and curate lists of impacted assets. Service agents can use these lists to engage with customers and track services to be performed on assets.

### IN THIS SECTION:

#### [Manage Mass Asset Recalls, Services, and Upgrades Efficiently](#)

Design effective, timely product service campaigns to assess and address issues on large numbers of products or services. Specify the impacted product, and the priority, duration, status, and type of a campaign. Track each asset that is the focus of a product service campaign. Create work orders and return orders to capture the services to be performed on impacted products.

#### [Identify and Segment Assets in Product Service Campaigns Easily](#)

Swiftly curate lists of assets that you want to recall, audit, fix, or upgrade by creating actionable lists for product service campaigns. Specify sophisticated filter conditions or use Data Cloud segments to group assets that you want to include in actionable lists. With a single click, add items from actionable lists to product service campaigns. Set list priorities, sort list orders, customize details, and assign lists to service agents for engagement initiatives and service activities.

### SEE ALSO:

[Product Service Campaign](#)

## Manage Mass Asset Recalls, Services, and Upgrades Efficiently

Design effective, timely product service campaigns to assess and address issues on large numbers of products or services. Specify the impacted product, and the priority, duration, status, and type of a campaign. Track each asset that is the focus of a product service campaign. Create work orders and return orders to capture the services to be performed on impacted products.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions with Manufacturing Cloud. The user interface of this product is available in English only and may not be fully supported in other languages.

**Who:** Users must have the Product Service Campaign permission set.

**How:** Create a Product Service Campaign record, and specify its details.

Then, create a Product Service Campaign Item record, and specify its details.

Create a Return Order or a Work Order record from the related list of a product service campaign record.

## Identify and Segment Assets in Product Service Campaigns Easily

Swiftly curate lists of assets that you want to recall, audit, fix, or upgrade by creating actionable lists for product service campaigns. Specify sophisticated filter conditions or use Data Cloud segments to group assets that you want to include in actionable lists. With a single click, add items from actionable lists to product service campaigns. Set list priorities, sort list orders, customize details, and assign lists to service agents for engagement initiatives and service activities.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions with Manufacturing Cloud. The user interface of this product is available in English only and may not be fully supported in other languages.

**Who:** This feature is available to users who have the Actionable Segmentation, Query for Data Pipelines, and Product Service Campaign permission sets.

**Why:** Manufacturers store rich data on a large number of assets. It's cumbersome to identify faulty assets and individually add them to product service campaigns. Service managers can identify and add a large number of assets to product service campaigns easily by using actionable lists.

**How:** On a Product Service Campaign record page, click **Create Actionable List**. Create an actionable list and click **Add to Service Campaign**.

## Estimate Field Service Work and Quote Costs to Customers Easily

Streamline the work order management process and drive productivity by helping service agents and field service technicians generate cost estimates for onsite services using an intuitive guided flow. They can generate detailed quotes on the cost of the services, and create work orders if customers approve the quotes.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions with Manufacturing Cloud. The user interface of this product is available in English only and may not be fully supported in other languages.

**Who:** Users must have the Work Order Estimation permission set.

**How:** Launch the work order estimation process from an account, an asset, or an existing work order. Define the work to be done on the quote by providing the details, review the quote summary, and then generate a quote. After the customer approves the quote, work orders are generated.

SEE ALSO:

[Work Order Estimation](#)

## Associate Any Sales Agreement with a Contract

Key account managers can now associate sales agreements with contracts if the actuals calculation mode of the sales agreement is “Manually using API upload” or “Automatically from direct orders”. Previously, they associated a sales agreement to a contract only if the actuals calculation mode of the sales agreement was “Automatically from orders through contracts”. By associating contracts with sales agreements, key account managers can track the agreed-upon terms for the sale of products over a period of time, irrespective of the way the actuals of the sales agreements are updated.


**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.

**How:** On a contract record, specify a sales agreement with the “Manually using API upload actuals calculation” or “Automatically from direct orders” mode.

## Watch Manufacturing Cloud Video

A new video helps your users learn about the Asset Service Console for Manufacturing.

-  [Explore Asset Service Console for Manufacturing](#) explains how service agents, warranty adjudicators, and service technicians at manufacturers can use the Asset Service Console for Manufacturing to manage assets efficiently, resolve issues quickly, and minimize asset downtime.

## Media Cloud

With the Media Cloud business applications you can 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](#).

## Net Zero Cloud

Address compliance reporting with new features and enhancements to Net Zero Cloud and Disclosure and Compliance Hub. Design and maintain disclosure document templates directly in Microsoft 365 Word. After you upload your disclosure reports from previous years, Einstein generative AI helps you quickly create responses by searching for existing answers in your documents. Einstein can also provide detailed explanations for each response, and help you confirm accuracy. View and export the greenhouse gas emissions calculations. Enable field history tracking for seamless tracking of value changes in Net Zero Cloud objects. Make primary data acquisition easier and more straightforward through a new simplified data collection. Streamline your workflows by giving users full access to data entry and calculations.

### IN THIS SECTION:

#### [Insert Questions and Response Placeholders in Microsoft 365 Word to Design Document Templates for ESG Disclosures](#)

Design and maintain disclosure document templates for environment, social, and governance (ESG) disclosures directly in Microsoft 365 Word by using the Salesforce Disclosure and Compliance Hub for Microsoft 365 Word add-in. Your admins or independent software vendors (ISVs) use the add-in to insert questions and placeholders for the response data that an ESG compliance report might require, including images, charts, and sheets. The reports that you launch by using the template help the add-in understand the structure of the document and also allow for a more intelligent experience.

#### [Einstein for Net Zero Cloud](#)

Use Einstein generative AI to get recommended answers from uploaded disclosure reports. Improve environment, social, and governance (ESG) report accuracy by using Einstein to compare the guidance for a question to your proposed answer.

### [Export Carbon Calculations for Audit](#)

View and export the greenhouse gas emissions calculations used in annual emissions inventory and carbon footprints to audit Net Zero Cloud calculations. To verify the validity of the calculations, an auditor can view the original values used in greenhouse gas emissions calculations, the formulas used, and the system-calculated values.

### [Track Value Changes in Key Objects and Fields](#)

Turn on field history tracking with a single action to expedite the setup process to track value changes for key Net Zero Cloud objects and fields. Enable Field Audit Trail to seamlessly retain archived field history data for Net Zero Cloud objects.

### [Simplify Energy Use Data Collection](#)

Input energy use data through a new simplified lightning web component to collect data faster and easier and increase data quality. Select the energy use type, enter the fields associated with the energy use entity, and upload any supporting documentation for the record.

### [Grant Energy Use Data Upload and Entry Permissions to Users](#)

Provide users with a Lightning Platform user license full access to data entry, calculations, and other lightweight functionalities, including the ability to input carbon, energy, water, and waste data with a new permission set license. Previously, all Net Zero Cloud functions were available to users with a Salesforce user license.

### [Other Improvements to Custom Fuel Framework](#)

Improve carbon accounting by implementing these enhancements: Use the developer name instead of record identifiers to capture the API names of custom fuels and custom units of measure. Address the gallons unit discrepancy in vehicle asset energy use for custom fuels. Use standard weight units for custom fuels.

### [Other Improvements to Scope Allocation](#)

Align carbon accounting with the Greenhouse Gas (GHG) Protocol by accurately allocating emissions to the correct scope for leased vehicles and for employees working from home (stationary assets).

### [New and Changed Objects for Net Zero Cloud](#)

Do more with the new and changed Net Zero Cloud objects.

### [Metadata API](#)

Access more metadata through these new and changed metadata types.

## Insert Questions and Response Placeholders in Microsoft 365 Word to Design Document Templates for ESG Disclosures

Design and maintain disclosure document templates for environment, social, and governance (ESG) disclosures directly in Microsoft 365 Word by using the Salesforce Disclosure and Compliance Hub for Microsoft 365 Word add-in. Your admins or independent software vendors (ISVs) use the add-in to insert questions and placeholders for the response data that an ESG compliance report might require, including images, charts, and sheets. The reports that you launch by using the template help the add-in understand the structure of the document and also allow for a more intelligent experience.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions with the Net Zero Cloud Growth license.

**Who:** To edit Word documents, you need a Microsoft 365 license.

**How:** Install the add-in from the Microsoft store. From Setup, in the Quick Find box, in the Quick Find box, enter *Disclosure and Compliance Hub*, and then select **Disclosure and Compliance Hub Settings**. Turn on Use Disclosure and Compliance Hub Plugin for Microsoft 365.

To use the Design Document Template to create Microsoft 365 Word templates in Salesforce, from Setup, in the Quick Find box, enter *Document Generation*, select **General Settings**, and then select **Design Document Templates in Salesforce**.

SEE ALSO:

[Salesforce Help: Design Document Templates in Microsoft 365 Word \(can be outdated or unavailable during release preview\)](#)

## Einstein for Net Zero Cloud

Use Einstein generative AI to get recommended answers from uploaded disclosure reports. Improve environment, social, and governance (ESG) report accuracy by using Einstein to compare the guidance for a question to your proposed answer.

IN THIS SECTION:

[Search for and Draft ESG Reports \(Beta\)](#)

Use Einstein generative AI to draft environment, social, and governance (ESG) reports directly in Microsoft 365 Word by using the Salesforce Disclosure and Compliance Hub for Microsoft 365 Word add-in. Use the Einstein Search for Disclosures feature to upload your previous years' disclosure reports and reduce the amount of time spent creating responses by using generative AI, which recommends answers by analyzing the uploaded documents.

[Other Improvements for ESG Report Accuracy Assessment by Using Einstein Generative AI](#)


Improve environment, social, and governance (ESG) report accuracy by using Einstein generative AI to compare the guidance for a question with your proposed response, directly in Microsoft 365 Word with the Salesforce Disclosure and Compliance Hub for Microsoft 365 Word add-in.

## Search for and Draft ESG Reports (Beta)

Use Einstein generative AI to draft environment, social, and governance (ESG) reports directly in Microsoft 365 Word by using the Salesforce Disclosure and Compliance Hub for Microsoft 365 Word add-in. Use the Einstein Search for Disclosures feature to upload your previous years' disclosure reports and reduce the amount of time spent creating responses by using generative AI, which recommends answers by analyzing the uploaded documents.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions with the Net Zero Cloud Growth license and the Einstein for Sales, Einstein for Service, or Einstein for Platform add-on license. 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.

 **Note:** Einstein Search for Disclosures is a beta service that is subject to the Beta Services Terms at [Agreements - Salesforce.com](#) or a written Unified Pilot Agreement if executed by Customer, and the Non-GA Gen AI, the Non-GA OpenAI LLM Provider, and the Non-GA Credit Consumption terms in the [Product Terms Directory](#). Use of this beta service is at the Customer's sole discretion.

**Who:** To edit Word documents, you need a Microsoft 365 license.

**How:** Install the add-in from the Microsoft store. From Setup, in the Quick Find box, enter *Disclosure and Compliance Hub*, and then select **Disclosure and Compliance Hub Settings**. Turn on **Einstein for Disclosure Authoring**.

SEE ALSO:

[Salesforce Help: Einstein Generative AI For ESG Report Generation \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: ESG Report Generation with Einstein Generative AI \(can be outdated or unavailable during release preview\)](#)



## Other Improvements for ESG Report Accuracy Assessment by Using Einstein Generative AI

Improve environment, social, and governance (ESG) report accuracy by using Einstein generative AI to compare the guidance for a question with your proposed response, directly in Microsoft 365 Word with the Salesforce Disclosure and Compliance Hub for Microsoft 365 Word add-in.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions with the Net Zero Cloud Growth license and the Einstein for Sales, Einstein for Service, or Einstein for Platform add-on license. 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.

**Who:** To edit Word documents, you need a Microsoft 365 license.

**Why:** These improvements help refine the quality of the disclosure reports.

- Seek specific guidance for each question.

A disclosure question can have multiple related questions, and the guidance provided with the question from the disclosure authority describes the expected response for each of them. Einstein provides explanations for each question and related question and the expected response, helping you validate the answers and provide feedback to improve them.

The screenshot displays the 'Disclosure and Compliance Hub Connector Test App' interface. On the left, the 'ESRS Question set' includes three questions: E1-1-14 (Transition plan), E1-2-22 (Policies), and E1-4-30 (Targets). Each question has a corresponding 'Enter a response...' field. On the right, the 'Guidance on Question' section provides detailed information for paragraph 13, listing four requirements for GHG emission reduction targets. At the bottom of the right pane, there are two buttons: 'Ask Einstein' and 'Analyze Response'.

- Analyze the response to a question by using Einstein.

Einstein provides a score to help you evaluate the validity and correctness of a response by considering criteria such as the completeness of the answer and the syntax.

**ESRS Question set**

**E1-1-14 Transition plan for climate change mitigation - The undertaking shall disclose its transition plan for climate change mitigation.**  
We will ensure that our targets are compatible with the limiting of global warming to 1.5°C by 2049 in line with the Paris Agreement.

**E1-2-22 Policies related to climate change mitigation and adaptation - The undertaking shall describe its policies adopted to manage its material impacts, risks and opportunities related to climate change mitigation and adaptation.**  
Enter a response...

**E1-3-26 Actions and resources in relation to climate change policies - The undertaking shall disclose its climate change mitigation and adaptation actions and the resources allocated for their implementation.**  
Enter a response...

**E1-4-30 Targets related to climate change mitigation and adaptation - The undertaking shall disclose the climate-related targets it has set.**  
Enter a response...

**Disclosure and Compliance Hub Connector Test App**

Total Responses 2/12

Document Clause Library

← Back

E1-1-14 Transition plan for climate change mitigation - The u...

> Guidance on Question

∨ Response Accuracy

▲ Response is 13% accurate

You haven't fully addressed the specific requirements outlined in the question. See if these instructions will help improve your response accuracy.

1. The undertaking should provide an explanation of the decarbonisation levers identified, and key actions planned, including changes in the product and service portfolio and its adoption of new technologies.
2. The undertaking should provide an explanation of its investments and funding supporting the implementation of the transition plan.

⚡ Ask Einstein Analyze Response

**How:** Install the add-in from the Microsoft store. From Setup, in the Quick Find box, enter *Disclosure and Compliance Hub*, and then select **Disclosure and Compliance Hub Settings**. Turn on Einstein for Disclosure Authoring and then turn on Einstein to Search for Disclosures. After you set up Einstein to Search for Disclosures, add the Guidance Information field to the Assessment Question Version object's page layout.

SEE ALSO:

[Salesforce Help: Search for Disclosure Guidance \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Analyze the Answers with Einstein Generative AI \(can be outdated or unavailable during release preview\)](#)

## Export Carbon Calculations for Audit

View and export the greenhouse gas emissions calculations used in annual emissions inventory and carbon footprints to audit Net Zero Cloud calculations. To verify the validity of the calculations, an auditor can view the original values used in greenhouse gas emissions calculations, the formulas used, and the system-calculated values.

**When:** The Export Carbon Calculations for Audit feature is available starting in July 8, 2024.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions with the Net Zero Cloud Growth license.

**How:** From Setup, in the Quick Find box, enter *Net Zero*, and then select **Net Zero Settings**. Turn on **Store Calculation Metadata for Calculation Export**.

SEE ALSO:

[Salesforce Help: Export Carbon Calculations \(can be outdated or unavailable during release preview\)](#)

## Track Value Changes in Key Objects and Fields

Turn on field history tracking with a single action to expedite the setup process to track value changes for key Net Zero Cloud objects and fields. Enable Field Audit Trail to seamlessly retain archived field history data for Net Zero Cloud objects.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions with the Net Zero Cloud Starter or Growth license.

**How:** From Setup, in the Quick Find box, enter *Field History Tracking*, and then select **Field History Tracking**. Turn on Set Net Zero Cloud Defaults.

SEE ALSO:

[Salesforce Help: Track Field History in Net Zero Cloud \(can be outdated or unavailable during release preview\)](#)

[Monitor Net Zero Cloud Changes with Field History Tracking \(can be outdated or unavailable during release preview\)](#)

[Audit Net Zero Cloud Field Changes \(can be outdated or unavailable during release preview\)](#)

## Simplify Energy Use Data Collection

Input energy use data through a new simplified lightning web component to collect data faster and easier and increase data quality. Select the energy use type, enter the fields associated with the energy use entity, and upload any supporting documentation for the record.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions with the Net Zero Cloud Starter or Growth license.

**Who:** Simplified data collection is available to Salesforce users with the Net Zero Cloud Manager or Net Zero Cloud Admin user permission set, or Salesforce platform users with the Net Zero Cloud Light user permission set.

SEE ALSO:

[Salesforce Help: Set Up Energy Use Data Collection \(can be outdated or unavailable during release preview\)](#)

## Grant Energy Use Data Upload and Entry Permissions to Users

Provide users with a Lightning Platform user license full access to data entry, calculations, and other lightweight functionalities, including the ability to input carbon, energy, water, and waste data with a new permission set license. Previously, all Net Zero Cloud functions were available to users with a Salesforce user license.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions with the Net Zero Cloud Starter or Growth License.

**How:** Create or edit a Lightning Platform user, and then assign the Net Zero Cloud Light user permission set to that user.

SEE ALSO:

[Salesforce Help: Determine Which Permission Set to Assign \(can be outdated or unavailable during release preview\)](#)

## Other Improvements to Custom Fuel Framework

Improve carbon accounting by implementing these enhancements: Use the developer name instead of record identifiers to capture the API names of custom fuels and custom units of measure. Address the gallons unit discrepancy in vehicle asset energy use for custom fuels. Use standard weight units for custom fuels.

**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 enhance the accuracy of carbon accounting for custom fuels and units of measure.

- Reduce customer confusion when uploading custom fuels and units of measure and when making API calls.

Simplify querying custom fuels and migration of custom fuel records from one organization to another by using the developer name derivative to capture the API names of custom fuels and units of measure instead of 18-digit record identifiers.

- For custom fuel, if the NamespacePrefix exists, the API name for fuel type is `{NamespacePrefix}_custom_{DeveloperName of the FuelType object}` (for example, `ftPackage_custom_wood`), otherwise it's `custom_{DeveloperName of the FuelType object}` (for example `custom_wood`).
- For a custom unit of measure, if the NamespacePrefix exists, the API name for the unit of measure is `{NamespacePrefix}_custom_{DeveloperName of the SustainabilityUom object}` (for example, `ftPackage_custom_bundle`), otherwise it is `custom_{DeveloperName of the SustainabilityUom object}` (for example `custom_bundle`).

- Make sure backward compatibility in carbon emissions calculations by using US Gallons unit of measure in vehicle asset energy use fuels instead of Gallons.

Use US Gallons unit of measure for the fuel consumption unit in vehicle asset energy use. US Gallons is backward compatible and can be used when used with a custom fuel framework.

- Enhance custom fuel framework by using standard weight units for a custom fuel.

Use standard weight or mass units of measure (lbs, Kg, long tons, short tons, tonnes) for a custom fuel to calculate its carbon emissions. Ensure that the conversion to standard units, Kwh or GJ, for the custom fuel type is specified and the correct emissions factor is applied to accurately calculate emissions.

## Other Improvements to Scope Allocation

Align carbon accounting with the Greenhouse Gas (GHG) Protocol by accurately allocating emissions to the correct scope for leased vehicles and for employees working from home (stationary assets).

**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 with GHG Protocol compliance and make sure that scope allocation to GHG scopes is accurate for leased vehicles and employees working from home.

- To set the scope allocation in the vehicle asset emissions source to allocate emissions from leased vehicles to Scope 3, Category 13 (Downstream Leased Assets) use the Total Scope 3 Downstream Leased Assets picklist value in Carbon Emissions Scope Allocation of Vehicle Asset Emissions Source. These emissions are categorized under Scope 3, Category 13 in Vehicle Asset Energy Use and Vehicle Asset Carbon Footprint.
- To set scope allocation in the stationary asset environmental source to allocate emissions from employees working from home, use the Scope 3 Employee Commuting picklist value in Fuel Type Allocation of Carbon Emissions Scope Allocation Value. These emissions are categorized under Scope 3, Category 7 in Stationary Asset Energy Use and Stationary Asset Carbon Footprint.

## New and Changed Objects for Net Zero Cloud

Do more with the new and changed Net Zero Cloud objects.

## Changed Objects

### Add guidance for the assessment question

Use the new *GuidanceInformation* field on the *AssessmentQuestionVersion* object.

### Store the total scope 3 emissions from the employee commute

Use the new *Scp3EmsSnEmpCommute* field on the *StnryAssetCrbnFtrprt* object.

### Store the total scope 3 emissions from downstream leased assets

Use the new *Scp3EmsSnDnstrmLsdAst* field on the *VehicleAssetCrbnFtrprt* object.

## New Object

### Store the documents that are referenced to search for answers during documentation authoring

Use the new *SearchableReferenceDocument* object.

## Metadata API

Access more metadata through these new and changed metadata types.

## Net Zero

### Set up authoring mode and integrate document templates for versioned disclosures

Use the new *authoringMode* and *documentTemplateGlobalKey* fields on the existing *DisclosureDefinitionVersion* metadata type. Introduced in API version 61.0, this field has been added to the *Industries Common Resource Developer Guide*.

SEE ALSO:

[Metadata API Developer Guide: DisclosureDefinitionVersion \(can be outdated or unavailable during release preview\)](#)

## Public Sector Solutions

Make it easy for constituents to file and track claims for social insurance benefits. Find and address circumstances that prevent constituents from getting the care or services that they need. Coordinate with service providers to manage referrals and efficiently deliver services to constituents. Easily capture interaction notes with a single unified component. Help constituents recertify for benefits to renew or revise their benefit eligibility. Collaborate with partner organizations and funders to share performance indicators and outcome results.

IN THIS SECTION:

### [Enable Constituents to File Social Insurance Claims](#)

Provide guided flows on your Experience Cloud site that simplify the claims process for constituents enrolled in social insurance programs. For example, they can use a guided flow on your site to provide details of a work-related injury, upload supporting documentation, and file a workers' compensation claim. The employer can use a guided flow to view the claim, verify its details, and provide additional required information. Constituents can also track the status of their workers' compensation claim on the site.

### [Tackle Care Barriers with Care Plans and Goals](#)

Identify circumstances that prevent constituents from getting the care and services that they need. Create personalized care plans that factor in these circumstances. Assign constituents additional benefits or services for which they're eligible. Define goals to measure their progress and the effectiveness of the plans.

### [Enhance Service Delivery Experience for Public Sector Providers](#)

Give service providers greater control over managing their clients and collaborate with them to deliver services with an Experience Cloud site template designed for their needs. The template offers a comprehensive suite of capabilities to streamline business operations and promote transparent collaboration between agencies and clients.

### [Efficiently Capture Complete Interaction Notes by Using a Guided Flow](#)

Caseworkers can use a single guided flow to easily capture meeting notes. Use the flow to write detailed notes, record attendees, document the date and time, add tags, and upload supporting documents. They can also share their notes with other users, and publish the approved notes to prevent any further edits. This efficient, unified workflow saves caseworkers from going to multiple pages to manage written and verbal communications.

### [Redetermine Benefit Eligibility When Constituents Recertify for Benefits](#)

Provide a guided flow on your Experience Cloud site for constituents to easily recertify their circumstances to continue to receive a benefit. Then, use another guided flow to review their recertification information and supporting documents. Check their benefit eligibility and renew or adjust their assigned benefit amount as necessary.

### [Share Performance Indicators and Outcome Results on an Experience Cloud Site](#)

Gain transparency and alignment by sharing your agency's strategy and results with partner organizations and funders. Collaborate with grantees to define indicators and targets, and collect indicator results from grantees, field staff, and partner organizations.

### [Help Employees Do More on the Employee Experience Cloud Site](#)

Employees can complete the assessments assigned to them, file complaints about policy violations, and take the corrective actions recommended by supervisors for any complaints filed against them. Employees can also apply for and get the benefits and assistance that they need from the organization. Supervisors can administer performance assessments and create personalized care plans for employee development. They can assign training programs to employees and track the progress of the employees through goals.

### [IdeaExchange Delivered: Give Inspectors a Link to More Information About a Regulatory Code](#)

When a regulatory code is long or complex, inspectors need more information than what's included in the regulatory code's description. Use the new External URL field to add a link to an external resource where inspectors can find all the details that they need. We delivered this feature thanks to your ideas on IdeaExchange.

### [IdeaExchange Delivered: Make Follow-Up Visits Easier for Inspectors by Relating Them to the Previous Visit](#)

On a follow-up visit to an establishment, help inspectors quickly find the regulatory code violations from the previous visit, the violation enforcement actions assigned to the owner, and the items to check for compliance. We delivered this feature thanks to your ideas on IdeaExchange.

### [Set Up Service Excellence Capabilities More Easily](#)

Use a guided setup assistant to easily configure features that help caseworkers to address concerns raised by constituents and to deliver excellent customer service, including action launcher, record alerts, and identity verification. In-app links help you quickly configure required settings, while help links offer context and guidance for each task.

### [Improvement in Dynamic Assessments](#)

Save additional information about dynamic assessments in custom fields on the Assessment object. Previously, you saved information only in the standard fields.

### [Set Up Licensing and Permitting Flows with Out-of-the-Box Components](#)

Use readily available OmniStudio components in your org to set up guided flows that constituents can use to file health and safety complaints against a business or individual and to assess their license and permit needs. 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.

### [Keep Your Benefit Management Flows Up to Date with the Latest Fixes and Improvements](#)

After your org upgrades to Summer '24, deploy version v5 of the Public Sector Benefit Management Discovery Framework sample template. Then, to ensure that your flows continue to work as intended, check to see if the components that you use have a new version, and customize and activate them as necessary.

### [New and Changed Objects in Public Sector Solutions](#)

Do more with these new and changed objects.

### [Metadata API](#)

Access more metadata through these new and changed metadata types.

## 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 needs.

- [Action Launcher](#)

Contact center agents can quickly resolve customer requests by launching Aura components. They can now search for actions based on semantic search or the meaning of search keywords. Out-of-the-Box Deployment is renamed as Standard Deployment. Use the new and updated objects to provide agents with recommended actions and Aura components through Action Launcher.

- [Business Rules Engine](#)

Incorporate new logic into expression set versions efficiently by changing subexpressions in fewer clicks. Map a subexpression's variables to the local resources of the expression set that the subexpression is used in. Easily deactivate or modify the decision tables that are referenced in expression set versions. Use medium-scale decision tables to process a large volume of rows. Save time and effort by using ready-to-use templates to create decision tables. Enhance the decision-making capability of your decision tables by using the Does Not Match and Contains operators.

- [Criteria-Based Search and Filter](#)

Enhance the search experience for customers and external partners by adding Criteria-Based Search and Filter to your Experience Cloud sites. Help users visualize data by showing resources from search results in an interactive map. Show search results as easier-to-manage cards.

- [Data Processing Engine](#)

Upload large amounts of data into your definition with CSV files. Use the Data Cloud runtime with extended functionality for join, filter, formula, and writeback nodes.

- [Engagement](#)

Einstein Copilot can now generate a summary of one or more customer interactions.

- [Grantmaking](#)

Create robust grant applications that allow grant seekers to save their progress and quickly see what sections are incomplete. Applicants can also add collaborators to complete different sections of the application. Track and measure the impact of your grants with Outcome Management. Ask grant recipients to report the outcomes achieved with your grant funding in Experience Cloud.

- [Intelligent Document Reader](#)

Get Intelligent Document Reader to easily extract unstructured content and tables from documents, excluding unwanted records.

- [OmniStudio](#)

In Summer '24, OmniStudio Standard (when the Managed Package Runtime setting is disabled) supports features from OmniStudio for Vlocity, including filling address fields in OmniScripts with Google Map data, using Salesforce Private Connect for HTTP Actions in Integration Procedures, choosing whether to merge entries within a list in an Integration Procedure List Action, and easily accessing the Type Ahead Block in OmniScript from enhanced base Lightning components. Also, DataRaptor is now Omnistudio Data Mapper.

- [Program Management](#)

Quickly remove one or more participants from all upcoming benefit sessions. Group program participants by cohort to better track results for individuals or the whole cohort. Save time with the new Program Management home page.

- [Rollup Definitions for Record Rollups](#)

Use the new Rollup Definitions feature to streamline the aggregation of records from various objects or groups and to provide a consolidated view of your data. Your business executives can use the consolidated data to make informed decisions more quickly and accurately.

- [Timeline](#)

Configure a data graph in Timeline to show engagement events from data model objects (DMOs), including the Unified Individual DMO. Include event summaries on Timeline.

SEE ALSO:

[Public Sector Solutions Products: User, Feature, and Permission Set Licenses \(can be outdated or unavailable during release preview\)](#)

## Enable Constituents to File Social Insurance Claims

Provide guided flows on your Experience Cloud site that simplify the claims process for constituents enrolled in social insurance programs. For example, they can use a guided flow on your site to provide details of a work-related injury, upload supporting documentation, and file a workers' compensation claim. The employer can use a guided flow to view the claim, verify its details, and provide additional required information. Constituents can also track the status of their workers' compensation claim on the site.

**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 the Social Insurance Claim Flow \(can be outdated or unavailable during release preview\)](#)

## Tackle Care Barriers with Care Plans and Goals

Identify circumstances that prevent constituents from getting the care and services that they need. Create personalized care plans that factor in these circumstances. Assign constituents additional benefits or services for which they're eligible. Define goals to measure their progress and the effectiveness of the plans.

**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 Benefits \(can be outdated or unavailable during release preview\)](#)

## Enhance Service Delivery Experience for Public Sector Providers

Give service providers greater control over managing their clients and collaborate with them to deliver services with an Experience Cloud site template designed for their needs. The template offers a comprehensive suite of capabilities to streamline business operations and promote transparent collaboration between agencies and clients.

**Where:** This change applies to Lightning Experience for an extra cost in Enterprise, Performance, Unlimited, and Developer editions where Public Sector Solutions is enabled.

**Who:** To use this feature, provider users need the Provider Management for Partner permission set license.



**Why:** With the new Experience Cloud site template, service providers can easily manage referrals, enroll clients in sessions, create schedules, track service delivery, and collaborate with caseworkers. Previously, service providers created their own portal and set up pages to do these tasks.

**How:** From Setup, in the Quick Find box, enter *Digital Experiences*, and then select **All Sites**. Click **New**, and then from the available templates, select **Service Provider Portal**.

SEE ALSO:

[Salesforce Help: Build a Service Provider Experience Cloud Site in Public Sector Solutions \(can be outdated or unavailable during release preview\)](#)

## Efficiently Capture Complete Interaction Notes by Using a Guided Flow

Caseworkers can use a single guided flow to easily capture meeting notes. Use the flow to write detailed notes, record attendees, document the date and time, add tags, and upload supporting documents. They can also share their notes with other users, and publish the approved notes to prevent any further edits. This efficient, unified workflow saves caseworkers from going to multiple pages to manage written and verbal communications.

**Where:** This change applies to Lightning Experience where Interaction Summary and Enhanced Interaction Note Interface are enabled.

**Who:** To use this feature, users need the Industries Interaction Summary permission set license.

SEE ALSO:

[Salesforce Help: New and Changed Objects in Interaction Summaries \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Set Up Interaction Summaries \(can be outdated or unavailable during release preview\)](#)

## Redetermine Benefit Eligibility When Constituents Recertify for Benefits

Provide a guided flow on your Experience Cloud site for constituents to easily recertify their circumstances to continue to receive a benefit. Then, use another guided flow to review their recertification information and supporting documents. Check their benefit eligibility and renew or adjust their assigned benefit amount as necessary.

**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 the Benefit Recertification Application Flow \(can be outdated or unavailable during release preview\)](#)

## Share Performance Indicators and Outcome Results on an Experience Cloud Site

Gain transparency and alignment by sharing your agency's strategy and results with partner organizations and funders. Collaborate with grantees to define indicators and targets, and collect indicator results from grantees, field staff, and partner organizations.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Public Sector Solutions is enabled.

**Who:** To use this feature, site users need the Outcome Management for Experience Cloud permission set.

SEE ALSO:

[Salesforce Help: Outcome Management Experience Cloud Site \(can be outdated or unavailable during release preview\)](#)

## Help Employees Do More on the Employee Experience Cloud Site

Employees can complete the assessments assigned to them, file complaints about policy violations, and take the corrective actions recommended by supervisors for any complaints filed against them. Employees can also apply for and get the benefits and assistance that they need from the organization. Supervisors can administer performance assessments and create personalized care plans for employee development. They can assign training programs to employees and track the progress of the employees through goals.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Public Sector Solutions is enabled.

**Who:** To use these capabilities, employees and supervisors need the Employee Experience For Public Sector permission set license.

SEE ALSO:

[Salesforce Help: Employee Experience for Public Sector Solutions \(can be outdated or unavailable during release preview\)](#)



## Give Inspectors a Link to More Information About a Regulatory Code

When a regulatory code is long or complex, inspectors need more information than what's included in the regulatory code's description. Use the new External URL field to add a link to an external resource where inspectors can find all the details that they need. We delivered this feature thanks to your ideas on IdeaExchange.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Public Sector Solutions is enabled.

SEE ALSO:

[IdeaExchange: Hyperlinks within Description for Regulatory Codes in Public Sector Inspections](#)

[Salesforce Help: Create Regulatory Code Records \(can be outdated or unavailable during release preview\)](#)



## Make Follow-Up Visits Easier for Inspectors by Relating Them to the Previous Visit

On a follow-up visit to an establishment, help inspectors quickly find the regulatory code violations from the previous visit, the violation enforcement actions assigned to the owner, and the items to check for compliance. We delivered this feature thanks to your ideas on IdeaExchange.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Public Sector Solutions is enabled.

SEE ALSO:

[IdeaExchange: Follow-up inspections](#)

[Salesforce Help: Create an Inspection Visit in Public Sector Solutions \(can be outdated or unavailable during release preview\)](#)

## Set Up Service Excellence Capabilities More Easily

Use a guided setup assistant to easily configure features that help caseworkers to address concerns raised by constituents and to deliver excellent customer service, including action launcher, record alerts, and identity verification. In-app links help you quickly configure required settings, while help links offer 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.

**How:** From Setup, in the Quick Find box, enter *Configure Service Excellence*, and then select **Assistant 9: Configure Service Excellence**.

## Improvement in Dynamic Assessments

Save additional information about dynamic assessments in custom fields on the Assessment object. Previously, you saved information only in the standard fields.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Public Sector Solutions is enabled.

## Set Up Licensing and Permitting Flows with Out-of-the-Box Components

Use readily available OmniStudio components in your org to set up guided flows that constituents can use to file health and safety complaints against a business or individual and to assess their license and permit needs. 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.

SEE ALSO:

[Salesforce Help: Download and Install the Licensing and Permitting Process Packages \(can be outdated or unavailable during release preview\)](#)

## Keep Your Benefit Management Flows Up to Date with the Latest Fixes and Improvements

After your org upgrades to Summer '24, deploy version v5 of the Public Sector Benefit Management Discovery Framework sample template. Then, to ensure that your flows continue to work as intended, check to see if the components that you use have a new version, and customize and activate them as necessary.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Public Sector Solutions is enabled.

SEE ALSO:

[Salesforce Help: Deploy the Benefit Management Discovery Framework Sample Template \(can be outdated or unavailable during release preview\)](#)

## New and Changed Objects in Public Sector Solutions

Do more with these new and changed objects.

### Capture an obstacle or circumstance that prevents a constituent from getting the required care or services

Use the new CareBarrier object.

### Define the types of care barriers faced by constituents

Use the new CareBarrierType object.

**Associate a care plan with a care barrier**

Use the new `CarePlanDetail` object.

**Associate a goal assignment with a care barrier**

Use the new `GoalAssignmentDetail` object.

**Specify the number of days before the recertification due date that a constituent can recertify for a benefit**

Use the new `StartRecertificationFrom` field on the existing `Benefit` object.

**Specify the approval status of a benefit schedule**

Use the new `ApprovalStatus` field on the existing `Benefit Schedule` object.

**Specify the status of a meeting note**

Use the new `MeetingNotesStatus` field on the existing `Interaction Summary` object.

**Specify the authorization status of the referral for the associated provider**

Use the new `AuthorizationStatus` field on the existing `Referral` object.

**Provide an external reference for a regulatory code**

Use the new `ExternalUrl` field on the existing `RegulatoryCode` object.

**Associate a child visit with a parent visit**

Use the new `ParentVisit` field on the existing `Visit` object.

## Metadata API

Access more metadata through these new and changed metadata types.

### Public Sector Solutions

**Configure the application to map object record types**

Use the new `ApplicationRecordTypeConfig` metadata type to configure the object record types to an application.

## Referral Marketing

Marketing managers can now design referral promotions as per the marketing or industry requirements. Reusable promotion templates enable marketing managers to decide at which stages advocates and their friends are rewarded and to customize promotion stage names. Using the refreshed referral promotion guided flow, marketing managers can select the promotion's reward and then decide the content of the promotion emails. Get the referral promotion emails ready for launch without spending much time editing the emails. Run referral promotions for your company's loyalty program. Easily track the advocate count of referral promotions.

### IN THIS SECTION:

[Design Reusable Promotion Templates Aligned with Your Business Goals](#)

Marketing managers can now use a promotion template to create multiple referral promotions that are tailored to their marketing strategy or industry needs. Update promotion stage names with names that are relevant to your brand, customers, or industry. Decide the stage and the activity that advocates and their referred friends are rewarded for. If the company doesn't want to reward advocates or their friends, even that's possible with promotion templates. A promotion's template now determines the promotion's stages, when advocates and their friends are rewarded, and the promotion's email content.

### [Make the Most of the Refreshed Referral Promotion Guided Flow](#)

The guided flow is now more intuitive and oriented to how marketing managers plan their referral promotions. In the second step of the guided flow, marketing managers can decide the promotion's reward for advocates and their friends. After marketing managers select the rewards, they can customize the promotion email content based on the selected rewards. The promotion emails and the widget are grouped based on the stage that they belong to. The content of the emails is dynamically updated based on when the promotion's template rewards advocates and their friends. In the last step of the guided flow, marketing managers can review which content assets are activated in each stage and which stages issue rewards.

### [Save Time with the Revamped Promotion Email Templates](#)

The updated referral promotion email templates automatically add the reward details in the emails corresponding to stages where advocates or their friends are rewarded. The refreshed email content ensures that marketing managers spend less time to modify the content based on the company's branding. After marketing managers select a promotion template for a promotion, the promotion template decides which emails are part of the promotion and the email content.

### [Knock Off the Hassle of Determining the Sender Email Address](#)

Your marketing managers no longer have to select an org-wide email address as the sender for referral promotion emails in orgs where Referral Marketing is integrated with your company's Marketing Cloud instance. The sender profile of a promotion's Marketing Cloud businesses unit is used for the promotion's emails.

### [Improve Referral Prediction Accuracy by Analyzing Additional Features](#)

Accurately predict the likelihood of referrals from contacts and program members by analyzing the additional member features such as mailing city, state, and contact age. Know your members better, manage costs effectively, and reduce member discontent by targeting individuals with higher referral likelihood scores.

### [Track Advocate Count as a Promotion KPI](#)

Marketing managers can now easily track the performance of a referral promotion against the company's advocate enrollment goal. View the number of advocates for a promotion in the Loyalty Program Member Promotion related list on a referral promotion. Marketing managers can also compare the advocate count across multiple promotions. Find out whether an advocate's enrollment is active from the advocate's loyalty program member promotion record from the related list.

### [Reduce Customer Acquisition Costs by Running Referral Promotions for Your Members](#)

Companies that have Referral Marketing and Loyalty Management in their org can now run referral promotions for their loyalty program. Leverage your relationship with the existing members of your loyalty program to generate referrals. Keep your loyalty members engaged by offering them rewards for their referrals.

### [Watch Referral Marketing Videos](#)

New videos help your users learn about the capabilities of Referral Marketing.

### [New and Changed Objects in Referral Marketing](#)

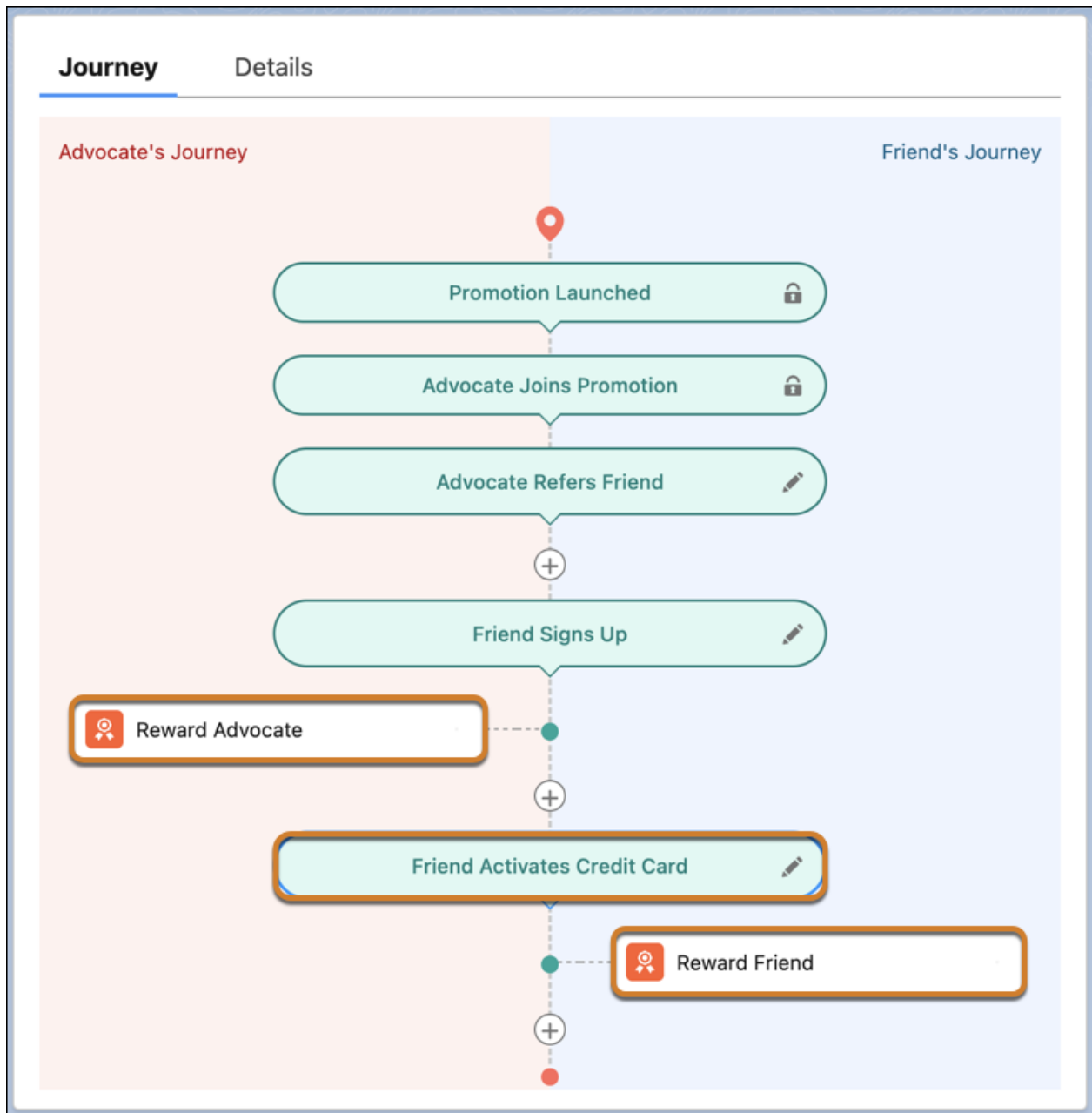
Access and manage your Referral Marketing data through these objects.

## Design Reusable Promotion Templates Aligned with Your Business Goals

Marketing managers can now use a promotion template to create multiple referral promotions that are tailored to their marketing strategy or industry needs. Update promotion stage names with names that are relevant to your brand, customers, or industry. Decide the stage and the activity that advocates and their referred friends are rewarded for. If the company doesn't want to reward advocates or their friends, even that's possible with promotion templates. A promotion's template now determines the promotion's stages, when advocates and their friends are rewarded, and the promotion's email content.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Referral Marketing is enabled.

**How:** On the Promotion Template related list of a referral program, click **New**, provide a name, and save the promotion template. On the Journey tab, edit the names of the last three stages and decide the stage when advocates and their friends are rewarded. At each stage where a reward is provided, select the eligible activity.



SEE ALSO:

[Salesforce Help: Promotion's Template](#) (can be outdated or unavailable during release preview)

## Make the Most of the Refreshed Referral Promotion Guided Flow

The guided flow is now more intuitive and oriented to how marketing managers plan their referral promotions. In the second step of the guided flow, marketing managers can decide the promotion's reward for advocates and their friends. After marketing managers select the rewards, they can customize the promotion email content based on the selected rewards. The promotion emails and the widget are grouped based on the stage that they belong to. The content of the emails is dynamically updated based on when the promotion's template rewards advocates and their friends. In the last step of the guided flow, marketing managers can review which content assets are activated in each stage and which stages issue rewards.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Referral Marketing is enabled.

**Why:** If a promotion's template doesn't reward referred friends, then the marketing manager can't select a reward for the referred friends in the second step of the guided flow. The content of the emails that are targeted towards friends doesn't mention rewards. If a promotion uses a template that rewards advocates and friends at the last stage, then the last stage's emails for both advocates and friends contain their reward details.

**Configure Referral Promotion**

Primary Information | **Rewards and Audience** | Emails and Widgets | Summary

\* Name

Description

\* Start Date  End Date

Promotion Code  Promotion Page URL

\* Referral Promotion Template  
Refer a Friend

**Key Terms to Remember**

**Advocate:**  
An existing customer who joins the promotion and refers their friends.

**Friend:**  
A person referred by an advocate to sign up.

**Reward:**  
A gift offered to advocates and their friends for participating in the referral promotion.

[Learn More in Help](#)

SEE ALSO:

[Salesforce Help: Design a Referral Promotion Using a Guided Flow \(can be outdated or unavailable during release preview\)](#)

## Save Time with the Revamped Promotion Email Templates

The updated referral promotion email templates automatically add the reward details in the emails corresponding to stages where advocates or their friends are rewarded. The refreshed email content ensures that marketing managers spend less time to modify the content based on the company's branding. After marketing managers select a promotion template for a promotion, the promotion template decides which emails are part of the promotion and the email content.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Referral Marketing is enabled.

SEE ALSO:

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

## Knock Off the Hassle of Determining the Sender Email Address

Your marketing managers no longer have to select an org-wide email address as the sender for referral promotion emails in orgs where Referral Marketing is integrated with your company's Marketing Cloud instance. The sender profile of a promotion's Marketing Cloud businesses unit is used for the promotion's emails.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Referral Marketing is enabled.

**How:** On the Marketing Cloud Integration page in Setup, admins can turn on Referral Marketing's integration with Marketing Cloud, and connect the Marketing Cloud business units.

SEE ALSO:

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

## Improve Referral Prediction Accuracy by Analyzing Additional Features

Accurately predict the likelihood of referrals from contacts and program members by analyzing the additional member features such as mailing city, state, and contact age. Know your members better, 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 Loyalty Management, and Scoring Framework are enabled.

**Who:** When you create 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 you activate the template, go to the Likelihood of Referrals dashboard in CRM Analytics.

SEE ALSO:

[Salesforce Help: Get Predictions about Contacts' Likelihood of Referring \(can be outdated or unavailable during release preview\)](#)

## Track Advocate Count as a Promotion KPI

Marketing managers can now easily track the performance of a referral promotion against the company's advocate enrollment goal. View the number of advocates for a promotion in the Loyalty Program Member Promotion related list on a referral promotion. Marketing managers can also compare the advocate count across multiple promotions. Find out whether an advocate's enrollment is active from the advocate's loyalty program member promotion record from the related list.



**Where:** This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Referral Marketing is enabled.

SEE ALSO:

[Salesforce Help: Track Advocate Count for Promotions \(can be outdated or unavailable during release preview\)](#)

## Reduce Customer Acquisition Costs by Running Referral Promotions for Your Members

Companies that have Referral Marketing and Loyalty Management in their org can now run referral promotions for their loyalty program. Leverage your relationship with the existing members of your loyalty program to generate referrals. Keep your loyalty members engaged by offering them rewards for their referrals.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Referral Marketing and Loyalty Management are enabled.

**When:** This functionality is available starting Spring '24.

**How:** From the App Launcher, find and select **Loyalty Management**. Open the loyalty program that you want to add a referral promotion to. Click **Experiences**. On the Promotions related list, click **New Referral Promotion**.

SEE ALSO:

[Salesforce Help: Run Referral Promotions As Part of the Company's Loyalty Program \(can be outdated or unavailable during release preview\)](#)

## Watch Referral Marketing Videos

New videos help your users learn about the capabilities of Referral Marketing.

- [Prepare Your Marketing Cloud Instance for Referral Marketing](#) shows how admins connect their company's Marketing Cloud instance with Referral Marketing.
- [Plan Your Promotion's Design](#) explains the key aspects of a referral promotion and how marketing managers can plan for their promotions with Referral Marketing.
- [Design a Referral Program](#) shows marketing managers how they can create a referral program and design its promotions.

## New and Changed Objects in Referral Marketing

Access and manage your Referral Marketing data through these objects.

### Create a reuseable promotion template

Use the new PromotionTemplate object.

### Create stages for a promotion template

Use the new PromotionStageTemplate object.

### Use a promotion template to create a promotion

Use the new PromotionTemplateId field on the existing Promotion object.

**Specify at which stage of a promotion's advocates and their referred friends are rewarded**

Use the new `ReferrerJournalSubTypeId` and `ReferredPartyJournalSubTypeId` fields on the existing `PromotionStage` object.

## SEE ALSO:

[Referral Marketing Developer Guide: PromotionTemplate](#) (can be outdated or unavailable during release preview)

[Referral Marketing Developer Guide: PromotionStageTemplate](#) (can be outdated or unavailable during release preview)

[Referral Marketing Developer Guide: Promotion](#) (can be outdated or unavailable during release preview)

[Referral Marketing Developer Guide: PromotionStage](#) (can be outdated or unavailable during release preview)

## Salesforce Contracts

Salesforce Contracts 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 robust contract lifecycle management is crucial to the overall health of 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](#).

## Salesforce for Education

Provide an intuitive, guided degree planning experience for your students by using Intelligent Degree Planning. Enable students to view the details of learning courses and programs, and track their progress by using new Lightning web components. Optimize the matching of mentors and mentees by using a new guided flow and comparison layout. Simplify the appointment experience with automatic resource assignments, and QR codes for onsite check-ins. Create assessments easily with intelligent suggestions from Einstein. Migrate from Admissions Connect, Student Success Hub, and Education Data Architecture to the integrated version of Education Cloud. Leverage Common App first-year data in Education Cloud.

## IN THIS SECTION:

[Help Students Determine Their Steps to Graduation with Intelligent Degree Planning](#)

Provide an intuitive, guided degree planning experience for your students. Learners can use the dynamic Intelligent Degree Planner to view their program requirements, search for eligible courses, and design their path to degree completion by session, term, and year. They can add, remove, and rearrange their courses by dragging elements in an intuitive interface and create placeholders as needed. Students can submit the completed plans for approval and see status updates as their advisor reviews the plan.

[Track Academic Advancement with Learner Progress](#)

Use the new Learner Progress component to enable learners to track their academic progress on the learner portal. Learners can view their progress on planned requirements, and stay on top of the unplanned requirements for their enrolled learning programs. Advisors can view Learner Progress as a tab on the updated case record page for the Student Success app.

[Compare and Connect Mentors with a Mentee](#)

Match a mentor with a mentee by comparing the responses to predefined fields by using the new guided flow, Mentoring: Match Mentor and Mentee. Launch the flow from the benefit assignment record page for a mentee, and compare potential mentors by using data from the new Mentoring Profile object. Select a mentor to assign them as the provider for the benefit.

### [Migrate from 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.

### [Import Your Common App Data into Education Cloud](#)

Use Data Importer for Common App to bring your Common App First-Year data into Education Cloud. You can import standard applicant, suspect, prospect, and recommender data into the applicable Education Cloud entities. You can also modify and extend the included components to import additional fields as needed.

### [Get a Quick View of Admissions Item Status](#)

Add the Admission Application Items FlexCard to the individual application record page layout to show the application items that require verification or that were rejected by a reviewer. Admissions personnel can see all education, examination, and file records that are in the unverified or rejected status.

### [Assign Appointment Resources Automatically and Efficiently](#)

Choose how resources in a success team are assigned to appointments. Configure automatic assignments and appointment distribution to efficiently manage resources based on defined appointment assignment policies.

### [Draft Questions by Using Einstein for Intake Assessments](#)

Use Intelligent Question Generator to draft assessment questions with Einstein generative AI. Select a prompt template to instantly generate relevant questions. You can provide additional context if required. Modify and use the questions to create intake assessments for support programs.

### [Use AI to Set Course and Program Expectations with Einstein Skills Generator](#)

Find skills to associate with your learning courses and learning programs in the new final step of the Learning Wizard, Einstein Skills Generator. Let Einstein suggest skills that fit the course or program based on data from the public domain and your Education Cloud org, or choose from the skills that you've used before.

### [Use QR Codes to Facilitate Check-ins](#)

Use the new QR Code component to generate QR codes for waitlist check-ins. Students can use the QR code to select a topic, and add themselves to the waitlist for an in-person appointment. They can check the status of their check-ins and position in the queue on the learner portal.

### [View Learning Details in Learning Summary](#)

Enable learners to view details of programs and courses, and the associated learning requirements on the learner portal. Staff can view Learning Summary as a tab on the updated learning program and learning course record pages.

### [Use Fundraising Updates for Advancement](#)

Provide new and easy ways to acknowledge donors, enter new recurring donations, store the seasonal addresses of constituents, understand donor behavior to positively affect outreach, and report on and build lists of donors.

### [Einstein for Fundraising \(Beta\)](#)

Use Copilot Actions Fundraising Gift Proposals to streamline and expedite writing compelling and personalized gift proposals using data in your Salesforce org. This feature is available with Einstein Copilot.

### [New and Changed Objects in Education Cloud](#)

Do more with the new and updated Education Cloud objects.

## 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 focused support to learners in your institution, such as sending an email to an advisee or logging a call to a mentee.

- [Disclosure and Compliance Hub](#)

Use Disclosure and Compliance Hub with Education Cloud to organize questions, answers, and generate reports that can be easily accessed and tracked.

- [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.

## Help Students Determine Their Steps to Graduation with Intelligent Degree Planning

Provide an intuitive, guided degree planning experience for your students. Learners can use the dynamic Intelligent Degree Planner to view their program requirements, search for eligible courses, and design their path to degree completion by session, term, and year. They can add, remove, and rearrange their courses by dragging elements in an intuitive interface and create placeholders as needed. Students can submit the completed plans for approval and see status updates as their advisor reviews the plan.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where the Education Cloud license is enabled.

**Who:** To offer Intelligent Degree Planning to your students, you need the Learner Success Experience Cloud license. Users with the Education Cloud Full Access permission set or the Education Cloud Limited Access permission set can set up the planner and create templates. Users with the Education Cloud for Experience Cloud Access permission set can access the degree planner.

SEE ALSO:

[Salesforce Help: Intelligent Degree Planning \(can be outdated or unavailable during release preview\)](#)

## Track Academic Advancement with Learner Progress

Use the new Learner Progress component to enable learners to track their academic progress on the learner portal. Learners can view their progress on planned requirements, and stay on top of the unplanned requirements for their enrolled learning programs. Advisors can view Learner Progress as a tab on the updated case record page for the Student Success app.

**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, and then add and configure the Learner Progress component by using Experience Builder.

SEE ALSO:

[Salesforce Help: Learner Progress for Learners and Staff \(can be outdated or unavailable during release preview\)](#)

## Compare and Connect Mentors with a Mentee

Match a mentor with a mentee by comparing the responses to predefined fields by using the new guided flow, Mentoring: Match Mentor and Mentee. Launch the flow from the benefit assignment record page for a mentee, and compare potential mentors by using data from the new Mentoring Profile object. Select a mentor to assign them as the provider for the benefit.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where the Education Cloud license and Mentoring are enabled.

**Who:** Users with the Education Cloud Full Access permission set can use this feature.

SEE ALSO:

[Salesforce Help: Compare and Assign Mentors Using a Screen Flow \(can be outdated or unavailable during release preview\)](#)

## Migrate from 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 use the migration kit. The Data Migration Kit is best used by advanced users (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 or custom code.

SEE ALSO:

[Salesforce Help: Migrate Your Data to Education Cloud \(can be outdated or unavailable during release preview\)](#)

## Import Your Common App Data into Education Cloud

Use Data Importer for Common App to bring your Common App First-Year data into Education Cloud. You can import standard applicant, suspect, prospect, and recommender data into the applicable Education Cloud entities. You can also modify and extend the included components to import additional fields as needed.

**Where:** Data Importer for Common App is compatible with Lightning Experience in Enterprise, Unlimited, and Developer editions where the Education Cloud license is enabled.

**When:** Data Importer for Common App is available starting June 14, 2024.

**Who:** Users with the Education Cloud Full Access permission set can use the data importer.

SEE ALSO:

[Salesforce Help: Import Common App Data Into Education Cloud \(can be outdated or unavailable during release preview\)](#)

## Get a Quick View of Admissions Item Status

Add the Admission Application Items FlexCard to the individual application record page layout to show the application items that require verification or that were rejected by a reviewer. Admissions personnel can see all education, examination, and file records that are in the unverified or rejected status.

**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, Education Cloud Limited Access, or Education Cloud Reviewer permission set can use this feature.

SEE ALSO:

[Salesforce Help: Verify, Review, and Decide on Applications \(can be outdated or unavailable during release preview\)](#)

## Assign Appointment Resources Automatically and Efficiently

Choose how resources in a success team are assigned to appointments. Configure automatic assignments and appointment distribution to efficiently manage resources based on defined appointment assignment policies.

**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:** From the App Launcher, find and select **Success Teams**, and then click **New**. Enter the details, select **Automatic** as the resource assignment type, and then save your changes.

SEE ALSO:

[Salesforce Help: Automatic Resource Assignment for Appointments \(can be outdated or unavailable during release preview\)](#)

## Draft Questions by Using Einstein for Intake Assessments

Use Intelligent Question Generator to draft assessment questions with Einstein generative AI. Select a prompt template to instantly generate relevant questions. You can provide additional context if required. Modify and use the questions to create intake assessments for support programs.

**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 Einstein in Setup. From the App Launcher, find and select **Assessment Questions**, and then click **Draft with Einstein Using Instructions**.

SEE ALSO:

[Salesforce Help: Intelligent Question Generation \(can be outdated or unavailable during release preview\)](#)

## Use AI to Set Course and Program Expectations with Einstein Skills Generator

Find skills to associate with your learning courses and learning programs in the new final step of the Learning Wizard, Einstein Skills Generator. Let Einstein suggest skills that fit the course or program based on data from the public domain and your Education Cloud org, or choose from the skills that you've used before.

**Where:** This change applies to Lightning Experience in Performance, Unlimited, and Developer editions where the Education Cloud and Einstein for Education Cloud licenses are enabled.

**Who:** Only users with the Education Cloud Full Access and Einstein for Education Cloud permission sets can use Einstein Skills Generator.

**How:** Enable Einstein AI and Einstein for Education Cloud in Setup. Then, from the app navigation menu in the Academic Operations app, select **Learning Courses** or **Learning Programs**, and then click **New from Learning Wizard**.

SEE ALSO:

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

## Use QR Codes to Facilitate Check-ins

Use the new QR Code component to generate QR codes for waitlist check-ins. Students can use the QR code to select a topic, and add themselves to the waitlist for an in-person appointment. They can check the status of their check-ins and position in the queue on the learner 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 learner portal.

**How:** From Setup, in the Quick Find box, enter *Lightning App Builder*, and then select **Lightning App Builder**. Create or edit a waitlist record page, and then add and configure the QR Code component.

SEE ALSO:

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

## View Learning Details in Learning Summary

Enable learners to view details of programs and courses, and the associated learning requirements on the learner portal. Staff can view Learning Summary as a tab on the updated learning program and learning course record pages.

**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, and then add and configure the Learning Summary component by using Experience Builder.

SEE ALSO:

[Salesforce Help: Learning Summary for Learners and Staff \(can be outdated or unavailable during release preview\)](#)

## Use Fundraising Updates for Advancement

Provide new and easy ways to acknowledge donors, enter new recurring donations, store the seasonal addresses of constituents, understand donor behavior to positively affect outreach, and report on and build lists of donors.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where the Education Cloud license and Fundraising are enabled.

**Who:** Users with the Education Cloud Full Access permission set can access Fundraising.

SEE ALSO:

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

## Einstein for Fundraising (Beta)

Use Copilot Actions Fundraising Gift Proposals to streamline and expedite writing compelling and personalized gift proposals using data in your Salesforce org. This feature is available with Einstein Copilot.

SEE ALSO:

[Draft Fundraising Gift Proposals with Einstein Copilot \(Beta\)](#)

## New and Changed Objects in Education Cloud

Do more with the new and updated Education Cloud objects.

### **Represent information about a Mentoring participant**

Use the new `MentoringProfile` object.

### **Specify the URL for a waitlist**

Use the new `Link` field on the `Waitlist` object.

### **Specify the opportunity for an academic term enrollment**

Use the new `Opportunity` field on the `AcademicTermEnrollment` object.

### **Specify the opportunity for an educational info request**

Use the new `Opportunity` field on the `EducationalInfoRequest` object.

### **Specify the opportunity for an individual application**

Use the new `Opportunity` field on the `IndividualApplication` object.

### **Specify the opportunity for a learner program**

Use the new `Opportunity` field on the `LearnerProgram` object.

### **Specify the resource assignment type for a success team**

Use the new `ResourceAssignmentType` field on the `SuccessTeam` object.

### **Specify the display name of a group of courses**

Use the new `GroupName` field on the `LearningProgramPlanRqmt` object.

### **Specify a learner program's parent learner program**

Use the new `ParentLearnerProgram` field on the `LearnerProgram` object.

### **Indicate whether an opportunity is created for expressions of interest in a learning program**

Use the new `DoesCreateOpportunityRecord` field on the `LearningProgram` object.

### **Identify a learning program as a top-level program**

Use the new `IsTopLevelProgram` field on the `LearningProgram` object.

### **Represent a template that a learner can apply to create a planned learning path**

Use the new `LearningPathwayTemplate` object.

### **Represent a junction between Learning Program Plan and Learning Pathway Template objects**

Use the new `LearningPathwayTplPgmPlan` object.



**Represent a requirement with completion details in the Learning Pathway Template**

Use the new LearningPathwayTemplateItem object.

**Represent a learner's planned path to the completion of their enrolled learning programs**

Use the new LearnerPathway object.

**Represent a requirement with completion details in the Learner Pathway**

Use the new LearnerPathwayItem object.

## SEE ALSO:

[Salesforce Help: Education Cloud Standard Objects \(can be outdated or unavailable during release preview\)](#)

## Salesforce for Nonprofits

Salesforce for Nonprofits includes platform solutions and managed packages for nonprofits. Nonprofit Cloud, built on the Salesforce platform, makes it easier to monitor fundraising efforts by using source codes, generate donor acknowledgments, manage program participation, and create cohorts of program participants.

## IN THIS SECTION:

[Nonprofit Cloud](#)

Easily store seasonal addresses. Better target your donors by using RFM scores. Quickly add new recurring donations in the gift entry flow. Quickly create individual or batch gift acknowledgments. Remove program participants from all upcoming sessions. Use program cohorts to group participants and make sure that no one slips through the cracks.

[Quickly Find Salesforce for Nonprofit Managed Package Release Information](#)

Find new links to Salesforce release notes and Known Issues in GitHub releases for the open-source Salesforce for Nonprofit managed packages. You can also take a deeper dive into the work included in a release by reviewing the recently closed pull requests.

[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

Easily store seasonal addresses. Better target your donors by using RFM scores. Quickly add new recurring donations in the gift entry flow. Quickly create individual or batch gift acknowledgments. Remove program participants from all upcoming sessions. Use program cohorts to group participants and make sure that no one slips through the cracks.

## IN THIS SECTION:

[Fundraising](#)

Nonprofit Cloud for Fundraising provides new and easy ways to acknowledge donors, enter new recurring donations, store the seasonal addresses of constituents, and evaluate donors by using RFM scoring to segment, report on, and build lists of donors. Built on the secure and trusted foundation of Salesforce, Fundraising helps you increase operational efficiency, collaboration, and adoption of best-in-class practices.

### [Program Management](#)

Group program participants by cohort to better track the results for individuals or the whole cohort. Save time with the new Program Management Home Page. Quickly remove one or more participants from all upcoming benefit sessions.

### [Nonprofit Cloud for Case Management](#)

Caseworkers can use a single guided flow to easily capture meeting notes; record attendees, the date and time, and other details; and add tags and upload documents. Case workers can also identify care barriers and create personalized care plans.

### [Nonprofit Cloud for Grantmaking](#)

Use Nonprofit Cloud for Grantmaking to create robust grant applications so that grant seekers can save their progress and quickly see what sections are left to be completed. Applicants can also add collaborators to complete various sections of the application. Track and measure the impact of your grants with Outcome Management. Invite grant recipients to report the outcomes achieved with your grant funding in Experience Cloud.

## New and Enhanced Common Features for Industries

Salesforce for Nonprofits includes access to some features that are available across clouds and products in Industries. Use these features to extend and customize Salesforce for Nonprofits based on your business needs.

- [Action Launcher](#)

Employees can quickly resolve program participants and donor requests by launching Aura components. Out-of-the-Box Deployment is renamed as Standard Deployment. Use the updated object to provide employees with Aura components through Action Launcher.

- [Actionable List Members](#)

List creators can add or remove columns in Actionable List Members. The default Record Status filter shows only the active actionable list member records to list creators. You can create bulk action configurations that include Omniscrpts. Actionable list owners can now create action plans in bulk for the selected list members, and assign tasks to various colleagues as defined in the action plan template.

- [Business Rules Engine](#)

Incorporate new logic into expression set versions efficiently by changing subexpressions in fewer clicks. Map a subexpression's variables to the local resources of the expression set that the subexpression is used in. Easily deactivate or modify the decision tables that are referenced in expression set versions. Use the Has more than one million rows option in decision tables to process large volume of rows. Save time and effort by using templates to create decision tables. Enhance the text comparison capability of your decision tables by using the Does Not Match and Contains operators.

- [Data Processing Engine](#)

Upload large amounts of data into your definition with CSV files. Use the Data Cloud runtime with extended functionality for join, filter, formula, and writeback nodes.

- [Intelligent Document Reader](#)

Introducing Intelligent Document Reader for Nonprofit Cloud. Get Intelligent Document Reader to easily extract unstructured content and tables from documents, excluding rows you need not save.

- [Timeline](#)

Configure a data graph in Timeline to show engagement events from data model objects (DMOs), including the Unified Individual DMO. Include event summaries on Timeline.

## Fundraising

Nonprofit Cloud for Fundraising provides new and easy ways to acknowledge donors, enter new recurring donations, store the seasonal addresses of constituents, and evaluate donors by using RFM scoring to segment, report on, and build lists of donors. Built on the secure and trusted foundation of Salesforce, Fundraising helps you increase operational efficiency, collaboration, and adoption of best-in-class practices.

### IN THIS SECTION:

#### [Track Campaign Success With Source Codes on Marketing Cloud Growth Campaigns](#)

Add new or existing outreach source codes to campaigns by using the campaign flow in Marketing Cloud Growth Edition to report on the success of those campaigns.

#### [Understand Donor Behavior to Develop Targeted and Effective Outreach](#)

Build custom scores based on fields from the Donor Gift Summary object that reflect Recency, Frequency, and Monetary (RFM) values. Use these values to give a cumulative RFM score for each donor. This score is viewable on the donor profile and can help determine a donor's receptivity to a campaign or appeal.

#### [Generate Gift Acknowledgments and Receipts](#)

Quickly and easily create individual transaction and end-of-the-year gift acknowledgments, individually or in a batch, and store them electronically as PDF files. Mark the transactions as acknowledged and track non-tax-deductible gift amounts. Provide constituents with a personalized acknowledgment or receipt based on a customizable template.

#### [Store and Track Multiple Addresses for Constituents](#)

Ensure that your mailed outreach directly reaches your constituents by sending the mail to the active address of the constituents. Store multiple addresses for constituents.

#### [Update More Commitments With Fundraising](#)

Include more commitments and update the information on the donor for gift commitments with the Business Process API. Use the Business Process APIs on the Postman platform. The Business Process API is an investment for partners to make faster and easier integrations with Nonprofit Cloud.

#### [Add New Recurring Gifts by Using Gift Entry](#)

Save time and effort by creating recurring gifts during the gift entry. When you enter commitments during gift entry, Salesforce creates records for the gift commitment, gift commitment schedule, gift transaction, gift transaction designation, and gift default designation.

#### [New and Changed Objects and Fields in Fundraising](#)

Do more with the new and updated objects in Nonprofit Cloud for Fundraising.

#### [New Fundraising Metadata Types](#)

Make the most of the new metadata types in Nonprofit Cloud for Fundraising.

#### [Updated Fundraising Connect APIs](#)

Make the most of the updated Fundraising Connect APIs. Connect REST APIs help customers, partners, and ISVs integrate with Salesforce software and UIs.

#### [Draft Fundraising Gift Proposals with Einstein Copilot \(Beta\)](#)

Use Copilot Actions: Fundraising Gift Proposals to streamline and expedite writing compelling and personalized gift proposals using data in your Salesforce org. This feature is available with Einstein Copilot.

## Track Campaign Success With Source Codes on Marketing Cloud Growth Campaigns

Add new or existing outreach source codes to campaigns by using the campaign flow in Marketing Cloud Growth Edition to report on the success of those campaigns.

**Where:** This change applies to Lightning Experience in Marketing Cloud Growth Edition where Nonprofit Cloud for Fundraising is enabled.

**Who:** Marketing Cloud users with the FundraisingAccess permission set can access the source codes on Marketing Cloud Growth Edition campaigns.

SEE ALSO:

[Salesforce Help: Create an Email in Marketing Cloud Growth \(can be outdated or unavailable during release preview\)](#)

## Understand Donor Behavior to Develop Targeted and Effective Outreach

Build custom scores based on fields from the Donor Gift Summary object that reflect Recency, Frequency, and Monetary (RFM) values. Use these values to give a cumulative RFM score for each donor. This score is viewable on the donor profile and can help determine a donor's receptivity to a campaign or appeal.

**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: Set Up and Configure Fundraising \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Scoring Frameworks Help Increase Fundraising Success \(can be outdated or unavailable during release preview\)](#)

## Generate Gift Acknowledgments and Receipts

Quickly and easily create individual transaction and end-of-the-year gift acknowledgments, individually or in a batch, and store them electronically as PDF files. Mark the transactions as acknowledged and track non-tax-deductible gift amounts. Provide constituents with a personalized acknowledgment or receipt based on a customizable template.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Fundraising is enabled.

**Who:** Admins with the FundraisingAccess and DocGen Designer permission sets can set up gift acknowledgments and receipts in Nonprofit Cloud for Fundraising. Users with the FundraisingAccess and DocGen User permission sets can generate gift acknowledgments and receipts in Nonprofit Cloud for Fundraising.

SEE ALSO:

[Salesforce Help: Set Up and Configure Fundraising \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Security and Permissions for Fundraising \(can be outdated or unavailable during release preview\)](#)

## Store and Track Multiple Addresses for Constituents

Ensure that your mailed outreach directly reaches your constituents by sending the mail to the active address of the constituents. Store multiple addresses for constituents.

**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 new Contact Point Address fields in Nonprofit Cloud for Fundraising.

**How:** To use the new seasonal, standardization, and change address fields, add the fields you want to use to the Contact Point Address page layout. Then apply Contact Point Address as a related list to the Person Account page layout in the Lightning App Builder.

SEE ALSO:

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

## Update More Commitments With Fundraising

Include more commitments and update the information on the donor for gift commitments with the Business Process API. Use the Business Process APIs on the Postman platform. The Business Process API is an investment for partners to make faster and easier integrations with Nonprofit Cloud.

**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.

**How:** Use the Business Process Connect API endpoints to access the Business Process API tool.

SEE ALSO:

[Salesforce Help: Fundraising Business APIs \(can be outdated or unavailable during release preview\)](#)

[Postman for Salesforce Developers: Fundraising \(can be outdated or unavailable during release preview\)](#)

## Add New Recurring Gifts by Using Gift Entry

Save time and effort by creating recurring gifts during the gift entry. When you enter commitments during gift entry, Salesforce creates records for the gift commitment, gift commitment schedule, gift transaction, gift transaction designation, and gift default designation.

**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:** Streamline the process of entering a new gift commitment by entering it as part of the gift entry of the commitment's first installment.

SEE ALSO:

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

## New and Changed Objects and Fields in Fundraising

Do more with the new and updated objects in Nonprofit Cloud for Fundraising.

### Enter new recurring gifts in Gift Entry

Use the new `IsNewRecurringGift`, `TransactionPeriod`, `TransactionInterval`, `TransactionDay`, `EffectiveStartDate`, and `ExpectedEndDate` fields on the existing Gift Entry object.

### Log constituent seasonal addresses

Use the new `LastAddressStdStatus`, `LastAddressStdDate`, `LastChangeofAddressDate`, `LastChangeofAddressStatus`, `SeasonalEndDay`, `SeasonalEndMonth`, `SeasonalStartDay`, `SeasonalStartMonth`, and `IsUndeliverable` fields on the existing ContactPointAddress object.

### Generate gift acknowledgments

Use the new `DocGenerationQueryResult` object.

**Separate the tax deductible amount from the non-tax-deductible amount of a gift**

Use the new `NonTaxDeductibleAmount` field on the existing `OutreachSourceCode` object.

**Note when an outreach message was sent**

Use the new `SendDateTime` field on the existing `OutreachSourceCode` object.

**Review a donor's RFM score**

Use the new `RecencyScore`, `FrequencyScore`, `MonetaryScore`, and `CompositeRFMScore` fields on the existing `DonorGiftSummary` object.

**Add outreach source codes to marketing emails**

For orgs with Marketing Cloud Growth Edition, use the new `OutreachSourceCode` and `IsOutreachSourceCodeEnabled` fields on the existing `ListEmail` object.

## SEE ALSO:

[Salesforce Help: Fundraising Standard Objects](#) (can be outdated or unavailable during release preview)

[Salesforce Help: Manage Program Cohorts and Cohort Members](#) (can be outdated or unavailable during release preview)

**New Fundraising Metadata Types**

Make the most of the new metadata types in Nonprofit Cloud for Fundraising.

**Configure outreach source codes for your fundraising product with a collection of UTM settings**

Use the new `UtmSource`, `UtmMedium`, and `UtmCampaign` fields on the existing `FundraisingConfig` metadata type. Introduced in API version 60.0, these fields are added to the [Fundraising Tooling API Objects](#) page of the *Nonprofit Cloud Developer Guide*.

**Configure your Fundraising RFM score**

Use the new `AffinityScoreDefinition` metadata type. Introduced in API version 61.0, this metadata object is added to the [Fundraising Metadata API Types](#) page of the *Nonprofit Cloud Developer Guide*.

## SEE ALSO:

[Developer Documentation: Fundraising Tooling API Objects](#) (can be outdated or unavailable during release preview)

[Nonprofit Cloud Developer Guide: Fundraising Metadata API Types](#) (can be outdated or unavailable during release preview)

**Updated Fundraising Connect APIs**

Make the most of the updated Fundraising Connect APIs. Connect REST APIs help customers, partners, and ISVs integrate with Salesforce software and UIs.

**Support up to 100 commitments in a single post request**

Make a POST request to the `/connect/fundraising/commitments` resource.

New request body: `Create Commitment Input`

New response body: `Create Commitment Output`

**Update information about the donor when you update the schedule or details of a gift commitment**

Make a PATCH request to the `/connect/fundraising/commitments` resource.

New request body: `Update Commitment Input`

New response body: Update Commitment

SEE ALSO:


[Salesforce Help: Fundraising Business APIs \(can be outdated or unavailable during release preview\)](#)

## Draft Fundraising Gift Proposals with Einstein Copilot (Beta)

Use Copilot Actions: Fundraising Gift Proposals to streamline and expedite writing compelling and personalized gift proposals using data in your Salesforce org. This feature is available with Einstein Copilot.

**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 Nonprofit Cloud or Education Cloud and 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:** 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:** Copilot Actions: Fundraising Gift Proposals is available to Nonprofit Cloud and Education Cloud users with the Use Einstein Copilot for Salesforce and Execute Prompt Templates user permissions.

SEE ALSO:

[Salesforce Help: Copilot Actions Fundraising Gift Proposals \(Beta\) \(can be outdated or unavailable during release preview\)](#)

## Program Management

Group program participants by cohort to better track the results for individuals or the whole cohort. Save time with the new Program Management Home Page. Quickly remove one or more participants from all upcoming benefit sessions.

IN THIS SECTION:

### [Remove Participants from Upcoming Scheduled Sessions](#)

When using Program Management, on one benefit session, you can now remove the participants from upcoming sessions in one shot. Previously, you removed participants from each benefit session.

### [Group Program Participants into Cohorts](#)

Move a group of participants through the program together to make sure that individuals don't slip through the cracks. Compare current cohorts with previous ones or an individual's progress against that of the rest of their cohort. The Program and Benefit Management Access permission set now includes access to the new Program Cohort and Program Cohort Member objects and fields.

### [Get a Comprehensive View of Your Program Delivery](#)

Use the Program Management Home Page to track if programs are moving towards their targets, see new inbound referrals, get a snapshot of your programs and benefits, and add participants to upcoming sessions.

### [New Objects in Program Management](#)

Do more with the new Program Management objects.

### [Updated Program Management Connect API](#)

Make the most of the updated Program Management Connect APIs. Connect REST APIs help customers, partners, and ISVs integrate with Salesforce software and UIs.

## Remove Participants from Upcoming Scheduled Sessions

When using Program Management, on one benefit session, you can now remove the participants from upcoming sessions in one shot. Previously, you removed participants from each benefit session.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Program Management is enabled.

SEE ALSO:

[Salesforce Help: Remove Participants from a Benefit Schedule or Benefit Session \(can be outdated or unavailable during release preview\)](#)

## Group Program Participants into Cohorts

Move a group of participants through the program together to make sure that individuals don't slip through the cracks. Compare current cohorts with previous ones or an individual's progress against that of the rest of their cohort. The Program and Benefit Management Access permission set now includes access to the new Program Cohort and Program Cohort Member objects and fields.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Program Management is enabled.

**How:** Add the new Program Cohort object to the existing Program Management console app.

SEE ALSO:

[Salesforce Help: Enable Program Management \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Manage Program Cohorts and Cohort Members \(can be outdated or unavailable during release preview\)](#)

## Get a Comprehensive View of Your Program Delivery

Use the Program Management Home Page to track if programs are moving towards their targets, see new inbound referrals, get a snapshot of your programs and benefits, and add participants to upcoming sessions.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Program Management is enabled.

**How:** Add the new Program Management Home Page to the Program Management console app.

SEE ALSO:

[Salesforce Help: Explore the Program Management App \(can be outdated or unavailable during release preview\)](#)

## New Objects in Program Management

Do more with the new Program Management objects.

### Group program participants by cohorts

Use the new ProgramCohort and ProgramCohortMember objects.

SEE ALSO:

[Salesforce Developer Documentation: Program Management Standard Objects \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Manage Program Cohorts and Cohort Members \(can be outdated or unavailable during release preview\)](#)



## Updated Program Management Connect API

Make the most of the updated Program Management Connect APIs. Connect REST APIs help customers, partners, and ISVs integrate with Salesforce software and UIs.

### Update a session and all subsequent sessions where attendance is yet to be marked

REST Reference Resource: Benefit Schedule Participants (DELETE)

New query parameter: `startingBenefitSessionId`.

SEE ALSO:

[Salesforce Developer Documentation: Benefit Schedule Participants \(DELETE\) \(can be outdated or unavailable during release preview\)](#)

## Nonprofit Cloud for Case Management

Caseworkers can use a single guided flow to easily capture meeting notes; record attendees, the date and time, and other details; and add tags and upload documents. Case workers can also identify care barriers and create personalized care plans.

- **Efficiently Capture Complete Interaction Notes by Using a Guided Flow**

Caseworkers can also share their notes with other users, and publish approved notes to prevent any further edits. This efficient, unified workflow saves caseworkers from having to navigate multiple pages to manage written and verbal communications.

- **Tackle Care Barriers with Care Plans and Goals**

Identify circumstances that prevent constituents from getting the care and services that they need. Create personalized care plans that factor in these circumstances.

IN THIS SECTION:

[Create Care Plan Tasks](#)

Create, update and get tasks for the benefits, goals and also at a care plan level.

### Create Care Plan Tasks

Create, update and get tasks for the benefits, goals and also at a care plan level.

#### Create, update, and get tasks for benefits, goals, and care plans

Introduced in API version 56.0, this API is added to the Case Management API guide.

Make a POST request to the new `/connect/careplan/care-plans/carePlanId/tasks` resource.

New request body: Create Care Plan Task Input

New response body: Create Care Plan Task

## Nonprofit Cloud for Grantmaking

Use Nonprofit Cloud for Grantmaking to create robust grant applications so that grant seekers can save their progress and quickly see what sections are left to be completed. Applicants can also add collaborators to complete various sections of the application. Track and measure the impact of your grants with Outcome Management. Invite grant recipients to report the outcomes achieved with your grant funding in Experience Cloud.

- **Effortlessly Launch Complex Grant Applications**

Grant applicants can work on an application over days or weeks in a guided manner and quickly see what sections are still incomplete.

- **Measure the Impact and Success of Grants with Outcome Management**

You can now indicate the funding opportunities and funding awards that you expect to drive outcomes. In addition, create increased visibility into your overall strategy for creating impact and alignment across your organization.

- **Securely Collaborate on Grantmaking Application Sections**

Grant applicants can securely add collaborators to help complete sections of a grant application in your Experience Cloud site.

- **Easily Add Grantmaking Permission Sets to Permission Set Groups**

Add the Grantmaking permission sets to permission set groups to use alongside custom permission sets.

- **Quickly Delete Individual Applications**

Previously, in orgs with Grantmaking enabled users set individual applications to an inactive status. Now, they can delete the records they don't need.

- **New and Changed Objects for Grantmaking**

To build complex grant applications and define and measure the impact of your grants, use the new and updated Grantmaking and Outcome Management objects and fields.

## Quickly Find Salesforce for Nonprofit Managed Package Release Information

Find new links to Salesforce release notes and Known Issues in GitHub releases for the open-source Salesforce for Nonprofit managed packages. You can also take a deeper dive into the work included in a release by reviewing the recently closed pull requests.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions with the Nonprofit Success Pack, Outbound Funds, and Program Management Module managed packages.

SEE ALSO:

[Github: NPSP Releases \(can be outdated or unavailable during release preview\)](#)

[Github: Outbound Funds Releases \(can be outdated or unavailable during release preview\)](#)

[Github: Program Management Module Releases \(can be outdated or unavailable during release preview\)](#)

## 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](#).

## Industries Common Features

Some products in Industries share features. In this release we've enhanced some of the features that help you provide excellent customer service, made updates that save you time in Business Rules Engine, extended functionality in Data Processing Engine, and much more.

### IN THIS SECTION:

#### [Action Launcher](#)

Contact center agents (CCAs) can quickly resolve customer requests by launching Aura components. Out-of-the-Box Deployment is renamed as Standard Deployment. Use the updated object to provide CCAs with Aura components through Action Launcher.

#### [Actionable List Members](#)

List creators can add or remove columns in Actionable List Members. The default Record Status filter shows only the active actionable list member records to list creators. You can create bulk action configurations that include OmniScripts. Actionable list owners can now create action plans in bulk for the selected list members, and assign tasks to various colleagues as defined in the action plan template.

#### [Business Rules Engine](#)

Incorporate new logic into expression set versions efficiently by changing subexpressions in fewer clicks. Map a subexpression's variables to the local resources of the expression set that the subexpression is used in. Easily deactivate or modify the decision tables that are referenced in expression set versions. Use the Has more than one million rows option in decision tables to process large volume of rows. Save time and effort by using templates to create decision tables. Enhance the text comparison capability of your decision tables by using the Does Not Match and Contains operators.

#### [Context Service](#)

Use context definitions as a source for mapping data. Map the nodes and attributes of a context definition to the objects in another context definition. Conveniently generate and edit input mapping for all nodes and attributes of a definition, reducing manual selection of each node. Support different mapping types with mapping intent operations.

#### [Criteria-Based Search and Filter](#)

Enhance the search experience for customers and business partners by adding Criteria-Based Search and Filter to your Experience Cloud sites. Help users visualize data by showing resources from search results in an interactive map. Provide sorting options for search results displayed as cards. Share data from search results by using the prebuilt Copy Records and Create Report actions for Criteria-Based Search and Filter.

#### [Data Processing Engine](#)

Upload large amounts of data into your definition with CSV files. Use the Data Cloud runtime with extended functionality for join, filter, formula, and writeback nodes.

#### [Einstein Summary](#)

Use Einstein Summary to quickly generate a summary of the information stored in object records. For example, a contact center agent can generate the summary of a customer interaction.

#### [Engagement \(Beta\)](#)

Einstein Copilot can now generate a summary of one or more customer interactions.

### [Grantmaking](#)

Create robust grant applications to help grant seekers save their progress and quickly see incomplete sections. Applicants can also add collaborators to complete different sections of the application. Track and measure the impact of your grants with Outcome Management. Ask grant recipients to report the outcomes of your grant funding in Experience Cloud.

### [Industry Integration Solutions](#)

Deploy the prebuilt industry integrations to CloudHub 2.0 shared spaces supported by MuleSoft Automation Services. Additionally, you can choose to hide the values of configuration parameters during the deployment process.

### [Intelligent Document Reader](#)

Get Intelligent Document Reader to easily extract unstructured content and tables from documents, excluding rows you need not save.

### [Intelligent Form Reader](#)

Get Intelligent Form Reader to easily extract unstructured content and tables from documents, excluding rows you need not save.

### [Interaction Summaries](#)

Easily capture detailed notes of meetings and interactions by using a single, unified flow.

### [List Builder for Data Cloud Segment](#)

The records removed from a Data Cloud segment get suppressed in the associated actionable list.

### [Rollup Definitions for Record Rollups](#)

Use the Record Rollup Definitions feature to streamline the aggregation of records from various objects or groups and to provide a consolidated view of your data.

### [Scoring Framework](#)

Use Scoring Framework, a CRM Analytics-based framework, to easily and quickly build and deploy propensity models for multiple Industries clouds use cases using clicks instead of code. Define template configurations for your scoring use cases to create CRM Analytics apps, Einstein Discovery models, and recipes.

### [Service Process Studio](#)

You can now integrate Service Process Studio with Product Catalog Management to enable controlled access for service processes.

### [Stage Management](#)

With Stage Management, simplify complex business processes with greater visibility and control.

### [Timeline](#)

Configure a data graph in Timeline to show engagement events from data model objects (DMOs), including the Unified Individual DMO. Include event summaries on Timeline.

## Action Launcher

Contact center agents (CCAs) can quickly resolve customer requests by launching Aura components. Out-of-the-Box Deployment is renamed as Standard Deployment. Use the updated object to provide CCAs with Aura components through Action Launcher.

### IN THIS SECTION:

#### [Provide Prompt Customer Service by Quickly Launching Aura Components](#)

Contact center agents can easily find and launch Aura components through Action Launcher. The Aura components are just a search and click away through Action Launcher.

#### [Experience Improved Clarity with the Renamed Out-of-the-Box Deployment Feature](#)

Standard Deployment is the new name for the Out-of-the-Box Deployment feature. This change doesn't alter the feature's functionality, but the new name aligns better with the feature's purpose.

### [Changed Object in Action Launcher](#)

Include Aura components in Action Launcher deployments with the updated object.

SEE ALSO:

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

## Provide Prompt Customer Service by Quickly Launching Aura Components

Contact center agents can easily find and launch Aura components through Action Launcher. The Aura components 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:** When you create a deployment, select the Aura components that you want to include in the deployment.

## Experience Improved Clarity with the Renamed Out-of-the-Box Deployment Feature

Standard Deployment is the new name for the Out-of-the-Box Deployment feature. This change doesn't alter the feature's functionality, but the new name aligns better with the feature's purpose.

**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.

## Changed Object in Action Launcher

Include Aura components in Action Launcher deployments with the updated object.

### **Indicate whether the record actions deployment includes components**

Use the new `Components` field on the `RecordActionDeployment` object.

## Actionable List Members

List creators can add or remove columns in Actionable List Members. The default Record Status filter shows only the active actionable list member records to list creators. You can create bulk action configurations that include OmniScripts. Actionable list owners can now create action plans in bulk for the selected list members, and assign tasks to various colleagues as defined in the action plan template.

IN THIS SECTION:

### [Add or Remove Columns in Actionable List Members to View Relevant Information](#)

List creators can customize the table in Actionable List Members to suit their specific needs. The customization helps list creators focus on the relevant data and work efficiently.

### [Improve the Efficiency of List Creators with the Record Status Filter](#)

With the new default Record Status filter, list creators can immediately focus on the active actionable list member records without applying the filter each time. The filter hides the suppressed and inactive actionable list member records.

### [Streamline the List Creator Workflow with Contextual OmniScripts on Bulk Action Panel](#)

Improve the productivity of list creators by including OmniScripts in bulk action configurations. The bulk action configurations integrate with actionable lists to show list-specific OmniScripts on Bulk Action Panel.

### [Save Time and Improve Efficiency with Bulk Action Plans](#)

Generate action plans in bulk for your selected actionable list members. List creators can focus on high-value and strategic activities because they can avoid the tedious and time-consuming task of creating individual action plans for every target on a list.

## Add or Remove Columns in Actionable List Members to View Relevant Information

List creators can customize the table in Actionable List Members to suit their specific needs. The customization helps list creators focus on the relevant data and work efficiently.

**Where:** This change applies to Lightning Experience in clouds where Actionable List Members is available.

**Who:** To customize the table in Actionable List Members, administrators need the Industry Sales Excellence add-on license and the Actionable Segmentation permission set.

**How:** To add or remove columns, click  in Actionable List Members.

## Improve the Efficiency of List Creators with the Record Status Filter

With the new default Record Status filter, list creators can immediately focus on the active actionable list member records without applying the filter each time. The filter hides the suppressed and inactive actionable list member records.

**Where:** This change applies to Lightning Experience in clouds where Actionable List Members is available.

**Who:** To use the Record Status filter in Actionable List Members, list creators need the Industry Sales Excellence add-on license and the Actionable Segmentation permission set.

**How:** To see the Record Status filter applied by default, list creators must open an actionable list from the Actionable List list view.

## Streamline the List Creator Workflow with Contextual OmniScripts on Bulk Action Panel

Improve the productivity of list creators by including OmniScripts in bulk action configurations. The bulk action configurations integrate with actionable lists to show list-specific OmniScripts on Bulk Action Panel.

**Where:** This change applies to Lightning Experience in clouds where Actionable List Members is available.

**Who:** To create bulk action configurations, you need the Industry Sales Excellence add-on license and the Actionable Segmentation permission set.

**How:** When you create a bulk action configuration, select the objects and the associated OmniScripts that you want to include in the configuration, and then select the OmniScripts that you want to show on Bulk Action Panel.

## Save Time and Improve Efficiency with Bulk Action Plans

Generate action plans in bulk for your selected actionable list members. List creators can focus on high-value and strategic activities because they can avoid the tedious and time-consuming task of creating individual action plans for every target on a list.

**Where:** This change applies to Lightning Experience in clouds where Actionable List Members is available.

**How:** Select an actionable list. Then, select the list member records in the Actionable List Members component. To create action plans for the selected records, click **Create and Assign Action Plan**.

SEE ALSO:

[Salesforce Help: Create Action Plans by Using Prebuilt Bulk Action](#)

## Business Rules Engine

Incorporate new logic into expression set versions efficiently by changing subexpressions in fewer clicks. Map a subexpression's variables to the local resources of the expression set that the subexpression is used in. Easily deactivate or modify the decision tables that are referenced in expression set versions. Use the Has more than one million rows option in decision tables to process large volume of rows. Save time and effort by using templates to create decision tables. Enhance the text comparison capability of your decision tables by using the Does Not Match and Contains operators.

### IN THIS SECTION:

#### [Replace and Delete Subexpressions in Expression Sets Easily](#)

Incorporate new logic into expression set versions efficiently with fewer clicks. Replace or delete subexpressions from expression set versions without manually deleting the steps that reference the subexpression's variables. The replaced subexpression's input variables that match the old subexpression's variables are automatically reused. You can fix any errors that are shown in subsequent expression set version steps that reference the old subexpression's variables.

#### [Map Subexpression Variables to Expression Set Resources Efficiently](#)

Enjoy the flexibility to use expression set resources, and develop more meaningful expression set versions. After you add a subexpression to an expression set version, map the subexpression's input and output variables to the local resources of the expression set version.

#### [Use Boolean Data Type in Expression Set Constants](#)

Simplify rule processing by adding constants of the Boolean data type in expression set versions.

#### [Troubleshoot Large Expression Sets Easily](#)

Use the increased default length of explainability messages to show your users more detailed explanations for why an expression set version step returned a particular result.

#### [Change Decision Tables Used in Expression Sets Effortlessly](#)

Modify decision tables that are referenced in expression set versions with fewer clicks. Refresh the expression set builder to synchronize with the changes in the decision table columns such as addition, deletion, or data type changes. This update helps you use decision tables to incorporate changes in business rules without a significant downtime, making it business as usual.

#### [Easily Create Decision Tables by using Templates](#)

Save time and effort in creating a decision table by using industry-specific templates. Use these templates to quickly create a decision table based on your business requirement, instead of creating it from scratch. The templates are available in your Salesforce org only if your Industries solution has shipped it.

#### [Enhance your Decision Table Logic by using the Does Not Match and Contains Operators](#)

Enhance the text comparison capability of your decision tables by using the Does Not Match and Contains operators. Use the Does Not Match operator to retrieve an output if the query value doesn't contain the exact value or a subset of the value in the table's input cell. Use the Contains operator to retrieve an output if the input cell value is an exact match or subset of the value that you look up.

#### [Create Decision Tables that Support Large Number of Rows \(Pilot\)](#)

When you create a decision table, select the Has more than one million rows option to indicate that a decision table has more than 100,000 rows. Previously, decision tables supported up to 100,000 rows. With this option you can have up to 2,000,000 rows in your decision table.

#### [Changed Business Rules Engine Objects](#)

Do more with these changed objects in Business Rules Engine.

## Replace and Delete Subexpressions in Expression Sets Easily

Incorporate new logic into expression set versions efficiently with fewer clicks. Replace or delete subexpressions from expression set versions without manually deleting the steps that reference the subexpression's variables. The replaced subexpression's input variables that match the old subexpression's variables are automatically reused. You can fix any errors that are shown in subsequent expression set version steps that reference the old subexpression's variables.

**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: Tips to Work with Subexpressions \(can be outdated or unavailable during release preview\)](#)

## Map Subexpression Variables to Expression Set Resources Efficiently

Enjoy the flexibility to use expression set resources, and develop more meaningful expression set versions. After you add a subexpression to an expression set version, map the subexpression's input and output variables to the local resources of the expression set version.

**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: Tips to Work with Subexpressions \(can be outdated or unavailable during release preview\)](#)

## Use Boolean Data Type in Expression Set Constants

Simplify rule processing by adding constants of the Boolean data type in expression set versions.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions for Industries clouds where Business Rules Engine is enabled.

SEE ALSO:

[Salesforce Help: Supported Data Types in Expression Sets \(can be outdated or unavailable during release preview\)](#)

## Troubleshoot Large Expression Sets Easily

Use the increased default length of explainability messages to show your users more detailed explanations for why an expression set version step returned a particular result.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions for Industries clouds where Business Rules Engine and Decision Explorer are enabled.

**Who:** Users with the Rule Engine Designer permission set can define explainability messages in expression set version steps.

SEE ALSO:

[Salesforce Help: Show Rule Explanations to Users \(can be outdated or unavailable during release preview\)](#)



## Change Decision Tables Used in Expression Sets Effortlessly

Modify decision tables that are referenced in expression set versions with fewer clicks. Refresh the expression set builder to synchronize with the changes in the decision table columns such as addition, deletion, or data type changes. This update helps you use decision tables to incorporate changes in business rules without a significant downtime, making it business as usual.

**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: Tips to Manage Decision Tables \(can be outdated or unavailable during release preview\)](#)

## Easily Create Decision Tables by using Templates

Save time and effort in creating a decision table by using industry-specific templates. Use these templates to quickly create a decision table based on your business requirement, instead of creating it from scratch. The templates are available in your Salesforce org only if your Industries solution has shipped it.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions for Industries clouds where Business Rules Engine is enabled.

## Enhance your Decision Table Logic by using the Does Not Match and Contains Operators

Enhance the text comparison capability of your decision tables by using the Does Not Match and Contains operators. Use the Does Not Match operator to retrieve an output if the query value doesn't contain the exact value or a subset of the value in the table's input cell. Use the Contains operator to retrieve an output if the input cell value is an exact match or subset of the value that you look up.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions for Industries clouds where Business Rules Engine is enabled.

**How:** You can use these operators when you configure the Column Logic in a decision table.

SEE ALSO:


[Salesforce Help: Does Not Match Operator in Decision Tables \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Contains Operator in Decision Tables \(can be outdated or unavailable during release preview\)](#)

## Create Decision Tables that Support Large Number of Rows (Pilot)

When you create a decision table, select the Has more than one million rows option to indicate that a decision table has more than 100,000 rows. Previously, decision tables supported up to 100,000 rows. With this option you can have up to 2,000,000 rows in your decision table.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions for Industries clouds where Business Rules Engine 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. 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 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 the use of this feature is at your sole risk.

## Changed Business Rules Engine Objects

Do more with these changed objects in Business Rules Engine.

### Specifies the scale of the input that an expression set processes

Use the new `ExecutionScale` field in the `ExpressionSet` and `ExpressionSetDefinition` objects.

### Specifies the label of the usage type that's associated with an expression set template

Use the new `UsageTypeLabel` field in the `ExpressionSetView` object.

## Context Service

Use context definitions as a source for mapping data. Map the nodes and attributes of a context definition to the objects in another context definition. Conveniently generate and edit input mapping for all nodes and attributes of a definition, reducing manual selection of each node. Support different mapping types with mapping intent operations.

### IN THIS SECTION:

#### [Automatically Map Context Definition to Standard Objects](#)

Make use of the enhanced user experience to map Salesforce objects. Previously, you selected from a Mapping Type dropdown, and left the field blank to map your context definition manually.

#### [Generate Input Mapping Easily for Context Definitions](#)

Avoid the manual selection of each node and attribute to generate input mapping. You can now edit the input mapping name. Previously, to generate input mapping, you used Automatic Input Schema Mapping on the Add Mapping page.

#### [Specify Context Mapping Intent to Use Different Mapping Types](#)

Perform the Association, Hydration, Persistence and Translation operations to support one-to-one, one-to-many, many-to-one, and cross attribute mappings. Based on the intent operation you select, the mapping type changes. Previously, only one-to-one attribute mapping was available to perform the Hydration and Persistence operation.

#### [Use Context Definitions as Mapping Data Source](#)

Map a context definition to other context definitions to retrieve data from a definition. Previously, you selected from Salesforce objects to fetch data from standard objects.

#### [New Objects in Context Service](#)

Do more with these new Context Service objects.

#### [Metadata API](#)

Access more metadata through these new and changed metadata types.

#### [Connect REST APIs](#)

Learn more about the updates to the Connect REST APIs in Context Service.

#### [Context Namespace](#)

The `Context` namespace is used to manage the sharing and consumption of business application data by using Context Service. It has this new class and these methods.

## Automatically Map Context Definition to Standard Objects

Make use of the enhanced user experience to map Salesforce objects. Previously, you selected from a Mapping Type dropdown, and left the field blank to map your context definition manually.

**Where:** This change applies to Lightning Experience in Professional, Enterprise, Unlimited, and Developer editions for Industries clouds where Context Service is enabled.

**How:** To map your definition to standard objects, select **Automatic Salesforce Object**


The screenshot shows the 'Add Context Mapping' dialog box. The title is 'Add Context Mapping'. Under the heading 'Mapping Definition Details', there are three input fields: a 'Name' field (required, indicated by a red asterisk), a 'Description' field, and a checkbox for 'Automatic Salesforce Object Mapping' which is highlighted with a red rectangular box. Below this is another checkbox for 'Mark as Default'. At the bottom of the dialog, there is a progress bar with a blue circle on the left, a 'Cancel' button, and a 'Next' button.

Mapping.

## Generate Input Mapping Easily for Context Definitions

Avoid the manual selection of each node and attribute to generate input mapping. You can now edit the input mapping name. Previously, to generate input mapping, you used Automatic Input Schema Mapping on the Add Mapping page.

**Where:** This change applies to Lightning Experience in Professional, Enterprise, Unlimited, and Developer editions for Industries clouds where Context Service is enabled.

**How:** Open the context definition that you want to add input mapping to. On the Context Definition Details page, click the **Map Data** tab. Click , and select **Input Mapping**. On the Edit Mapping page, click **Generate All Mappings**.

**Edit Mapping**

To generate all node mappings at once, click **Generate All Mappings**

| Nodes                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               | SALESTRANSACTION                                                                                                                                                                                                                                                                                                                                             |                           |                           |               |   |   |   |                  |                  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |                |   |               |   |   |   |                        |                        |   |   |                      |                      |   |   |         |         |   |   |              |              |   |   |             |             |   |   |           |           |   |   |               |               |   |   |                 |                 |   |   |               |               |    |   |             |             |    |   |          |          |    |   |        |        |    |   |                    |                    |    |   |                       |                       |    |   |                           |                           |    |   |              |              |
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| <ul style="list-style-type: none"> <li>▼ SalesTransaction Inherited</li> <li>  SalesTransactionAction Inherited</li> <li>▼ SalesTransactionItem Inherited</li> <li>  SalesTrxnAdjustmentGroup Inherited</li> <li>  SalesTransactionItemDetail Inherited</li> <li>  SalesTrxnItemRelationship Inherited</li> <li>  SItemPromotionAdjustment Inherited</li> <li>  SalesTransactionItemTax Inherited</li> <li>  SalesTransactionItemAttribute Inherited</li> <li>  ContributorPriceDetail Inherited</li> <li>  AppUsageAssignment Inherited</li> </ul> | <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 5%;">Node Name</th> <th style="width: 15%;">▼</th> <th style="width: 15%;">Input Mapping</th> <th style="width: 15%;">▼</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>↓</td> <td>SalesTransaction</td> <td>SalesTransaction</td> </tr> </tbody> </table> | Node Name                 | ▼                         | Input Mapping | ▼ | 1 | ↓ | SalesTransaction | SalesTransaction | <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 15%;">Attribute Name</th> <th style="width: 15%;">▼</th> <th style="width: 15%;">Input Mapping</th> <th style="width: 15%;">▼</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>↓</td> <td>SalesTransactionSource</td> <td>SalesTransactionSource</td> </tr> <tr> <td>2</td> <td>↓</td> <td>SalesTransactionName</td> <td>SalesTransactionName</td> </tr> <tr> <td>3</td> <td>↓</td> <td>Account</td> <td>Account</td> </tr> <tr> <td>4</td> <td>↓</td> <td>QuoteAccount</td> <td>QuoteAccount</td> </tr> <tr> <td>5</td> <td>↓</td> <td>Opportunity</td> <td>Opportunity</td> </tr> <tr> <td>6</td> <td>↓</td> <td>Pricebook</td> <td>Pricebook</td> </tr> <tr> <td>7</td> <td>↓</td> <td>EffectiveDate</td> <td>EffectiveDate</td> </tr> <tr> <td>8</td> <td>↓</td> <td>CurrencyIsoCode</td> <td>CurrencyIsoCode</td> </tr> <tr> <td>9</td> <td>↓</td> <td>BillToContact</td> <td>BillToContact</td> </tr> <tr> <td>10</td> <td>↓</td> <td>TotalAmount</td> <td>TotalAmount</td> </tr> <tr> <td>11</td> <td>↓</td> <td>Subtotal</td> <td>Subtotal</td> </tr> <tr> <td>12</td> <td>↓</td> <td>Status</td> <td>Status</td> </tr> <tr> <td>13</td> <td>↓</td> <td>TotalProductAmount</td> <td>TotalProductAmount</td> </tr> <tr> <td>14</td> <td>↓</td> <td>TotalAdjustmentAmount</td> <td>TotalAdjustmentAmount</td> </tr> <tr> <td>15</td> <td>↓</td> <td>TotalAdjustmentDistAmount</td> <td>TotalAdjustmentDistAmount</td> </tr> <tr> <td>16</td> <td>↓</td> <td>BillToStreet</td> <td>BillToStreet</td> </tr> </tbody> </table> | Attribute Name | ▼ | Input Mapping | ▼ | 1 | ↓ | SalesTransactionSource | SalesTransactionSource | 2 | ↓ | SalesTransactionName | SalesTransactionName | 3 | ↓ | Account | Account | 4 | ↓ | QuoteAccount | QuoteAccount | 5 | ↓ | Opportunity | Opportunity | 6 | ↓ | Pricebook | Pricebook | 7 | ↓ | EffectiveDate | EffectiveDate | 8 | ↓ | CurrencyIsoCode | CurrencyIsoCode | 9 | ↓ | BillToContact | BillToContact | 10 | ↓ | TotalAmount | TotalAmount | 11 | ↓ | Subtotal | Subtotal | 12 | ↓ | Status | Status | 13 | ↓ | TotalProductAmount | TotalProductAmount | 14 | ↓ | TotalAdjustmentAmount | TotalAdjustmentAmount | 15 | ↓ | TotalAdjustmentDistAmount | TotalAdjustmentDistAmount | 16 | ↓ | BillToStreet | BillToStreet |
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| 3                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   | ↓                                                                                                                                                                                                                                                                                                                                                            | Account                   | Account                   |               |   |   |   |                  |                  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |                |   |               |   |   |   |                        |                        |   |   |                      |                      |   |   |         |         |   |   |              |              |   |   |             |             |   |   |           |           |   |   |               |               |   |   |                 |                 |   |   |               |               |    |   |             |             |    |   |          |          |    |   |        |        |    |   |                    |                    |    |   |                       |                       |    |   |                           |                           |    |   |              |              |
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| 5                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   | ↓                                                                                                                                                                                                                                                                                                                                                            | Opportunity               | Opportunity               |               |   |   |   |                  |                  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |                |   |               |   |   |   |                        |                        |   |   |                      |                      |   |   |         |         |   |   |              |              |   |   |             |             |   |   |           |           |   |   |               |               |   |   |                 |                 |   |   |               |               |    |   |             |             |    |   |          |          |    |   |        |        |    |   |                    |                    |    |   |                       |                       |    |   |                           |                           |    |   |              |              |
| 6                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   | ↓                                                                                                                                                                                                                                                                                                                                                            | Pricebook                 | Pricebook                 |               |   |   |   |                  |                  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |                |   |               |   |   |   |                        |                        |   |   |                      |                      |   |   |         |         |   |   |              |              |   |   |             |             |   |   |           |           |   |   |               |               |   |   |                 |                 |   |   |               |               |    |   |             |             |    |   |          |          |    |   |        |        |    |   |                    |                    |    |   |                       |                       |    |   |                           |                           |    |   |              |              |
| 7                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   | ↓                                                                                                                                                                                                                                                                                                                                                            | EffectiveDate             | EffectiveDate             |               |   |   |   |                  |                  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |                |   |               |   |   |   |                        |                        |   |   |                      |                      |   |   |         |         |   |   |              |              |   |   |             |             |   |   |           |           |   |   |               |               |   |   |                 |                 |   |   |               |               |    |   |             |             |    |   |          |          |    |   |        |        |    |   |                    |                    |    |   |                       |                       |    |   |                           |                           |    |   |              |              |
| 8                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   | ↓                                                                                                                                                                                                                                                                                                                                                            | CurrencyIsoCode           | CurrencyIsoCode           |               |   |   |   |                  |                  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |                |   |               |   |   |   |                        |                        |   |   |                      |                      |   |   |         |         |   |   |              |              |   |   |             |             |   |   |           |           |   |   |               |               |   |   |                 |                 |   |   |               |               |    |   |             |             |    |   |          |          |    |   |        |        |    |   |                    |                    |    |   |                       |                       |    |   |                           |                           |    |   |              |              |
| 9                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   | ↓                                                                                                                                                                                                                                                                                                                                                            | BillToContact             | BillToContact             |               |   |   |   |                  |                  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |                |   |               |   |   |   |                        |                        |   |   |                      |                      |   |   |         |         |   |   |              |              |   |   |             |             |   |   |           |           |   |   |               |               |   |   |                 |                 |   |   |               |               |    |   |             |             |    |   |          |          |    |   |        |        |    |   |                    |                    |    |   |                       |                       |    |   |                           |                           |    |   |              |              |
| 10                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | ↓                                                                                                                                                                                                                                                                                                                                                            | TotalAmount               | TotalAmount               |               |   |   |   |                  |                  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |                |   |               |   |   |   |                        |                        |   |   |                      |                      |   |   |         |         |   |   |              |              |   |   |             |             |   |   |           |           |   |   |               |               |   |   |                 |                 |   |   |               |               |    |   |             |             |    |   |          |          |    |   |        |        |    |   |                    |                    |    |   |                       |                       |    |   |                           |                           |    |   |              |              |
| 11                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | ↓                                                                                                                                                                                                                                                                                                                                                            | Subtotal                  | Subtotal                  |               |   |   |   |                  |                  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |                |   |               |   |   |   |                        |                        |   |   |                      |                      |   |   |         |         |   |   |              |              |   |   |             |             |   |   |           |           |   |   |               |               |   |   |                 |                 |   |   |               |               |    |   |             |             |    |   |          |          |    |   |        |        |    |   |                    |                    |    |   |                       |                       |    |   |                           |                           |    |   |              |              |
| 12                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | ↓                                                                                                                                                                                                                                                                                                                                                            | Status                    | Status                    |               |   |   |   |                  |                  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |                |   |               |   |   |   |                        |                        |   |   |                      |                      |   |   |         |         |   |   |              |              |   |   |             |             |   |   |           |           |   |   |               |               |   |   |                 |                 |   |   |               |               |    |   |             |             |    |   |          |          |    |   |        |        |    |   |                    |                    |    |   |                       |                       |    |   |                           |                           |    |   |              |              |
| 13                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | ↓                                                                                                                                                                                                                                                                                                                                                            | TotalProductAmount        | TotalProductAmount        |               |   |   |   |                  |                  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |                |   |               |   |   |   |                        |                        |   |   |                      |                      |   |   |         |         |   |   |              |              |   |   |             |             |   |   |           |           |   |   |               |               |   |   |                 |                 |   |   |               |               |    |   |             |             |    |   |          |          |    |   |        |        |    |   |                    |                    |    |   |                       |                       |    |   |                           |                           |    |   |              |              |
| 14                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | ↓                                                                                                                                                                                                                                                                                                                                                            | TotalAdjustmentAmount     | TotalAdjustmentAmount     |               |   |   |   |                  |                  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |                |   |               |   |   |   |                        |                        |   |   |                      |                      |   |   |         |         |   |   |              |              |   |   |             |             |   |   |           |           |   |   |               |               |   |   |                 |                 |   |   |               |               |    |   |             |             |    |   |          |          |    |   |        |        |    |   |                    |                    |    |   |                       |                       |    |   |                           |                           |    |   |              |              |
| 15                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | ↓                                                                                                                                                                                                                                                                                                                                                            | TotalAdjustmentDistAmount | TotalAdjustmentDistAmount |               |   |   |   |                  |                  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |                |   |               |   |   |   |                        |                        |   |   |                      |                      |   |   |         |         |   |   |              |              |   |   |             |             |   |   |           |           |   |   |               |               |   |   |                 |                 |   |   |               |               |    |   |             |             |    |   |          |          |    |   |        |        |    |   |                    |                    |    |   |                       |                       |    |   |                           |                           |    |   |              |              |
| 16                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | ↓                                                                                                                                                                                                                                                                                                                                                            | BillToStreet              | BillToStreet              |               |   |   |   |                  |                  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |                |   |               |   |   |   |                        |                        |   |   |                      |                      |   |   |         |         |   |   |              |              |   |   |             |             |   |   |           |           |   |   |               |               |   |   |                 |                 |   |   |               |               |    |   |             |             |    |   |          |          |    |   |        |        |    |   |                    |                    |    |   |                       |                       |    |   |                           |                           |    |   |              |              |

## Specify Context Mapping Intent to Use Different Mapping Types

Perform the Association, Hydration, Persistence and Translation operations to support one-to-one, one-to-many, many-to-one, and cross attribute mappings. Based on the intent operation you select, the mapping type changes. Previously, only one-to-one attribute mapping was available to perform the Hydration and Persistence operation.

**Where:** This change applies to Lightning Experience in Professional, Enterprise, Unlimited, and Developer editions for Industries clouds where Context Service is enabled.

**How:** Open the context definition that you want to add the mapping to. On the Context Definition Details page, click the **Map Data** tab. Click **Add Mapping**. On the Add Context Mapping window, enter **Name**, click **Next**. On the Mapping Intent Details window, select the mapping intent operation.

**Add Context Mapping**

**Mapping Intent Details**  
Your Data mapping intent would determine which mapping type would be supported.

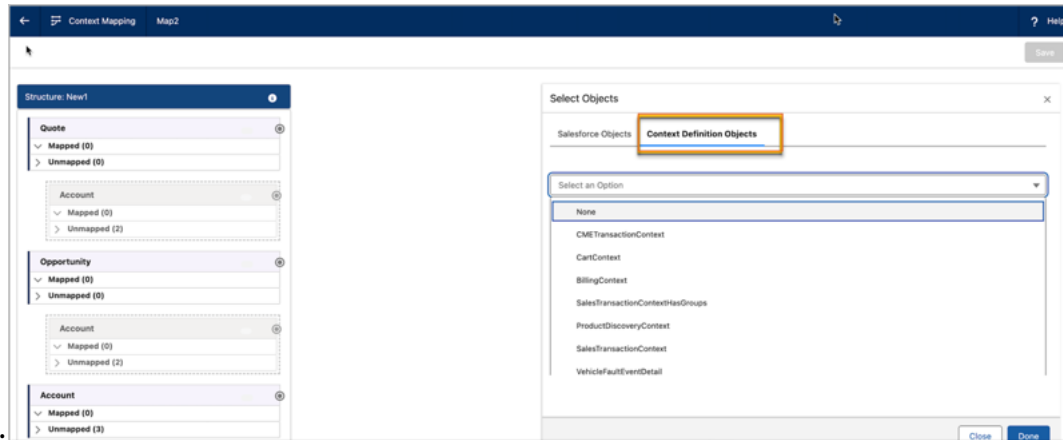
| Mapping Intent                                      | Supported Mapping                                                                                                          |
|-----------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------|
| <input type="checkbox"/> Association: Metadata Only | <input checked="" type="checkbox"/> One to One Attribute Mapping<br><input type="checkbox"/> One to Many Attribute Mapping |
| <input checked="" type="checkbox"/> Hydration       | <input checked="" type="checkbox"/> Many to One Attribute Mapping                                                          |
| <input type="checkbox"/> Persistence                | <input type="checkbox"/> Cross Attributes Mappings                                                                         |
| <input type="checkbox"/> Translation                |                                                                                                                            |

## Use Context Definitions as Mapping Data Source

Map a context definition to other context definitions to retrieve data from a definition. Previously, you selected from Salesforce objects to fetch data from standard objects.

**Where:** This change applies to Lightning Experience in Professional, Enterprise, Unlimited, and Developer editions for Industries clouds where Context Service is enabled.

**How:** On the Context Definition Objects tab, select the definition that you want to map, and click



Done.

## New Objects in Context Service

Do more with these new Context Service objects.

### Indicates the user intent of the context mapping

Use the new `ContextMappingIntent` object.

### Stores information for context to context mapping

Use the new `CtxAttrHydrationCtx` object.

## Metadata API

Access more metadata through these new and changed metadata types.

## Context Service

### Map context attributes and specify inheritance for context attribute mappings

Use the new `ctxAttrHydrationCtxs` and `inheritedFrom` fields on the existing `ContextAttributeMapping` metadata subtype of the `ContextDefinition` metadata type. Introduced in API version 60.0, this field has been added to the *Industries Common Resource Developer Guide*.

### Specify inheritance for context attributes

Use the new `inheritedFrom` field on the existing `ContextAttribute` metadata subtype of the `ContextDefinition` metadata type. Introduced in API version 60.0, this field has been added to the *Industries Common Resource Developer Guide*.

### Define context attributes with aggregate field type

Use the new `aggregate` value in the existing `fieldType` field on the existing `ContextAttribute` metadata subtype of the `ContextDefinition` metadata type. Introduced in API version 60.0, this field has been added to the *Industries Common Resource Developer Guide*.

**Identify the activation status of the context definition version**

Use the new `isActive` field on the existing `ContextDefinitionVersion` metadata subtype of the `ContextDefinition` metadata type. Introduced in API version 60.0, this field has been added to the *Industries Common Resource Developer Guide*.

**Update purpose and inheritance details in context mappings**

Use the new `contextMappingIntents` and `inheritedFrom` fields on the existing `ContextMapping` metadata subtype of the `ContextDefinition` metadata type. Introduced in API version 60.0, this field has been added to the *Industries Common Resource Developer Guide*.

**Specify context-to-context mapping and inheritance for context node mappings**

Use the new `mappedContextDefinition` and `inheritedFrom` fields on the existing `ContextNodeMapping` metadata subtype of the `ContextDefinition` metadata type. Introduced in API version 60.0, this field has been added to the *Industries Common Resource Developer Guide*.

**Map canonical nodes, define attribute dictionaries, and specify display names and inheritance in context nodes**

Use the new `canonicalNode`, `contextNodeAttrDictionaries`, `displayName`, and `inheritedFrom` fields on the existing `ContextNode` metadata subtype of the `ContextDefinition` metadata type. Introduced in API version 60.0, this field has been added to the *Industries Common Resource Developer Guide*.

**Specify inheritance for context tag**

Use the new `inheritedFrom` fields on the existing `ContextTag` metadata subtype of the `ContextDefinition` metadata type. Introduced in API version 60.0, this field has been added to the *Industries Common Resource Developer Guide*.

**Specify inheritance for context attribute hydration detail**

Use the new `inheritedFrom` fields on the existing `ContextAttrHydrationDetail` metadata subtype of `ContextDefinition` metadata type. Introduced in API version 60.0, this field has been added to the *Industries Common Resource Developer Guide*.

**Create mappings between context nodes and context attribute dictionaries**

Use the new `ContextNodeAttrDictionary` subtype on the existing `ContextDefinition` metadata type. Introduced in API version 60.0, this field has been added to the *Industries Common Resource Developer Guide*.

**Enable cloning, version control, and inheritance for context definitions**

Use the new `clonedFrom`, `inheritedFrom`, and `inheritedFromVersion` fields on the existing `ContextDefinition` metadata type. Introduced in API version 60.0, this field has been added to the *Industries Common Resource Developer Guide*.

## Connect REST APIs

Learn more about the updates to the Connect REST APIs in Context Service.

### IN THIS SECTION:

[New Connect REST API Resource](#)

Learn more about the new resource available with Context Service.

[Changed Connect REST API Response Bodies](#)

These response bodies have changes.

[Changed Connect REST API Request Bodies](#)

This request body has changes.

### New Connect REST API Resource

Learn more about the new resource available with Context Service.

**Configure a relationship node by adding child context nodes to a specific context node**

Make a POST request to the new `/connect/context-nodes/contextNodeId/configure/relationship` resource.

New request body: Context Node ID Input

SEE ALSO:

[Industries Common Resources Developer Guide: Context Service Business APIs](#)

**Changed Connect REST API Response Bodies**

These response bodies have changes.

Context Node Relationship (POST)

**Context Node**

This response body has these new properties.

- `canonicalNodeId`—ID of the canonical node that's used as a reference to create the context node.
- `displayName`—Name of the context node displayed on the UI.

Context Mapping (POST, PATCH)

**Context Mapping Output**

This response body has these new properties.

- `isInputMapped`—Indicates whether the specified context mapping details are mapped with the source (`true`) or not (`false`).
- `intents`—Context mapping that's associated with the usage intent.
- `mappedContextDefinitionName`—API name of the context definition when context-to-context mappings exist.

**Context Node Mapping Output**

This response body has this new property.

- `mappedContextNodeId`—Node ID in the source context definition.

**Context Attribute Mapping**

This response body has this new property.

- `contextAttrContextHydrationDetailList`—List of the context attribute hydration records when context-to-context mappings exist.

SEE ALSO:

[Industries Common Resources Developer Guide: Context Service Business APIs](#)

**Changed Connect REST API Request Bodies**

This request body has changes.

Context Mapping (POST, PATCH)

**Context Mappings Input**

This request body has this new property.

- `intents`—Purpose that's used to identify the type of required context mapping.

## Context Namespace

The `Context` namespace is used to manage the sharing and consumption of business application data by using Context Service. It has this new class and these methods.

### New Class

#### Manage the processes of a Context Service

These are highlights of the methods in the new `IndustriesContext` class. Use the `buildContext(input)` method to create a context. Use the `deleteContext(input)` method to delete a context. Use the `evictContextDefinition(input)` method to remove the details of the context definition from cache. Use the `getContext(input)` method to retrieve context details. Use the `getContextTranslation(input)` method to retrieve context mappings based on a target mapping ID. Use the `persistContext(input)` method to persist the current data or state of context. Use the `queryRecordStatus(input)` method to query the status of a record. Use the `queryTags(input)` method to query a context by using tags. Use the `updateContextAttributes(input)` method to update the attributes of a context.

## Criteria-Based Search and Filter

Enhance the search experience for customers and business partners by adding Criteria-Based Search and Filter to your Experience Cloud sites. Help users visualize data by showing resources from search results in an interactive map. Provide sorting options for search results displayed as cards. Share data from search results by using the prebuilt Copy Records and Create Report actions for Criteria-Based Search and Filter.

### IN THIS SECTION:

#### [Enrich the Search Experience on Experience Cloud Sites](#)

With Criteria-Based Search and Filter, authenticated and guest users can search across a rich set of data and initiate actions directly from search results. Add style to your search page by applying a theme with fonts and colors that match your site design or brand. Customize the search criteria, search result filters, and search result display to meet your business requirements.

#### [Show Search Results in an Interactive Map](#)

Help users find the most suitable resource based on location by showing a map alongside search results. Map markers show essential details about the people, places, or things in the search results.

#### [Help Users Refine Search Results with Sorting for Cards](#)

Provide an improved search experience to your users by adding options to sort search result cards. You can select up to 20 fields for sorting criteria, and users can sort by up to three fields when they view search results. Sorting was previously available only for search results in a list view.

#### [Copy and Report On Search Results](#)

With the new Copy Records and Create Report search actions, your users can now save and share search result details by copying data or creating a report directly from search results. The new actions use data from the selected search result records and the appropriate context record, such as the account record where the search is run.

#### [Connect REST APIs](#)

Learn more about the updates to the Connect REST APIs in Unified Object Search Data.



## Enrich the Search Experience on Experience Cloud Sites

With Criteria-Based Search and Filter, authenticated and guest users can search across a rich set of data and initiate actions directly from search results. Add style to your search page by applying a theme with fonts and colors that match your site design or brand. Customize the search criteria, search result filters, and search result display to meet your business requirements.

**Where:** This change applies to Lightning Experience editions where Criteria-Based Search and Filter is enabled.

**Who:** Users with the Criteria-Based Search and Filter system permission can configure and use criteria-based search and filter capabilities. To create an Experience Cloud site, users need the Create and Set Up Experiences and View Setup and Configuration permissions. To run searches and view search results, authenticated and guest users on Experience Cloud sites need the Criteria-Based Search and Filter for Experience Cloud permission set.

**How:** Configure a searchable object, search criteria, and search actions for authenticated and guest users on Experience Cloud sites. In Experience Builder, drag the Criteria-Based Search and Filter component to a search page on your site. Select the search configurations that you want to appear on the page and change or adjust the theme.

## Show Search Results in an Interactive Map

Help users find the most suitable resource based on location by showing a map alongside search results. Map markers show essential details about the people, places, or things in the search results.

**Where:** This change applies to Lightning Experience editions where Criteria-Based Search and Filter is enabled.

**Who:** Users with the Criteria-Based Search and Filter system permission can configure and use criteria-based search and filter capabilities.

**How:** Add a search configuration with distance criteria. From Setup, in the Quick Find box, enter *Criteria*, and then select **Criteria-Based Search and Filter**. On the Search Configuration tab, click **New**. When you configure the distance criteria, turn on Show Map. Then select the field values for the map marker titles and descriptions.

## Help Users Refine Search Results with Sorting for Cards

Provide an improved search experience to your users by adding options to sort search result cards. You can select up to 20 fields for sorting criteria, and users can sort by up to three fields when they view search results. Sorting was previously available only for search results in a list view.

**Where:** This change applies to Lightning Experience editions where Criteria-Based Search and Filter is enabled.

**Who:** Users with the Criteria-Based Search and Filter system permission can configure and use criteria-based search and filter capabilities. To select or configure an OmniStudio FlexCard for the card view, users need the OmniStudio Admin permission set.

**How:** Add a search configuration that sorts search results shown as cards. From Setup, in the Quick Find box, enter *Criteria*, and then select **Criteria-Based Search and Filter**. On the Search Configuration tab, click **New**. Select **Card** as the display format of search results, and then select an OmniStudio FlexCard. For sorting criteria, move up to 20 fields from the Available Fields list to the Selected Fields list.

## Copy and Report On Search Results

With the new Copy Records and Create Report search actions, your users can now save and share search result details by copying data or creating a report directly from search results. The new actions use data from the selected search result records and the appropriate context record, such as the account record where the search is run.

**Where:** This change applies to Lightning Experience editions where Criteria-Based Search and Filter is enabled.

**Who:** Users with the Criteria-Based Search and Filter system permission can configure and use criteria-based search and filter capabilities.

**How:** To use the Copy Records action, create a search action that specifies the Copy Records Lightning web component. To use the Create Report action, save the Create Report flow as a new flow. Specify a report template in the new flow, activate the flow, and then

create a search action that specifies the flow. To add the new actions to a search configuration, from Setup, in the Quick Find box, enter *Criteria*, and then select **Criteria-Based Search and Filter**. On the Search Configuration tab, click **New**. When you select actions for search results, move the new actions from the Available Fields list to the Selected Fields list.

The Copy Records action is available to internal users and Experience Cloud users. The Create Report action is available only to internal users.

## Connect REST APIs

Learn more about the updates to the Connect REST APIs in Unified Object Search Data.

### IN THIS SECTION:

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

This request body has changes.

#### [Changed Connect REST API Response Body](#)

This response body has changes.

## Changed Connect REST API Request Body

This request body has changes.

### Criteria Based Search Results

#### Unified Object Search Data Input

This request body has these new properties.

- `globalSearchTerm`—Keyword to perform a comprehensive search across all text-indexed columns of the specified object.
- `offset`—Number of records to skip before searching for records. The default value is 0.

### SEE ALSO:

[Automotive Cloud Developer Guide: Automotive Cloud Business APIs](#)

## Changed Connect REST API Response Body

This response body has changes.

### Criteria Based Search Results

#### Unified Object Search Data

This response body has these new properties.

- `mapData`—Map details of the records whose location will be displayed in search results.
- `offset`—Number of records skipped before returning all records.

### SEE ALSO:

[Automotive Cloud Developer Guide: Automotive Cloud Business APIs](#)

## Data Processing Engine

Upload large amounts of data into your definition with CSV files. Use the Data Cloud runtime with extended functionality for join, filter, formula, and writeback nodes.

### IN THIS SECTION:

#### [Use a CSV File as a Data Source](#)

Upload large amounts of CSV file data into your definition with the Data Cloud runtime. Add the CSV file in a data source node and configure the fields to use in the definition. After a definition is run, download any failed records in Monitor Workflow Services.

#### [Add Flexibility to Data Cloud Filter and Join Nodes with All Map Fields](#)

Filter and join nodes now support all Map Field data types in definitions that use the Data cloud runtime. This extended functionality brings the Data Cloud runtime in line with the CRMA runtime functionality in Data Processing Engine.

#### [Support for Multiple Writeback Nodes with Data Cloud](#)

You can now create up to five writeback object nodes per definition with the Data Cloud runtime. This extended functionality brings the Data Cloud runtime in line with the CRMA runtime functionality in Data Processing Engine.

#### [Make Smarter Definitions With Formula Nodes for Data Cloud](#)


Formula nodes are now available in definitions that use the Data Cloud runtime. Create multiple formulas and store the results of each formula in a new field. This extended functionality brings the Data Cloud runtime in line with the CRMA runtime functionality in Data Processing Engine.

#### [Metadata API](#)

Access more metadata through these new and changed metadata types.

### Use a CSV File as a Data Source

Upload large amounts of CSV file data into your definition with the Data Cloud runtime. Add the CSV file in a data source node and configure the fields to use in the definition. After a definition is run, download any failed records in Monitor Workflow Services.

 **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.

**Where:** This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Data Processing Engine is enabled.

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**Where:** This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Data Processing Engine is enabled.

## Metadata API

Access more metadata through these new and changed metadata types.

### Data Processing Engine

#### Configure CSV delimitation, file identification, directory referencing, and file sourcing for BatchCalcJobDatasource

Use the new `csvDelimiter`, `fileIdentifier`, `filePath`, `fileSource` fields on the existing `BatchCalcJobDatasource` metadata subtype of `BatchCalcJobDefinition` metadata type. Introduced in API version 61.0, this field has been added to the *Industries Common Resource Developer Guide*.

#### Define input field data types and primary key for CSV data sources

Use the new `dataType` and `isPrimaryKey` fields on the existing `BatchCalcJobDatasourceField` metadata subtype of `BatchCalcJobDefinition` metadata type. Introduced in API version 61.0, this field has been added to the *Industries Common Resource Developer Guide*.

#### Enable batch calculation job to use new object for the source object field

Use the new `DataLakeObject` value in the existing `type` field on the `BatchCalcJobDatasource` metadata subtype of the `BatchCalcJobDefinition` metadata type. Introduced in API version 60.0, this field has been added to the *Industries Common Resource Developer Guide*.

#### Specify an external field ID for the target object name

Use the new `externalIdFieldName` field on the existing `BatchCalcJobWritebackObject` metadata subtype of `BatchCalcJobDefinition` metadata type. Introduced in API version 61.0, this field has been added to the *Industries Common Resource Developer Guide*.

#### Add file identifier data type options in batch calculation job parameters

Use the new `FileIdentifier` value in the existing `dataType` field on the `BatchCalcJobParameter` metadata subtype of the `BatchCalcJobDefinition` metadata type. Introduced in API version 60.0, this field has been added to the *Industries Common Resource Developer Guide*.

#### Enable overwrite option for batch calculation job writeback objects

Use the new `Overwrite` value in the existing `operationType` field on the `BatchCalcJobWritebackObject` metadata subtype of the `BatchCalcJobDefinition` metadata type. Introduced in API version 60.0, this field has been added to the *Industries Common Resource Developer Guide*.

#### Expand process types with BenefitManagement for batch calculations

Use the new `BenefitManagement` value in the existing `processType` field on the `BatchCalcJobDefinition` metadata type. Introduced in API version 60.0, this field has been added to the *Industries Common Resource Developer Guide*.

#### Add a new platform to run the Data Processing Engine definition

Use the new `CORE` value in the existing `executionPlatformType` field on the `BatchCalcJobDefinition` metadata type. Introduced in API version 60.0, this field has been added to the *Industries Common Resource Developer Guide*.

## Einstein Summary

Use Einstein Summary to quickly generate a summary of the information stored in object records. For example, a contact center agent can generate the summary of a customer interaction.

### IN THIS SECTION:

#### [Efficiently Summarize the Information Stored in Object Records](#)

Eliminate the manual effort of contact center agents (CCAs) to summarize the information stored in object records by using Einstein Summary. For example, a CCA can use a prompt template to efficiently summarize a customer interaction and free up time to assist more customers. Einstein Summary generates a summary of the customer interaction information that is stored in the records of the Engagement Interaction object and its related objects: Engagement Topic and Content Document Link.

### SEE ALSO:

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

## Efficiently Summarize the Information Stored in Object Records

Eliminate the manual effort of contact center agents (CCAs) to summarize the information stored in object records by using Einstein Summary. For example, a CCA can use a prompt template to efficiently summarize a customer interaction and free up time to assist more customers. Einstein Summary generates a summary of the customer interaction information that is stored in the records of the Engagement Interaction object and its related objects: Engagement Topic and Content Document Link.

**Where:** This change applies to Lightning Experience in clouds where Einstein Summary is available.

**Who:** To use this feature, users need the Industry Service Excellence, Einstein GPT Platform, and Einstein for Service Innovations add-on licenses.

**How:** Add the Einstein Summary component to a Lightning record page through Lightning App Builder. To generate a summary, CCAs can select a prompt template in Einstein Summary.

## Engagement (Beta)

Einstein Copilot can now generate a summary of one or more customer interactions.

### IN THIS SECTION:

#### [Efficiently Summarize a Customer Interaction \(Beta\)](#)

Use Einstein Copilot to eliminate the manual effort required to summarize a customer interaction and free the time of contact center agents to assist more customers. To generate the summary, Einstein Copilot taps into the customer interaction information, including transcripts, which are stored in an Engagement Interaction, a Messaging Session, or a Voice Call record and in the Engagement Topic and Content Document Link related object records.

### [Efficiently Summarize Up To Five Recent Customer Interactions \(Beta\)](#)

Users can now harness the power of Einstein Copilot to generate a summary of up to five recent customer interactions. With Einstein Copilot, users spend less time on summarizing customer interactions and more time on completing valuable tasks. To generate the summary, Einstein Copilot taps into the customer interaction information, including transcripts, which are stored in the Engagement Interaction, Messaging Session, or Voice Call records and in the Engagement Topic and Content Document Link related object records.

#### SEE ALSO:

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

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

### Efficiently Summarize a Customer Interaction (Beta)

Use Einstein Copilot to eliminate the manual effort required to summarize a customer interaction and free the time of contact center agents to assist more customers. To generate the summary, Einstein Copilot taps into the customer interaction information, including transcripts, which are stored in an Engagement Interaction, a Messaging Session, or a Voice Call record and in the Engagement Topic and Content Document Link related object records.

**Where:** This change applies to Lightning Experience in clouds where Einstein Copilot is available.



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

**Who:** To use this feature, users need the Industry Service Excellence, Digital Engagement, and Service Cloud Voice add-on licenses.

**How:** To summarize a customer interaction, submit an utterance in Einstein Copilot from an Engagement Interaction, a Messaging Session, or a Voice Call record page.

### Efficiently Summarize Up To Five Recent Customer Interactions (Beta)

Users can now harness the power of Einstein Copilot to generate a summary of up to five recent customer interactions. With Einstein Copilot, users spend less time on summarizing customer interactions and more time on completing valuable tasks. To generate the summary, Einstein Copilot taps into the customer interaction information, including transcripts, which are stored in the Engagement Interaction, Messaging Session, or Voice Call records and in the Engagement Topic and Content Document Link related object records.

**Where:** This change applies to Lightning Experience in clouds where Einstein Copilot is available.



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

**Who:** To use this feature, users need the Industry Service Excellence add-on license and optionally, the Service Cloud Voice and Digital Engagement add-on licenses.

**How:** To summarize up to five recent customer interactions, submit an utterance in Einstein Copilot from an Account record page.

## Grantmaking

Create robust grant applications to help grant seekers save their progress and quickly see incomplete sections. Applicants can also add collaborators to complete different sections of the application. Track and measure the impact of your grants with Outcome Management. Ask grant recipients to report the outcomes of your grant funding in Experience Cloud.

**IN THIS SECTION:**[Effortlessly Launch Complex Grant Applications](#)

Configure and launch a complex grant application with multiple sections. Grant applicants can work on an application over days or weeks in a guided manner and quickly see what sections are still incomplete. The Grantmaking Manager and Grantmaking for Experience Cloud permission sets now include access to the objects and fields related to Individual Applications.

[Measure the Impact and Success of Grants with Outcome Management](#)

You can now indicate the funding opportunities and funding awards that you expect to drive outcomes. In addition, create increased visibility into your overall strategy for creating impact and alignment across your organization. Through Experience Cloud, grant recipients can outline and report on the impact of the grant they received. The Grantmaking Manager and Grantmaking for Experience Cloud permission sets now include access to the new Grantmaking fields on Outcome Management objects.

[Securely Collaborate on Grantmaking Application Sections](#)

Grant applicants can securely add collaborators to help complete sections of a grant application in your Experience Cloud site. For example, the development director that completes the organizational summary information in an application can add the program director to complete the details about their programs and the planned budget for the grant. The Grantmaking Manager and Grantmaking for Experience Cloud permission sets now include access to the new Individual Application Task Participant object.

[Easily Add Grantmaking Permission Sets to Permission Set Groups](#)

To give more permissions to or remove permissions from users, create custom permission sets. Then, include your custom permission sets in a permission set group with the Grantmaking permission. This approach ensures users always have the latest default permissions and is an alternative to cloning permission sets. Previously, users cloned the Grantmaking permission set to customize permissions. Now, they can add the Grantmaking permission sets to permission set groups to use alongside their custom permission sets.

[Quickly Delete Individual Applications](#)

Use the Delete button on individual applications that are a Grantmaking type. Previously, in orgs with Grantmaking enabled users set individual applications to an inactive status. Now, they can delete the records they don't need.

[New and Changed Objects for Grantmaking](#)

To build complex grant applications and define and measure the impact of your grants, use the new and updated Grantmaking and Outcome Management objects and fields.

## Effortlessly Launch Complex Grant Applications

Configure and launch a complex grant application with multiple sections. Grant applicants can work on an application over days or weeks in a guided manner and quickly see what sections are still incomplete. The Grantmaking Manager and Grantmaking for Experience Cloud permission sets now include access to the objects and fields related to Individual Applications.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Grantmaking is enabled.

**SEE ALSO:**

[Help Documentation: Create a Grantmaking Form \(can be outdated or unavailable during release preview\)](#)

## Measure the Impact and Success of Grants with Outcome Management

You can now indicate the funding opportunities and funding awards that you expect to drive outcomes. In addition, create increased visibility into your overall strategy for creating impact and alignment across your organization. Through Experience Cloud, grant recipients can outline and report on the impact of the grant they received. The Grantmaking Manager and Grantmaking for Experience Cloud permission sets now include access to the new Grantmaking fields on Outcome Management objects.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Grantmaking and Outcome Management are enabled.

SEE ALSO:

[Help Documentation: Define and Measure the Impact of Grants with Outcome Management \(can be outdated or unavailable during release preview\)](#)

## Securely Collaborate on Grantmaking Application Sections

Grant applicants can securely add collaborators to help complete sections of a grant application in your Experience Cloud site. For example, the development director that completes the organizational summary information in an application can add the program director to complete the details about their programs and the planned budget for the grant. The Grantmaking Manager and Grantmaking for Experience Cloud permission sets now include access to the new Individual Application Task Participant object.

**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 by 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 access a shared record, users need the Use Compliant Data Sharing system permission.

SEE ALSO:

[Help Documentation: Securely Share Grantmaking Records in CRM or Experience Cloud Using Compliant Data Sharing \(can be outdated or unavailable during release preview\)](#)

## Easily Add Grantmaking Permission Sets to Permission Set Groups

To give more permissions to or remove permissions from users, create custom permission sets. Then, include your custom permission sets in a permission set group with the Grantmaking permission. This approach ensures users always have the latest default permissions and is an alternative to cloning permission sets. Previously, users cloned the Grantmaking permission set to customize permissions. Now, they can add the Grantmaking permission sets to permission set groups to use alongside their custom permission sets.

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Use the Delete button on individual applications that are a Grantmaking type. Previously, in orgs with Grantmaking enabled users set individual applications to an inactive status. Now, they can delete the records they don't need.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Grantmaking is enabled.

## New and Changed Objects for Grantmaking

To build complex grant applications and define and measure the impact of your grants, use the new and updated Grantmaking and Outcome Management objects and fields.

### Enhance Applications with new Grantmaking fields

Use the existing ApplicationRenderMethod, ApplicationStageDefinition, and IndividualApplicationTask objects that are added to the Grantmaking license.



### Use Compliant Data Sharing with Individual Application

Turn on Compliant Data Sharing for the new `IndvApplicationTaskParticipant` object.

### Connect Grantmaking to Outcome Management

Use the new `FundingAward`, `FundingOpportunity`, and `IndividualApplication` fields on the existing Outcome Activity object. Use the new `FundingAward`, `FundingOpportunity`, and `IndividualApplication` fields on the existing Indicator Assignment object. Use the new `FundingAwardRequirement` field on the existing Indicator Performance Period object.

SEE ALSO:

[Developer Documentation: Grantmaking Developer Guide](#)

## Industry Integration Solutions

Deploy the prebuilt industry integrations to CloudHub 2.0 shared spaces supported by MuleSoft Automation Services. Additionally, you can choose to hide the values of configuration parameters during the deployment process.

IN THIS SECTION:

[Efficiently Deploy Industry Integrations to CloudHub 2.0](#)

Deploy the pre-built industry integrations, which are available on the MuleSoft Direct page, to a specific shared space within CloudHub 2.0. Depending on your subscription, if you have a global deployment entitlement, all regions are accessible. Otherwise, only the regions available to your organization are shown.

[Ensure Confidentiality of Parameter Values on Anypoint Platform](#)

Hide the values of the configuration parameters on Mulesoft's Anypoint Runtime Manager when you deploy integration apps on CloudHub 2.0.

### Efficiently Deploy Industry Integrations to CloudHub 2.0

Deploy the pre-built industry integrations, which are available on the MuleSoft Direct page, to a specific shared space within CloudHub 2.0. Depending on your subscription, if you have a global deployment entitlement, all regions are accessible. Otherwise, only the regions available to your organization are shown.

**Where:** This change applies to Lightning Experience where Industry Integration Solutions is enabled.

SEE ALSO:

[https://help.salesforce.com/s/articleView?id=sf.enable\\_integration\\_assets.htm](https://help.salesforce.com/s/articleView?id=sf.enable_integration_assets.htm)

### Ensure Confidentiality of Parameter Values on Anypoint Platform

Hide the values of the configuration parameters on Mulesoft's Anypoint Runtime Manager when you deploy integration apps on CloudHub 2.0.

**Where:** This change applies to Lightning Experience where Industry Integration Solutions is enabled.

SEE ALSO:

[https://help.salesforce.com/s/articleView?id=sf.enable\\_integration\\_assets.htm](https://help.salesforce.com/s/articleView?id=sf.enable_integration_assets.htm)

## Intelligent Document Reader

Get Intelligent Document Reader to easily extract unstructured content and tables from documents, excluding rows you need not save.

### IN THIS SECTION:

#### [Optimize Data Extraction by Excluding Rows in Tabular Data](#)

Exclude rows during tabular data extraction that you do not need to save by using the new Skip record option in the Intelligent Document Reader. Gain better control over the extraction process to capture only the relevant information.

## Optimize Data Extraction by Excluding Rows in Tabular Data

Exclude rows during tabular data extraction that you do not need to save by using the new Skip record option in the Intelligent Document Reader. Gain better control over the extraction process to capture only the relevant information.

**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.

## Intelligent Form Reader

Get Intelligent Form Reader to easily extract unstructured content and tables from documents, excluding rows you need not save.

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**Who:** Apart from Financial Services Cloud, Health Cloud, and Public Sector Solutions, Intelligent Form Reader is also available with the Intelligent Form Reader add-on license for the Automotive, Consumer Goods, Education, Manufacturing, Media, and Net Zero clouds.

## Interaction Summaries

Easily capture detailed notes of meetings and interactions by using a single, unified flow.

### IN THIS SECTION:

#### [Efficiently Create and Manage Interaction Notes](#)

Reduce administrative overhead by taking Interaction Summary notes with a single component. Easily capture meeting notes; record attendees; include dates, times, and other details; add tags; and upload documents in a simple flow. Share interaction notes with other users and publish approved notes to prevent further edits with just a few clicks.

### [New and Changed Objects in Interaction Summaries](#)

Do more with a new field on the Interaction Summary object.

## Efficiently Create and Manage Interaction Notes

Reduce administrative overhead by taking Interaction Summary notes with a single component. Easily capture meeting notes; record attendees; include dates, times, and other details; add tags; and upload documents in a simple flow. Share interaction notes with other users and publish approved notes to prevent further edits with just a few clicks.

**Where:** This change applies to Lightning Experience where Interaction Summaries and Program and Benefit Management are enabled.

**Who:** Users with the Interaction Summaries and Program and Benefit Management permission set licenses.

SEE ALSO:

[Salesforce Help: Configure and Capture Interactions in Public Sector Solutions \(can be outdated or unavailable during release preview\)](#)

## New and Changed Objects in Interaction Summaries

Do more with a new field on the Interaction Summary object.

### Specify the status of a meeting note

Use the new `MeetingNotesStatus` field on the existing Interaction Summary object.



**Note:** To use this field, Program and Benefit Management must be enabled. This field isn't available in Financial Services Cloud.

## List Builder for Data Cloud Segment

The records removed from a Data Cloud segment get suppressed in the associated actionable list.

IN THIS SECTION:

### [Get Better Outreach Results by Suppressing Irrelevant Records](#)

The removal of records from a Data Cloud segment now suppresses the records in the associated actionable list. The status of the suppressed records changes to inactive in the actionable list. When the records are reincorporated to the segment, the records revert to the active status. With an up-to-date actionable list, contact center agents can contact the appropriate prospects and improve the customer conversion rates.

### [Changed Object in List Builder for Data Cloud Segment](#)

Use the changed object to suppress prospect records in an actionable list.

SEE ALSO:

[Salesforce Help: List Builder for Data Cloud Segment \(can be outdated or unavailable during release preview\)](#)

## Get Better Outreach Results by Suppressing Irrelevant Records

The removal of records from a Data Cloud segment now suppresses the records in the associated actionable list. The status of the suppressed records changes to inactive in the actionable list. When the records are reincorporated to the segment, the records revert to the active status. With an up-to-date actionable list, contact center agents can contact the appropriate prospects and improve the customer conversion rates.

**Where:** This change applies to Lightning Experience in clouds where List Builder for Data Cloud Segment is available.

**Who:** To use this feature, list creators need the Industry Sales Excellence, Segmentation and Activation, and Data Spaces add-on licenses.

## Changed Object in List Builder for Data Cloud Segment

Use the changed object to suppress prospect records in an actionable list.

### Specify the status of the actionable list member record in the associated Data Cloud segment or other sources

Use the new `SourceRecordStatus` field on the `ActionableListMember` object.

### Indicate the status of the actionable list member

Use the new `RecordStatus` field on the `ActionableListMember` object.

### Store the ID of the actionable list member record created by combining the record's actionable list ID and reference record values

Use the new `AdditionalIdentifier` field on the `ActionableListMember` object.

## Rollup Definitions for Record Rollups

Use the Record Rollup Definitions feature to streamline the aggregation of records from various objects or groups and to provide a consolidated view of your data.

### IN THIS SECTION:

#### [Work More Intuitively with Record Rollup Definitions UI](#)

Create record rollup definitions with just a few clicks by using an easy-to-use and intuitive UI. Use the record rollup definitions to aggregate records from multiple objects or groups according to your business requirements. The record rollup definitions can be run by using a simple schedule-triggered flow that runs the Data Processing Engine definition associated with the record rollup definition. Use the `ShowRecordRollupResults` component to show record rollup results in a clear and organized format on the record details page.

#### [New Connect REST API Resource in Record Rollup Definitions](#)

Learn more about the new resource available with Record Rollup Definitions.

## Work More Intuitively with Record Rollup Definitions UI

Create record rollup definitions with just a few clicks by using an easy-to-use and intuitive UI. Use the record rollup definitions to aggregate records from multiple objects or groups according to your business requirements. The record rollup definitions can be run by using a simple schedule-triggered flow that runs the Data Processing Engine definition associated with the record rollup definition. Use the `ShowRecordRollupResults` component to show record rollup results in a clear and organized format on the record details page.

**Where:** This change applies to Lightning Experience of multiple Industries clouds.

**Why:** Business executives often struggle to make informed decisions because the data is scattered across different objects. Deriving intelligent insights from scattered data isn't only costly and time-consuming, but also prevents the business executives from seeing the bigger picture. Your business executives can use the consolidated data to make informed decisions more quickly and accurately.

**How:** From Setup, in the Quick Find box, enter *Rollup Definitions*, and then select **Record Rollup Definitions**. To create a record rollup definition, click **New Rollup Definition**.

### SEE ALSO:

[Salesforce Help: Rollup Definitions for Record Rollups](#)

## New Connect REST API Resource in Record Rollup Definitions

Learn more about the new resource available with Record Rollup Definitions.

### Get record rollup results for a specific record aggregation definition

Make a POST request to the new

`/connect/record-aggregation/recordAggregationDefinitionId/record-rollup-results` resource.

New request body: Record Rollup Input

New response body: Record Rollup

SEE ALSO:

[Industries Common Resources Developer Guide: Record Rollup Definitions Business APIs](#)

## Scoring Framework

Use Scoring Framework, a CRM Analytics-based framework, to easily and quickly build and deploy propensity models for multiple Industries clouds use cases using clicks instead of code. Define template configurations for your scoring use cases to create CRM Analytics apps, Einstein Discovery models, and recipes.

IN THIS SECTION:

[Efficiently Debug Analytics App Installation Failures with Saved Assets](#)

Maintain access to assets even if the analytics app installation fails to streamline issue identification and resolution. Save assets during installation to enhance debugging efficiency.

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Maintain access to assets even if the analytics app installation fails to streamline issue identification and resolution. Save assets during installation to enhance debugging efficiency.

**Where:** This change applies to Lightning Experience where Scoring Framework is enabled.

**Who:** This feature is available to users with the AI Accelerator with Scoring Framework permission set license.

**How:** To enable asset saving, go to the Setup page of Scoring Framework and open a CRM Analytics template configuration. Click **Set Up** for the Configure Write Back of Predictions step and select **Setup Debug Configuration**.

## Service Process Studio

You can now integrate Service Process Studio with Product Catalog Management to enable controlled access for service processes.

IN THIS SECTION:

[Control Access to Service Processes by Listing Them as Products](#)

Service Process Studio now integrates with Product Catalog Management. When you create service processes in Service Process Studio, they're automatically added as service process products in Product Catalog Management. With this integration, you can associate active service process products with a product catalog and define user access control and customer eligibility rules. By adding the catalog and expression set names in Action Launcher properties, you can show your users relevant service processes.

[Watch the Service Process Studio Video](#)

New video helps your users learn about the capabilities of Service Process Studio.

## Control Access to Service Processes by Listing Them as Products

Service Process Studio now integrates with Product Catalog Management. When you create service processes in Service Process Studio, they're automatically added as service process products in Product Catalog Management. With this integration, you can associate active service process products with a product catalog and define user access control and customer eligibility rules. By adding the catalog and expression set names in Action Launcher properties, you can show your users relevant service processes.


**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions where Service Process Studio and Product Catalog Management are available.

SEE ALSO:

[https://help.salesforce.com/s/articleView?id=sf.spd\\_eligibility\\_rules\\_and\\_access\\_control\\_for\\_service\\_processes.htm](https://help.salesforce.com/s/articleView?id=sf.spd_eligibility_rules_and_access_control_for_service_processes.htm)

## Watch the Service Process Studio Video

New video helps your users learn about the capabilities of Service Process Studio.

-  [Streamline Customer Service Operations with Service Process Studio](#) explores how to use Service Process Studio to quickly and efficiently design seamless case-driven customer service processes.

## Stage Management

With Stage Management, simplify complex business processes with greater visibility and control.

IN THIS SECTION:

[Automate and Manage Business Process Stage Transitions](#)

Use Stage Management to achieve sophisticated automation within Salesforce. Define the business process stages, transitions, and criteria that are required to complete each stage of a complex business process. For example, you can specify the criteria and conditions to facilitate the transition between the stages during customer onboarding and run post-transition steps.

## Automate and Manage Business Process Stage Transitions

Use Stage Management to achieve sophisticated automation within Salesforce. Define the business process stages, transitions, and criteria that are required to complete each stage of a complex business process. For example, you can specify the criteria and conditions to facilitate the transition between the stages during customer onboarding and run post-transition steps.

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

**When:** Stage Management is available starting on 14th August, 2024.

**Why:** Complex workflows often require custom code to manage the transition between stages, which is time-consuming and costly. Stage Management provides:

- Increased efficiency: Save time and resources by reducing the reliance on custom code development.
- Improved visibility: Gain clear insight into record stage progress, enabling you to optimize your business processes more efficiently.
- More granular stage control: Restrict stage transitions based on user access and entry criteria.
- Improved automation: Configure and automate post-transition actions, such as the integration with external systems or the completion of document checklist items.

**How:** In Setup, search for and select **Stage Management**. Turn on Stage Management.

SEE ALSO:

[Salesforce Help: Stage Management](#)

## Timeline

Configure a data graph in Timeline to show engagement events from data model objects (DMOs), including the Unified Individual DMO. Include event summaries on Timeline.

IN THIS SECTION:

### [Quickly Deliver Better Customer Insights to Contact Center Agents \(CCAs\) With Data Graph](#)

Configure Timeline with data graphs to load engagement events faster from data model objects (DMOs), including the Unified Individual DMO. The consolidated list of events helps CCAs enhance information retrieval, understand the historical context, and have contextual and concise communication with customers and prospects.

### [Provide Personalized Support to Customers with Summaries on Timeline](#)

Configure Timeline to show summaries of events to your contact center agents (CCAs). The summaries provide the CCAs with a quick overview of events and enhance their understanding of past events.

SEE ALSO:

[Salesforce Help: View Events Using Timeline in Salesforce \(can be outdated or unavailable during release preview\)](#)

## Quickly Deliver Better Customer Insights to Contact Center Agents (CCAs) With Data Graph

Configure Timeline with data graphs to load engagement events faster from data model objects (DMOs), including the Unified Individual DMO. The consolidated list of events helps CCAs enhance information retrieval, understand the historical context, and have contextual and concise communication with customers and prospects.

**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 Graph add-on licenses. CCAs must have access to the selected data space and data graph. You must turn on the Data Cloud Events admin setting.

**How:** From Setup, on the Timeline page, create a Timeline and click **Timeline Related Objects**. On the Data Graph tab, enter the details, and then activate the Timeline.

## Provide Personalized Support to Customers with Summaries on Timeline

Configure Timeline to show summaries of events to your contact center agents (CCAs). The summaries provide the CCAs with a quick overview of events and enhance their understanding of past events.

**Where:** This change applies to Lightning Experience in clouds where Timeline is available.

**Who:** To use this feature, users need the Industry Service Excellence add-on license. You must turn on the Timeline Summary admin setting.

**How:** From Setup, on the Timeline page, create a Timeline and click **Timeline Related Objects**. On the Salesforce Platform Events tab, enter the details, select the field containing the summary, and then activate the Timeline.

# Marketing

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Salesforce offers three marketing products: Account Engagement (formerly known as Pardot), Engagement (formerly known as Marketing Cloud), and Marketing Cloud Growth edition. Unified Messaging tools support Marketing Cloud Growth and other Salesforce apps.

## IN THIS SECTION:

### [Einstein Personalization](#)

Einstein Personalization is a Customer 360 application that works with Data Cloud to provide personalized experiences across Salesforce clouds. Combining optimized key business objectives with rules-based targeting and decision making, Einstein Personalization delivers real-time, personalized decisions across channels.

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

Save time and reduce workload by sending operational emails through Engagement Studio, copying your assets directly to Salesforce CMS, and viewing account alerts in Optimizer. If you use the Engage for Gmail Chrome extension, make a transition plan before June 2024.

### [Marketing Cloud Engagement](#)

The Summer '24 Marketing Cloud Engagement release occurs June 7, 2024 through June 28, 2024. Some features are made available to your instance within a week of the release.

### [Marketing Cloud Growth](#)

Marketing Cloud Growth offers a number of enhancements in Summer '24, including the introduction of campaign members to build lists, external tracking options, additional Flow Builder elements, and productivity enhancements to content workspaces.

### [Unified Messaging](#)

Unified Messaging consolidates customer communication channels, like email, SMS, and WhatsApp, into one unified platform. You can now bring your existing WhatsApp number into Unified Messaging. Improve the customer support experience in Journey Builder with new tools.

## Einstein Personalization

Einstein Personalization is a Customer 360 application that works with Data Cloud to provide personalized experiences across Salesforce clouds. Combining optimized key business objectives with rules-based targeting and decision making, Einstein Personalization delivers real-time, personalized decisions across channels.

## IN THIS SECTION:

### [Provide Personalized Experiences With Einstein Personalization](#)

Use Einstein Personalization to deliver timely, relevant, personalized experiences. As a new Customer 360 application built on Data Cloud, Einstein Personalization provides AI-based recommendations and personalized content to customers or site visitors in real time.

## Provide Personalized Experiences With Einstein Personalization

Use Einstein Personalization to deliver timely, relevant, personalized experiences. As a new Customer 360 application built on Data Cloud, Einstein Personalization provides AI-based recommendations and personalized content to customers or site visitors in real time.

**Where:** This feature is available in Lightning Experience in Enterprise, Unlimited, Performance, and Developer editions.

**When:** This feature is available on a restricted basis in Summer '24. Contact your Account Executive for more information.



**How:** Einstein Personalization requires the installation and configuration of Data Cloud. Using foundational Data Cloud elements, like real-time data ingestion, identity resolution, calculated insights, and data graphs, Einstein Personalization can deliver relevant, targeted, individualized content to customers at the right time. Einstein Personalization also gathers and displays metrics to provide insights into the usage and effectiveness of personalized decisions.

SEE ALSO:

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

## Marketing Cloud Account Engagement

Save time and reduce workload by sending operational emails through Engagement Studio, copying your assets directly to Salesforce CMS, and viewing account alerts in Optimizer. If you use the Engage for Gmail Chrome extension, make a transition plan before June 2024.

IN THIS SECTION:

[Send Operational Emails to Opted-Out Prospects Directly from Engagement Studio](#)

You can now send non-marketing emails to opted-out prospects directly from Engagement Studio. Previously, you could only send operational emails as list emails.

[Copy Images to a Salesforce CMS Workspace](#)

Transfer your images to a Salesforce CMS workspace where they can be accessed for future marketing initiatives, such as to create an email campaign.

[View Alerts in the Optimizer](#)

Access alerts and feature recommendation banners in a dedicated messaging section within the Account Engagement Optimizer.

[Account Engagement API: New and Changed Items](#)

Access more of your data with new updates for version 5 of Account Engagement API.

[Engage for Gmail Chrome Extension Is Being Retired](#)

Because Google is disabling its Manifest V2 Chrome extensions, the Engage for Gmail extension, which is built on Manifest V2, is projected to retire in June 2024. We recommend working with your Account Engagement users to create a transition plan. You can continue to send emails directly through Salesforce using the Account Engagement Sales Email & Alerts feature.

## Send Operational Emails to Opted-Out Prospects Directly from Engagement Studio

You can now send non-marketing emails to opted-out prospects directly from Engagement Studio. Previously, you could only send operational emails as list emails.

**Where:** This change applies to all Account Engagement editions.

SEE ALSO:

[Salesforce Help: Sending Non-Marketing Emails \(can be outdated or unavailable during release preview\)](#)

## Copy Images to a Salesforce CMS Workspace

Transfer your images to a Salesforce CMS workspace where they can be accessed for future marketing initiatives, such as to create an email campaign.

**Where:** This change applies to Marketing Cloud Account Engagement Growth edition, with Data Cloud enabled.

SEE ALSO:

[Salesforce Help: Enable Copy to CMS for Account Engagement Business Units \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Copy Image Files from Your Account Engagement Business Unit to a CMS Workspace \(can be outdated or unavailable during release preview\)](#)

## View Alerts in the Optimizer

Access alerts and feature recommendation banners in a dedicated messaging section within the Account Engagement Optimizer.

**Where:** This change applies to all Account Engagement editions.

SEE ALSO:

[Salesforce Help: About Account Engagement Optimizer \(can be outdated or unavailable during release preview\)](#)

## Account Engagement API: New and Changed Items

Access more of your data with new updates for version 5 of Account Engagement API.

### API Changes

#### Export Relationships

Exporting and pulling related data based on defined relationships is now supported.

#### Landing Pages

You can now create landing pages using the API.

#### API V5 for Flow

Bulk Asset Copy flows now support forms.

SEE ALSO:

[Developer Documentation: Version 5 of the Marketing Cloud Account Engagement API \(can be outdated or unavailable during release preview\)](#)

## Engage for Gmail Chrome Extension Is Being Retired

Because Google is disabling its Manifest V2 Chrome extensions, the Engage for Gmail extension, which is built on Manifest V2, is projected to retire in June 2024. We recommend working with your Account Engagement users to create a transition plan. You can continue to send emails directly through Salesforce using the Account Engagement Sales Email & Alerts feature.

**Where:** This change applies to all Account Engagement editions.

SEE ALSO:

[Knowledge Article: Marketing Cloud Account Engagement Engage for Gmail Chrome Extension Retirement](#)

# Marketing Cloud Engagement

The Summer '24 Marketing Cloud Engagement release occurs June 7, 2024 through June 28, 2024. Some features are made available to your instance within a week of the release.

Get an exclusive, in-depth look at our new features by tuning into the Summer '24 Marketing Cloud Engagement Release New Feature Overview. Join this [webinar](#) on June 27, 2024 at 2 PM EDT.

## IN THIS SECTION:

### [App, Setup, and Security](#)

Welcome customers and obtain important subscriber information with Package Manager retail onboarding and interactive email Industry Solutions. In Automation Studio, visualize automation history with a new dashboard, and do more with the updated Import File activity. Optimize your scheduled automations with recommended start times. Also, Social Studio is being retired.

### [Cross-Cloud](#)

Prevent sending Distributed Marketing emails that have empty text blocks.

### [Data Management](#)

Data extension field limits in Contact Builder are now 255 characters. Send and engagement data is now retained for 180 days.

### [Developers](#)

Compress journey history downloads for smaller file sizes and faster retrieval. Manage data extensions using REST API. Release multiple contacts from Wait Until API Event steps in journeys. Use AMPscript to encode JWTs with RSA signatures.

### [Journeys](#)

Specify Inbox message send times in Journey Builder. Improve journey performance with new recommendations, and add a high priority to journeys.

### [Messaging](#)

In MobileConnect, you can now use DLT templates and shortened SMS links with custom domains. For MobilePush, this release introduces more ENS events, improved guidance for SDK implementation, a self-diagnostic tool for troubleshooting app configurations, and the option to bring MobilePush into your Flutter apps. Additional updates to MobilePush ensure that your iOS SDKs and push notification sends to Android devices stay compliant with new privacy regulations and messaging requirements.

### [Marketing Cloud Intelligence](#)

Analyze additional campaign data with Performance Max in Bing Ads, integrate Marketing Cloud Intelligence with Google Search Ads 360, get more data with additional fields in Google Display & Video 360, and understand customer behavior with LinkedIn.

### [Marketing Cloud Personalization](#)

Proactively manage more org-wide total and dataset-specific Marketing Cloud Personalization consumption metrics.

### [Archived Release Notes](#)

Marketing Cloud Engagement release notes from Spring '24 and earlier are available for PDF download. Refer to help documentation for the most accurate and current information about Engagement.

## SEE ALSO:

[Which Marketing Product Do I Have?](#)

## App, Setup, and Security

Welcome customers and obtain important subscriber information with Package Manager retail onboarding and interactive email Industry Solutions. In Automation Studio, visualize automation history with a new dashboard, and do more with the updated Import File activity. Optimize your scheduled automations with recommended start times. Also, Social Studio is being retired.

## IN THIS SECTION:

[Quickly Deploy a Retail Onboarding Journey with Industry Solutions](#)

Increase efficiency and engage customers by using Package Manager Industry Solutions retail onboarding campaign templates with industry-specific journeys, content, automations, and landing pages.

[Get More Subscriber Information with Package Manager Interactive Email Industry Solutions](#)

Use Package Manager Industry Solutions campaign templates to work faster with industry-specific journeys, content, automations, and landing pages. Get important subscriber information and quickly deploy interactive email forms with all the required assets with these five new interactive email solutions—case form, empty form, lead form, progressive profile form, and review form. Subscribers can submit forms without leaving their inbox and you can obtain important subscriber information.

[Visualize Automation History](#)

View your automations over time and improve overall automation health using the new automation history dashboard. Get information about automation status, low success rates, and high skip or error counts. Access the report on the new History tab in Automation Studio. This feature is available only in English.

[Copy Large Datasets Efficiently in Automation Studio](#)

Use the improved Data Copy or Import activity—previously called the Import File activity—to copy large datasets by using a data extension as the source. The updated copy activity eliminates the need to create SQL queries for copying data. Existing Import File activities are now labeled Data Copy or Import, but their behavior is unaffected.

[Fine-Tune Permissions for SFTP Users](#)

Improve security by granting your SFTP users different levels of access. At the user level, assign access to view, edit, download from, and upload to top-level SFTP folders. You can also apply an additional layer of access by customizing each user's home directory.

[Plan Automations Based on Start-Time Scheduling Recommendations](#)

Automation Studio experiences significant traffic during the beginning of the hour (:00) and middle (:30). Use start-time scheduling recommendations to help you plan automation start times and distribute tasks to more efficient periods. Existing automation schedules are unaffected, and you can continue to specify the exact start time.

[Repeat Automations More Frequently](#)

Schedule automations that repeat as often as every 15 minutes. Previously, the minimum interval for a scheduled automation was 1 hour.

[Get More Insights About Your Automation Health and History](#)

The health and history report provides more details about your automations. You can now see the source, creation date, frequency, and the most recent run date and time.

[Secure Event Notification Service Connections with OAuth 2.0 with Assertion Authentication](#)

Use OAuth 2.0 with assertion to authenticate using a JSON Web Token (JWT) to securely connect to Event Notification Service before pushing event notifications to webhooks. Assertion authentication enhances the existing authentication options. Use the ENS Authentication API to implement OAuth 2.0 with assertion.

[Monitor Event Notification Service Callbacks Using Alert Manager](#)

Alert Manager now notifies you whenever a server-side issue with an ENS callback occurs, giving you instant and transparent insight into ENS health. The Alert Manager integration enables you to fall back to alternative reporting methods during ENS outages.

[Social Studio Is Being Retired](#)

Social Studio is being retired on November 18, 2024. When your existing contract ends or on November 18, 2024, whichever comes first, you can no longer access Social Studio. Your customer data will be deleted 90 days later in compliance with the Salesforce Marketing Cloud Security, Privacy, and Architecture (SPARC) documentation. To switch to another approved Salesforce product, contact your account executive.

## Quickly Deploy a Retail Onboarding Journey with Industry Solutions

Increase efficiency and engage customers by using Package Manager Industry Solutions retail onboarding campaign templates with industry-specific journeys, content, automations, and landing pages.

**Where:** This change applies to all Marketing Cloud Engagement editions.

**When:** This feature is available on or after July 1, 2024.

## Get More Subscriber Information with Package Manager Interactive Email Industry Solutions

Use Package Manager Industry Solutions campaign templates to work faster with industry-specific journeys, content, automations, and landing pages. Get important subscriber information and quickly deploy interactive email forms with all the required assets with these five new interactive email solutions—case form, empty form, lead form, progressive profile form, and review form. Subscribers can submit forms without leaving their inbox and you can obtain important subscriber information.

**Where:** This change applies to all Marketing Cloud Engagement editions.

**When:** This feature is available on or after July 1, 2024.

SEE ALSO:

[Onboard a Retail Customer with an Interactive Email Form](#)

## Visualize Automation History

View your automations over time and improve overall automation health using the new automation history dashboard. Get information about automation status, low success rates, and high skip or error counts. Access the report on the new History tab in Automation Studio. This feature is available only in English.

**Where:** This change applies to all Marketing Cloud Engagement editions.

**When:** This feature is available on a rolling basis starting in June 2024.

SEE ALSO:

[Salesforce Help: Automation History and Health \(can be outdated or unavailable during release preview\)](#)

## Copy Large Datasets Efficiently in Automation Studio

Use the improved Data Copy or Import activity—previously called the Import File activity—to copy large datasets by using a data extension as the source. The updated copy activity eliminates the need to create SQL queries for copying data. Existing Import File activities are now labeled Data Copy or Import, but their behavior is unaffected.

**Where:** This change applies to all Marketing Cloud Engagement editions.

**When:** This feature is available on a rolling basis starting in June 2024.

SEE ALSO:

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

## Fine-Tune Permissions for SFTP Users

Improve security by granting your SFTP users different levels of access. At the user level, assign access to view, edit, download from, and upload to top-level SFTP folders. You can also apply an additional layer of access by customizing each user's home directory.

**Where:** This change applies to all Marketing Cloud Engagement editions.

**When:** This feature is available on a rolling basis starting in May 2024.

SEE ALSO:

[Salesforce Help: Manage Marketing Cloud Engagement SFTP Accounts \(can be outdated or unavailable during release preview\)](#)

## Plan Automations Based on Start-Time Scheduling Recommendations

Automation Studio experiences significant traffic during the beginning of the hour (:00) and middle (:30). Use start-time scheduling recommendations to help you plan automation start times and distribute tasks to more efficient periods. Existing automation schedules are unaffected, and you can continue to specify the exact start time.

**Where:** This change applies to all Marketing Cloud Engagement editions.

**When:** This feature is available on a rolling basis starting in June 2024.

The screenshot shows the 'Define Schedule' dialog box. It contains the following information:

- Start Date:** 05/14/2024
- Start Time:** 12:00 AM
- Recommended Time:** 12:14 AM (with a 'Use Recommended Time' button)
- Time Zone:** ((GMT+05:30) Chennai, Kolkata, Mumbai, New Delhi)
- Repeat:** None (run once)

SEE ALSO:

[Salesforce Help: Configure a Scheduled Automation \(can be outdated or unavailable during release preview\)](#)

## Repeat Automations More Frequently

Schedule automations that repeat as often as every 15 minutes. Previously, the minimum interval for a scheduled automation was 1 hour.

**Where:** This change applies to all Marketing Cloud Engagement editions.

**When:** This feature is available on a rolling basis starting in May 2024.

The screenshot shows the 'Define Schedule' dialog box with the following configuration:

- Start Date:** (empty)
- Start Time:** 12:00 AM
- Time Zone:** ((GMT-08:00) Pacific Time (US & Canada))
- Repeat:** Minutes every 15 minute(s)
- End:** After 1 occurrence(s)

SEE ALSO:

[Salesforce Help: Configure a Scheduled Automation \(can be outdated or unavailable during release preview\)](#)

## Get More Insights About Your Automation Health and History

The health and history report provides more details about your automations. You can now see the source, creation date, frequency, and the most recent run date and time.

**Where:** This change applies to all Marketing Cloud Engagement editions.

**When:** This feature is available on a rolling basis starting in June 2024.

SEE ALSO:

[Salesforce Help: Automation History and Health \(can be outdated or unavailable during release preview\)](#)

## Secure Event Notification Service Connections with OAuth 2.0 with Assertion Authentication

Use OAuth 2.0 with assertion to authenticate using a JSON Web Token (JWT) to securely connect to Event Notification Service before pushing event notifications to webhooks. Assertion authentication enhances the existing authentication options. Use the ENS Authentication API to implement OAuth 2.0 with assertion.

**Where:** This change applies to all Marketing Cloud Engagement editions.

**Who:** To access Event Notification Service settings, you need the Event Notification Service permissions.

## Monitor Event Notification Service Callbacks Using Alert Manager

Alert Manager now notifies you whenever a server-side issue with an ENS callback occurs, giving you instant and transparent insight into ENS health. The Alert Manager integration enables you to fall back to alternative reporting methods during ENS outages.

**Where:** This change applies to all Marketing Cloud Engagement editions.

**Who:** Users with Administrator and Event Notification Service permissions can set up ENS callback status alerts in Alert Manager.

## Social Studio Is Being Retired

Social Studio is being retired on November 18, 2024. When your existing contract ends or on November 18, 2024, whichever comes first, you can no longer access Social Studio. Your customer data will be deleted 90 days later in compliance with the Salesforce Marketing Cloud Security, Privacy, and Architecture (SPARC) documentation. To switch to another approved Salesforce product, contact your account executive.

**Where:** This change applies to the Social Studio family of products: Social Studio, Command Center, Social Studio Mobile App, Social Studio Automate, and Social Customer Service (including the free Starter Pack offering).

**How:** We recommend that you retrieve your data 90 days before November 18, 2024 or the end of your contract, whichever is first. To retrieve your Social Studio data, see [Social Studio Data Extracts](#).

SEE ALSO:

[Knowledge Article: Marketing Cloud Social Studio Retirement \(can be outdated or unavailable during release preview\)](#)

[External Link: Salesforce Marketing Cloud Security, Privacy, and Architecture \(SPARC\) \(can be outdated or unavailable during release preview\)](#)

## Cross-Cloud

Prevent sending Distributed Marketing emails that have empty text blocks.

**IN THIS SECTION:**[Prevent Email Sends with Empty Fields in Distributed Marketing](#)

Distributed Marketing admins can enable a setting that blocks email sends with empty text blocks. This setting doesn't apply to default text blocks.

[Process Builder Is Retiring for Marketing Cloud Connect](#)

To support the migration to Flow, Process Builder processes used by Marketing Cloud Connect are being automatically migrated to record-triggered flows. The migration to record-triggered flows occurs automatically for each Salesforce object when a journey that uses a Salesforce activity to access the object is stopped or published. When a Salesforce Data Entry journey is published using a Salesforce object, all journeys that depend on the same Salesforce object are migrated to record-triggered flows.

## Prevent Email Sends with Empty Fields in Distributed Marketing

Distributed Marketing admins can enable a setting that blocks email sends with empty text blocks. This setting doesn't apply to default text blocks.

**Where:** This change applies to all Marketing Cloud Engagement editions.

**SEE ALSO:**

[Add a Distributed Marketing Text Block](#)

## Process Builder Is Retiring for Marketing Cloud Connect

To support the migration to Flow, Process Builder processes used by Marketing Cloud Connect are being automatically migrated to record-triggered flows. The migration to record-triggered flows occurs automatically for each Salesforce object when a journey that uses a Salesforce activity to access the object is stopped or published. When a Salesforce Data Entry journey is published using a Salesforce object, all journeys that depend on the same Salesforce object are migrated to record-triggered flows.

**When:** If you've enabled the View All permission, the retirement is being rolled out in phases, starting after the Spring '24 release through the end of April 2024. After Process Builder is retired in an account, the migration occurs when journeys that use a Salesforce activity to access the object are stopped or published.

If you haven't enabled the View All permission, the migration starts after the Summer '24 release. Use the new Enable System Mode Flow Activation permission. Your Salesforce org and the Marketing Cloud Engagement API versions must be V60. Marketing Cloud Engagement updates to the V60 version on August 15, 2024 or after. After the proper permissions are set, the migration occurs when journeys that use a Salesforce activity to access the object are stopped or published.

**How:** To move to record-triggered flows, enable the View All or Enable System Mode Flow Activation permission for the integration user in your account. After Process Builder is retired in an account, the migration occurs when journeys that use a Salesforce Data Event to access the object are stopped or published.

## Data Management

Data extension field limits in Contact Builder are now 255 characters. Send and engagement data is now retained for 180 days.

**IN THIS SECTION:**[Maximum Length of a Data Extension Field Has Changed](#)

To improve performance when using sendable data extensions in new and existing sends and journeys, the length of the field chosen in the send relationship is now limited to 255 characters in Contact Builder. Previously, the limit was 254, but based on your feedback, the limit was increased to 255. This limit applies to new data extensions and isn't enforced in integrations using API.



### [Engagement Data Retention and Access Policy Is Changing](#)

Beginning on January 15, 2025, the retention period for send and engagement data is limited to 180 days. This policy applies to data that you retrieve using Email Studio, Analytics Builder, tracking extracts in Automation Studio, or SOAP API. Data that exceeds this retention period is deleted. If your contract is dated before April 10, 2024, your data is retained indefinitely, but the new retention policy is applied on the next contract renewal date. If your contract is dated April 10, 2024 or later, we retain the data for up to 180 days.

## Maximum Length of a Data Extension Field Has Changed

To improve performance when using sendable data extensions in new and existing sends and journeys, the length of the field chosen in the send relationship is now limited to 255 characters in Contact Builder. Previously, the limit was 254, but based on your feedback, the limit was increased to 255. This limit applies to new data extensions and isn't enforced in integrations using API.

**Where:** This change applies to all Marketing Cloud Engagement editions.

## Engagement Data Retention and Access Policy Is Changing

Beginning on January 15, 2025, the retention period for send and engagement data is limited to 180 days. This policy applies to data that you retrieve using Email Studio, Analytics Builder, tracking extracts in Automation Studio, or SOAP API. Data that exceeds this retention period is deleted. If your contract is dated before April 10, 2024, your data is retained indefinitely, but the new retention policy is applied on the next contract renewal date. If your contract is dated April 10, 2024 or later, we retain the data for up to 180 days.

**Where:** This change applies to all Marketing Cloud Engagement editions.

## Developers

Compress journey history downloads for smaller file sizes and faster retrieval. Manage data extensions using REST API. Release multiple contacts from Wait Until API Event steps in journeys. Use AMPscript to encode JWTs with RSA signatures.

### IN THIS SECTION:

#### [AMPscript RetrieveSalesforceObjects\(\) Function Rowset Limit](#)

The AMPscript `RetrieveSalesforceObjects()` function returns data from Salesforce objects based on criteria that you specify. To maximize performance, the rowset that this function generates is now limited to 1,000 rows. Previously, there was no limit to the size of the rowset.

#### [Compress Journey History Data Downloads](#)

REST API operations related to downloading journey history now support file compression. Because downloads are limited to 1 GB, a compressed 1-GB journey history data file can contain more data than an uncompressed file of the same size.

#### [Manage Data Extensions with REST API](#)

Query, create, and modify data extensions by using the Custom Objects endpoints in REST API.

#### [Release Multiple Contacts from Journey Waits Simultaneously](#)

Trigger up to 100 contacts to exit a journey wait step with a single API request. For example, you can send a shipping confirmation when a truckload of packages leaves a warehouse. This update to journey management in REST API delivers consistent performance at a higher scale compared to the existing API wait activity for Journey Builder. Previously, you made individual API requests for each contact.

#### [Use AMPscript to Encode JWTs with RSA Signatures](#)

The AMPscript `GetJWTByKeyName()` function can now encode JWT tokens with RSA signatures that use SHA-256, SHA-384, and SHA-512 hashing algorithms. Previously, the `GetJWTByKeyName()` function only supported the encoding of JWTs by using HMAC signatures.

## AMPscript RetrieveSalesforceObjects() Function Rowset Limit

The AMPscript `RetrieveSalesforceObjects()` function returns data from Salesforce objects based on criteria that you specify. To maximize performance, the rowset that this function generates is now limited to 1,000 rows. Previously, there was no limit to the size of the rowset.

**Where:** This change applies to all Marketing Cloud Engagement editions.

SEE ALSO:

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

## Compress Journey History Data Downloads

REST API operations related to downloading journey history now support file compression. Because downloads are limited to 1 GB, a compressed 1-GB journey history data file can contain more data than an uncompressed file of the same size.

**Where:** This change applies to Marketing Cloud Engagement in Corporate and Enterprise editions and to customers with the Journey Builder add-on.

**How:** When you issue a GET request to the `/interaction/v1/interactions/journeyhistory/estimate` endpoint, the output now includes a `compressedSize` attribute, which shows the file size of the requested data after applying `deflate` compression. To retrieve data, issue a POST request to the `/interaction/v1/interactions/journeyhistory/download` endpoint. Include the `accept-encoding` header in your request with a value of `gzip` or `deflate`. The API returns the requested data by using the compression method that you specified.

SEE ALSO:

[Get Journey History Download Estimate \(can be outdated or unavailable during release preview\)](#)

[Download Journey History \(can be outdated or unavailable during release preview\)](#)

## Manage Data Extensions with REST API

Query, create, and modify data extensions by using the Custom Objects endpoints in REST API.

**Where:** This change applies to all Marketing Cloud Engagement editions.

**How:** Use the `/data/v1/customobjects` endpoints to manage data extensions and add data to them.

SEE ALSO:

[Custom Object API \(can be outdated or unavailable during release preview\)](#)

## Release Multiple Contacts from Journey Waits Simultaneously

Trigger up to 100 contacts to exit a journey wait step with a single API request. For example, you can send a shipping confirmation when a truckload of packages leaves a warehouse. This update to journey management in REST API delivers consistent performance at a higher scale compared to the existing API wait activity for Journey Builder. Previously, you made individual API requests for each contact.

**Where:** This change applies to Marketing Cloud Engagement in Corporate and Enterprise editions and to customers with the Journey Builder add-on.

SEE ALSO:

[Insert Contacts into a Journey Asynchronously \(can be outdated or unavailable during release preview\)](#)

## Use AMPscript to Encode JWTs with RSA Signatures

The AMPscript `GetJWTByKeyName()` function can now encode JWT tokens with RSA signatures that use SHA-256, SHA-384, and SHA-512 hashing algorithms. Previously, the `GetJWTByKeyName()` function only supported the encoding of JWTs by using HMAC signatures.

**Where:** This change applies to all Marketing Cloud Engagement editions.

**How:** Use [Key Management in Marketing Cloud Engagement setup](#) to store an .asc file that contains your RSA private key. After you store the key, use the `GetJWTByKeyName()` function to encode JWTs.

SEE ALSO:

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

## Journeys

Specify Inbox message send times in Journey Builder. Improve journey performance with new recommendations, and add a high priority to journeys.

IN THIS SECTION:

[Give Journeys a High System Priority](#)

System priority is a relative priority between journeys that use shared system resources. In addition to the existing Low and Standard system priorities, Marketing Cloud Engagement admins can now select High priority.

[Get Useful Journey Information on the Canvas](#)

Quickly find a journey's total count of activities and get the DefinitionID of the version on the journey canvas.

[Send a Larger Volume of Emails with High-Throughput Sending](#)

To increase sending throughput by two times or more, select High-Throughput Sending for Journey Builder emails in the Journey Settings panel.

[Specify Inbox Message Send Dates in Journey Builder](#)

When defining an Inbox message for sends through Journey Builder, you can now set the start and end dates.

[Improve Journey Performance with Recommendations](#)

During journey validation, Journey Builder proactively surfaces configuration recommendations that can elevate performance. Get recommendations regarding stale content, long timeouts for custom activities, long waits at the end of a journey, and transactional journeys.

## Give Journeys a High System Priority

System priority is a relative priority between journeys that use shared system resources. In addition to the existing Low and Standard system priorities, Marketing Cloud Engagement admins can now select High priority.

**Where:** This change applies to Marketing Cloud Engagement in Corporate and Enterprise editions and to customers with the Journey Builder add-on.

SEE ALSO:

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

## Get Useful Journey Information on the Canvas

Quickly find a journey's total count of activities and get the DefinitionID of the version on the journey canvas.

**Where:** This change applies to Marketing Cloud Engagement in Corporate and Enterprise editions and to customers with the Journey Builder add-on.

**Why:** This feature helps marketers and developers more easily troubleshoot journey performance issues.

## Send a Larger Volume of Emails with High-Throughput Sending

To increase sending throughput by two times or more, select High-Throughput Sending for Journey Builder emails in the Journey Settings panel.

**Where:** This change applies to Marketing Cloud Engagement in Corporate and Enterprise editions and to customers with the Journey Builder add-on.

**When:** This feature rolled out in March 2024.

SEE ALSO:

[Salesforce Help: Journey Builder High-Throughput Sending Considerations \(can be outdated or unavailable during release preview\)](#)

## Specify Inbox Message Send Dates in Journey Builder

When defining an Inbox message for sends through Journey Builder, you can now set the start and end dates.

**Where:** This change applies to Marketing Cloud Engagement in Corporate and Enterprise editions and to customers with the Journey Builder add-on.

## Improve Journey Performance with Recommendations

During journey validation, Journey Builder proactively surfaces configuration recommendations that can elevate performance. Get recommendations regarding stale content, long timeouts for custom activities, long waits at the end of a journey, and transactional journeys.

**Where:** This change applies to Marketing Cloud Engagement in Corporate and Enterprise editions and to customers with the Journey Builder add-on.

SEE ALSO:

[Salesforce Help: Journey Builder Configuration Recommendations \(can be outdated or unavailable during release preview\)](#)

## Messaging

In MobileConnect, you can now use DLT templates and shortened SMS links with custom domains. For MobilePush, this release introduces more ENS events, improved guidance for SDK implementation, a self-diagnostic tool for troubleshooting app configurations, and the option to bring MobilePush into your Flutter apps. Additional updates to MobilePush ensure that your iOS SDKs and push notification sends to Android devices stay compliant with new privacy regulations and messaging requirements.

IN THIS SECTION:

[Shorten SMS Links in MobileConnect and Journey Builder](#)

Reduce SMS size and minimize cost by shortening SMS links with the Marketing Cloud Engagement link shortener. Measure subscriber-level engagement and campaign effectiveness through link tracking.

### [Secure a Custom Domain for SMS Link Shortening in MobileConnect](#)

Enhance subscribers' user experience and brand recognition by using a custom domain in your shortened links in Mobile Connect. To use a custom domain, shorten the links with the Marketing Cloud Engagement shortener.

### [Simplify SMS Messaging by Using DLT Templates in MobileConnect](#)

Use Digital Ledger Technology (DLT) templates to ensure that you comply with the Telecoms Regulatory Authority of India (TRAI) regulations. Simplify your campaign process and reduce spam messages by using the templates for your messages in MobileConnect and Journey Builder.

### [Add MobilePush to Your Flutter Mobile Apps](#)

Integrate MobilePush functionality, including run-time toggles and custom mobile app events, with the new MobilePush Flutter plug-in. Send personalized mobile app messages that enhance user engagement and drive business results.

### [Test and Troubleshoot Your App Configuration Using the MobilePush Diagnostic Tool](#)

Use the new, self-guided MobilePush diagnostic tool to check your app setup and troubleshoot issues related to contact and device registration and contact opt-in statuses.

### [MobilePush Developer Documentation Has Been Updated](#)

The revamped MobilePush developer documentation provides detailed examples and relevant resources to guide you in your SDK implementation journey.

### [Enhance Message Engagement Tracking with More MobilePush Events](#)

Receive near real-time updates on message delivery and engagement by subscribing to eight new MobilePush events introduced in Event Notification Service (ENS). Serve reporting and retargeting use cases by moving data off the Marketing Cloud Engagement platform at scale.

### [Stay Compliant with Apple Privacy Regulations with the New Privacy Manifest](#)

With iOS 17, Apple requires third-party SDKs to provide a privacy manifest file to better understand how third-party SDKs use data, secure software dependencies, and provide privacy protection for end users. The privacy manifest file included with MobilePush iOS SDK version 8.1.2 and SFMC SDK for iOS version 1.1.2 complies with Apple's latest privacy update for App Store submissions. It includes pre-declared data and API types used by these SDKs and the usage reasons.

### [Adopt the New Authentication Pattern for Android Applications in MobilePush](#)

The authentication pattern for Android apps integrated with Marketing Cloud Engagement is changing to stay compliant with requirements for Google Firebase Cloud Messaging. To send push notifications to Android devices after this date, admins can upload the Service Account JSON file for each active Android app before June 1, 2024.

### [Reuse Template Message Names Across Your WhatsApp Business Accounts](#)

You can now use the same template name for multiple WhatsApp Business accounts (WABAs) under the same Marketing Cloud Engagement business unit. The file names of the new templates are listed in Content Builder along with the WABA ID used during template creation to help you tell them apart. Existing template files aren't renamed.

## Shorten SMS Links in MobileConnect and Journey Builder

Reduce SMS size and minimize cost by shortening SMS links with the Marketing Cloud Engagement link shortener. Measure subscriber-level engagement and campaign effectiveness through link tracking.

**Where:** This feature is available to orgs on Hyperforce.

SEE ALSO:

[Shorten URLs in an SMS Message \(can be outdated or unavailable during release preview\)](#)

[Link Tracking \(can be outdated or unavailable during release preview\)](#)

## Secure a Custom Domain for SMS Link Shortening in MobileConnect

Enhance subscribers' user experience and brand recognition by using a custom domain in your shortened links in Mobile Connect. To use a custom domain, shorten the links with the Marketing Cloud Engagement shortener.

**Where:** This change applies to orgs using Hyperforce.

**How:** Contact your Account Executive or Salesforce Customer Support to enable this feature.

## Simplify SMS Messaging by Using DLT Templates in MobileConnect

Use Digital Ledger Technology (DLT) templates to ensure that you comply with the Telecoms Regulatory Authority of India (TRAI) regulations. Simplify your campaign process and reduce spam messages by using the templates for your messages in MobileConnect and Journey Builder.

**How:** Contact your Account Executive to enable this feature.

SEE ALSO:

[DLT Template Settings for SMS Messages in India \(can be outdated or unavailable during release preview\)](#)

[Upload a DLT Template \(can be outdated or unavailable during release preview\)](#)

[Use a DLT Template in an SMS Message \(can be outdated or unavailable during release preview\)](#)

## Add MobilePush to Your Flutter Mobile Apps

Integrate MobilePush functionality, including run-time toggles and custom mobile app events, with the new MobilePush Flutter plug-in. Send personalized mobile app messages that enhance user engagement and drive business results.

**Where:** This change applies to all Marketing Cloud Engagement editions.

**When:** The plugin is available for download on April 1, 2024.

**How:** Download and integrate the MobilePush Flutter plug-in using [Pub](#).

## Test and Troubleshoot Your App Configuration Using the MobilePush Diagnostic Tool

Use the new, self-guided MobilePush diagnostic tool to check your app setup and troubleshoot issues related to contact and device registration and contact opt-in statuses.

**Where:** This change applies to all Marketing Cloud Engagement editions.

**Who:** To use the MobilePush diagnostic tool, you need the Administer MobilePush permission.

**When:** This feature is available on a rolling basis starting in May 2024.

**How:** To access the diagnostic tool in MobilePush, go to the Administration tab and click **Settings** for the app that you want to test.

## MobilePush Developer Documentation Has Been Updated

The revamped MobilePush developer documentation provides detailed examples and relevant resources to guide you in your SDK implementation journey.

**Where:** This change applies to the MobilePush SDK developer guides.

**When:** The developer documentation site for MobilePush is available in May 2024.

SEE ALSO:

[Salesforce Developers: MobilePush](#)

## Enhance Message Engagement Tracking with More MobilePush Events

Receive near real-time updates on message delivery and engagement by subscribing to eight new MobilePush events introduced in Event Notification Service (ENS). Serve reporting and retargeting uses cases by moving data off the Marketing Cloud Engagement platform at scale.

**Where:** This change applies to all Marketing Cloud Engagement editions.

**Who:** Users with Event Notification Service permissions can configure subscriptions to consume ENS events.

**How:** You can now add these MobilePush events.

- Push Sent
- Push Not Sent
- Push Bounced
- Push Open
- In-App Delivered
- In-App Displayed
- In-App Dismissed
- Inbox Open

## Stay Compliant with Apple Privacy Regulations with the New Privacy Manifest

With iOS 17, Apple requires third-party SDKs to provide a privacy manifest file to better understand how third-party SDKs use data, secure software dependencies, and provide privacy protection for end users. The privacy manifest file included with MobilePush iOS SDK version 8.1.2 and SFMC SDK for iOS version 1.1.2 complies with Apple's latest privacy update for App Store submissions. It includes pre-declared data and API types used by these SDKs and the usage reasons.

**Where:** This change applies to all Marketing Cloud Engagement editions.

**When:** The privacy manifest mandate goes into effect on May 1, 2024.

**How:** Upgrade to MobilePush SDK for iOS version 8.1.2 and SFMC SDK for iOS version 1.1.2 to start using privacy manifests.

## Adopt the New Authentication Pattern for Android Applications in MobilePush

The authentication pattern for Android apps integrated with Marketing Cloud Engagement is changing to stay compliant with requirements for Google Firebase Cloud Messaging. To send push notifications to Android devices after this date, admins can upload the Service Account JSON file for each active Android app before June 1, 2024.

**Where:** This change applies to all Marketing Cloud Engagement editions.

**When:** Complete all uploads by June 1, 2024.

**How:** To upload Service Account JSON files, go to the Administration tab in MobilePush.

## Reuse Template Message Names Across Your WhatsApp Business Accounts

You can now use the same template name for multiple WhatsApp Business accounts (WABAs) under the same Marketing Cloud Engagement business unit. The file names of the new templates are listed in Content Builder along with the WABA ID used during template creation to help you tell them apart. Existing template files aren't renamed.

**Where:** This change applies to Marketing Cloud Engagement Corporate and Enterprise editions with WhatsApp Business Messaging.

**When:** This change applies to templates created on or after July 12, 2024.

SEE ALSO:

[Salesforce Help: Personalize Your WhatsApp Template Messages in Marketing Cloud Engagement](#)

## Marketing Cloud Intelligence

Analyze additional campaign data with Performance Max in Bing Ads, integrate Marketing Cloud Intelligence with Google Search Ads 360, get more data with additional fields in Google Display & Video 360, and understand customer behavior with LinkedIn.

IN THIS SECTION:

[Get Customer Behavior Information with the LinkedIn Company Page Connector](#)

Pull valuable information about user-generated posts when connecting to the LinkedIn API to learn more about your customers' behavior, interests, and needs.

[Leverage More Data from Google Display & Video 360](#)

Analyze customer behavior data with additional fields, including data fees, full-screen selections, video mutes and unmutes, pauses, and skips.

[Easily Integrate Marketing Cloud Intelligence with Google Search Ads 360](#)

Take advantage of a more seamless integration with less implementation, and analyze more data with additional fields.

[Drive Campaign Performance with Performance Max Data in Bing Ads](#)

Pull in Performance Max campaign data with the Bing Ads API connector and analyze all your campaign data.

### Get Customer Behavior Information with the LinkedIn Company Page Connector

Pull valuable information about user-generated posts when connecting to the LinkedIn API to learn more about your customers' behavior, interests, and needs.

**Where:** This change applies to Marketing Cloud Intelligence.

**How:** From the Connect & Mix tab, create a data stream, and search for the LinkedIn Company Page tile. Under Extended Properties, select **Get UGC Posts Data**.

### Leverage More Data from Google Display & Video 360

Analyze customer behavior data with additional fields, including data fees, full-screen selections, video mutes and unmutes, pauses, and skips.

**Where:** This change applies to Marketing Cloud Intelligence.

**How:** From the Connect & Mix tab, create a data stream, and search for the Google Display & Video 360 tile. Click **Mapping** and select the data fields you want to map.



## Easily Integrate Marketing Cloud Intelligence with Google Search Ads 360

Take advantage of a more seamless integration with less implementation, and analyze more data with additional fields.

**Where:** This change applies to Marketing Cloud Intelligence.

**How:** From the Connect & Mix tab, create a data stream, and search for the Google Search Ads 360 connector tile. Under Extended Properties, enter the custom columns in the **Saved Columns** textbox.

## Drive Campaign Performance with Performance Max Data in Bing Ads

Pull in Performance Max campaign data with the Bing Ads API connector and analyze all your campaign data.

**Where:** This change applies to Marketing Cloud Intelligence.

**How:** From the Connect & Mix tab, create a data stream, and search for the Bing Ads API connector tile. Under Extended Properties, select **Get Performance Max Campaign Data**.

## Marketing Cloud Personalization

Proactively manage more org-wide total and dataset-specific Marketing Cloud Personalization consumption metrics.

### IN THIS SECTION:

#### [Track More Marketing Cloud Personalization Product Metrics](#)

Use the Consumption report to proactively manage org-wide total and dataset-specific usage of both monthly unique visitors and named individual profile limits.

#### [Update Your Firebase Cloud Messaging API Certificate for Mobile Push](#)

Salesforce has switched support from using the Google legacy Firebase Cloud Messaging (FCM) API to the new FCM HTTP V1 API. To continue sending push notifications to mobile devices using FCM, you must generate and upload a new certificate for FCM.

## Track More Marketing Cloud Personalization Product Metrics

Use the Consumption report to proactively manage org-wide total and dataset-specific usage of both monthly unique visitors and named individual profile limits.

**Where:** This change applies to all Marketing Cloud Personalization editions.

**How:** From the Marketing Cloud Personalization main navigation menu, hover over **Reports** and select **Usage > Personalization Consumption Report**.

## Update Your Firebase Cloud Messaging API Certificate for Mobile Push

Salesforce has switched support from using the Google legacy Firebase Cloud Messaging (FCM) API to the new FCM HTTP V1 API. To continue sending push notifications to mobile devices using FCM, you must generate and upload a new certificate for FCM.

**Where:** This change applies to all Marketing Cloud Personalization editions.

**How:** Access your FCM account and create a service account configured with limited role access. Using this account, generate and upload a new certificate.

SEE ALSO:

[Salesforce Help: Complete Mobile Push Setup \(can be outdated or unavailable during release preview\)](#)

[Salesforce Developers: Marketing Cloud Personalization iOS SDK Push Notifications](#)

[Salesforce Developers: Marketing Cloud Personalization Android SDK Push Notifications](#)

## Archived Release Notes

Marketing Cloud Engagement release notes from Spring '24 and earlier are available for PDF download. Refer to help documentation for the most accurate and current information about Engagement.

| Included Releases                                                                                                                                          | PDF Link                                                                       |
|------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------|
| <ul style="list-style-type: none"> <li>• Spring '24</li> </ul>                                                                                             | <a href="#">Spring '24 Marketing Cloud Engagement Release Notes</a>            |
| <ul style="list-style-type: none"> <li>• Spring '23</li> <li>• Summer '23</li> <li>• Winter '24</li> </ul>                                                 | <a href="#">2023 Marketing Cloud Engagement Release Notes</a>                  |
| <ul style="list-style-type: none"> <li>• Spring '22</li> <li>• Summer '22</li> <li>• Winter '23</li> </ul>                                                 | <a href="#">2022 Marketing Cloud Engagement Release Notes</a>                  |
| <ul style="list-style-type: none"> <li>• Spring '22</li> <li>• Summer '22</li> <li>• Fall '22</li> <li>• Winter '23</li> </ul>                             | <a href="#">2022 Marketing Cloud Intelligence Release Notes</a>                |
| <ul style="list-style-type: none"> <li>• Fall '22</li> <li>• Winter '23</li> </ul>                                                                         | <a href="#">2022 Marketing Cloud Intelligence Data Pipelines Release Notes</a> |
| <ul style="list-style-type: none"> <li>• January 2021</li> <li>• April 2021</li> <li>• June 2021</li> <li>• August 2021</li> <li>• October 2021</li> </ul> | <a href="#">2021 Marketing Cloud Engagement Release Notes</a>                  |
| <ul style="list-style-type: none"> <li>• January 2020</li> <li>• April 2020</li> <li>• June 2020</li> <li>• August 2020</li> </ul>                         | <a href="#">2020 Marketing Cloud Engagement Release Notes</a>                  |

| Included Releases                                                                                                                                | PDF Link                                                      |
|--------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------|
| <ul style="list-style-type: none"> <li>October 2020</li> </ul>                                                                                   |                                                               |
| <ul style="list-style-type: none"> <li>January 2019</li> <li>April 2019</li> <li>June 2019</li> <li>August 2019</li> <li>October 2019</li> </ul> | <a href="#">2019 Marketing Cloud Engagement Release Notes</a> |
| <ul style="list-style-type: none"> <li>January 2018</li> <li>April 2018</li> <li>June 2018</li> <li>August 2018</li> <li>October 2018</li> </ul> | <a href="#">2018 Marketing Cloud Engagement Release Notes</a> |
| <ul style="list-style-type: none"> <li>January 2017</li> <li>March 2017</li> <li>June 2017</li> <li>August 2017</li> <li>October 2017</li> </ul> | <a href="#">2017 Marketing Cloud Engagement Release Notes</a> |

## Marketing Cloud Growth

Marketing Cloud Growth offers a number of enhancements in Summer '24, including the introduction of campaign members to build lists, external tracking options, additional Flow Builder elements, and productivity enhancements to content workspaces.

### IN THIS SECTION:

#### [Work More Efficiently with New Access Points on Campaigns](#)

Curate a customer experience by adding a templated flow to your campaign from the campaign record. Plus, preview and test your campaign content without going into Flow Builder and review campaign assets with related lists for flows.

#### [Get More Done with Updated Flow Functionality](#)

New and updated elements in Flow Builder help you automate common marketing tasks. You can create consent records from form submission, create rules that remove users from flows when they meet conditions that you specify, and maintain data hygiene with duplication checks.

#### [Build a Static List Quickly with Campaign Members](#)

Relate leads and contacts to a campaign to plan your marketing effort, report on engagement, and analyze the success of a campaign. Add leads and contacts as campaign members individually or in bulk, and then send messages to them from the campaign record. When you send to campaign members, a segment is created for you based on campaign membership.

### [Track and Use Data to Inform Your Strategy](#)

Scoring and activity data can help you make campaign decisions and optimize your marketing efforts. Assess people on engagement and fit with customizable scoring rules to help you identify your ideal customer. Plus, track web activity on sites outside of Marketing Cloud Growth when you set up external activity tracking.

### [Streamline Tasks with Content Creation Enhancements](#)

Brand creation for your emails and landing pages, including mobile-specific styles for landing pages, is now generally available. Plus, improve productivity when you clone content within your workspace or share content from one workspace to another. New text formatting options are also available to apply to your brand styles and to your content components.

### [Make Your Landing Pages More Accessible and Secure](#)

Improve the security of landing pages that have forms by adding Google reCAPTCHA, and make them easier to find with search engine optimization (SEO) properties. Before publishing, preview a landing page as a guest or authenticated user. Then when you're ready to publish, you can review the associated form and flow details and automatically activate the URL alias.

### [Manage Your SMS Request and Flow Experience](#)

You can now save your work while you're requesting a new 10-digit long code, brand, or campaign. Enable Flow for your SMS sends in Unified Messaging.

### [Save Time with Grounded Einstein AI Tools](#)

Use AI in marketing to enhance and expedite creating engaging content.

### [Other Changes in Marketing Cloud Growth](#)

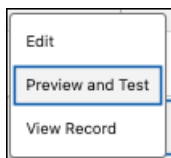
Marketing Cloud Growth offers other useful features that are automatically available with the Summer '24 release.

## Work More Efficiently with New Access Points on Campaigns

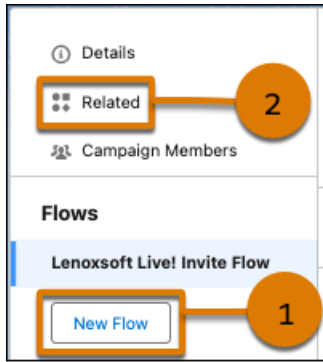
Curate a customer experience by adding a templated flow to your campaign from the campaign record. Plus, preview and test your campaign content without going into Flow Builder and review campaign assets with related lists for flows.

**Where:** These changes apply to Salesforce Enterprise and Unlimited editions with Marketing Cloud Growth edition.

**How:** To preview and test content from the campaign record, use the Preview and Test option in the content table.



To add flows to a campaign (1) or access related lists (2), use the options in the sidebar on the campaign record home. You can also customize which related lists appear on campaign records.



SEE ALSO:

[Salesforce Help: Manage Marketing Efforts with Campaigns](#) (can be outdated or unavailable during release preview)

[Salesforce Help: Customize Related Lists](#) (can be outdated or unavailable during release preview)

## Get More Done with Updated Flow Functionality

New and updated elements in Flow Builder help you automate common marketing tasks. You can create consent records from form submission, create rules that remove users from flows when they meet conditions that you specify, and maintain data hygiene with duplication checks.

**Where:** These changes apply to Salesforce Enterprise and Unlimited editions with Marketing Cloud Growth edition.

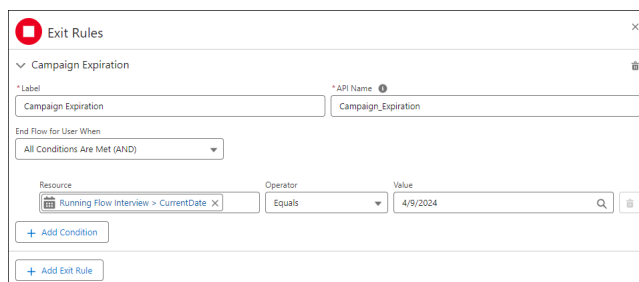
### Collect Consent with Signup Forms

Form-triggered flows have a new element. When you create a signup form campaign to collect customer data, you can now add a Create Consent Status Record element to the flow. After someone submits a form, a consent record is automatically created. This element is included by default in the signup form campaign flow.

SEE ALSO | [Salesforce Help: Signup Form Campaign Flows](#) (can be outdated or unavailable during release preview)

### Remove Users from Flows with Exit Rules

An exit rule ends a flow for people who meet one or more rule conditions. Since a person's circumstances can change over time, exit rules can be especially useful for long-running flows with Wait elements. You can create up to 10 rules in a segment-triggered flow. Select conditions using the flow's global attributes or choose data graph attributes, related attributes, or calculated insights from Data Cloud.



SEE ALSO | [Salesforce Help: Create a Rule to Remove a User from a Flow](#) (can be outdated or unavailable during release preview)

## Check for Duplicates Before Creating Records

For better data hygiene, check for records that match a set of criteria in the Create Records element. Also, specify what happens when the flow finds matching records.

SEE ALSO | [Release Notes: Check for Duplicates Before Creating Records in a Flow](#)

## Access Data Graph Attributes in Your Campaign Flows

A data graph is a collection of fields from Data Cloud data model objects that you can group for easy access and use. You can now create conditions in exit rules and Decision elements using Data Cloud data graph attributes.

SEE ALSO:

[Flow Marketing Cloud Updates](#)

## Build a Static List Quickly with Campaign Members

Relate leads and contacts to a campaign to plan your marketing effort, report on engagement, and analyze the success of a campaign. Add leads and contacts as campaign members individually or in bulk, and then send messages to them from the campaign record. When you send to campaign members, a segment is created for you based on campaign membership.

**Where:** These changes apply to Salesforce Enterprise and Unlimited editions with Marketing Cloud Growth edition.

**How:** From the lead or contact list view, select one or more records, and then use the Add to Campaign button to add them to a new or existing campaign. To add members from a campaign record, click **Campaign Members** (1), and then add either leads or contacts (2).

| Member ...                           | Is Default                          | Responded                           | Last Modif...      | Last Modified By Alias |
|--------------------------------------|-------------------------------------|-------------------------------------|--------------------|------------------------|
| 1 <input type="checkbox"/> Responded | <input type="checkbox"/>            | <input checked="" type="checkbox"/> | 12/18/2023, 12:... | admin@lenoxsoft.com    |
| 2 <input type="checkbox"/> Sent      | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | 12/18/2023, 12:... | admin@lenoxsoft.com    |

To send to campaign members, click the action menu in the Start Trigger section and select **Send to Campaign Members**.

SEE ALSO:

[Salesforce Help: Segment-Triggered Campaign Flows \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Campaign Members in Marketing Cloud Growth \(can be outdated or unavailable during release preview\)](#)

## Track and Use Data to Inform Your Strategy

Scoring and activity data can help you make campaign decisions and optimize your marketing efforts. Assess people on engagement and fit with customizable scoring rules to help you identify your ideal customer. Plus, track web activity on sites outside of Marketing Cloud Growth when you set up external activity tracking.

**Where:** These changes apply to Salesforce Enterprise and Unlimited editions with Marketing Cloud Growth edition.

### Track Engagement on External Sites

Marketing Cloud Growth can now track external web activity data, including form submissions and page views. To get started, configure external tracking in Marketing Cloud Growth Setup, and then add the generated code snippet to your website.

SEE ALSO | *Salesforce Help*: [Track Activity on External Sites](#) (can be outdated or unavailable during release preview)

### Customize Engagement and Fit Scoring Rules

Decide which criteria indicate that someone is ready to move on to the next phase of your sales funnel. Customize and build on the default scoring rules to adjust engagement and fit scores based on criteria you specify.

SEE ALSO | *Salesforce Help*: [Score People Based on Engagement and Fit](#) (can be outdated or unavailable during release preview)

SEE ALSO | *Salesforce Help*: [Page Customization in Marketing Cloud Growth](#) (can be outdated or unavailable during release preview)

## Streamline Tasks with Content Creation Enhancements

Brand creation for your emails and landing pages, including mobile-specific styles for landing pages, is now generally available. Plus, improve productivity when you clone content within your workspace or share content from one workspace to another. New text formatting options are also available to apply to your brand styles and to your content components.

**Where:** These changes apply to Salesforce Enterprise and Unlimited editions with Marketing Cloud Growth edition.

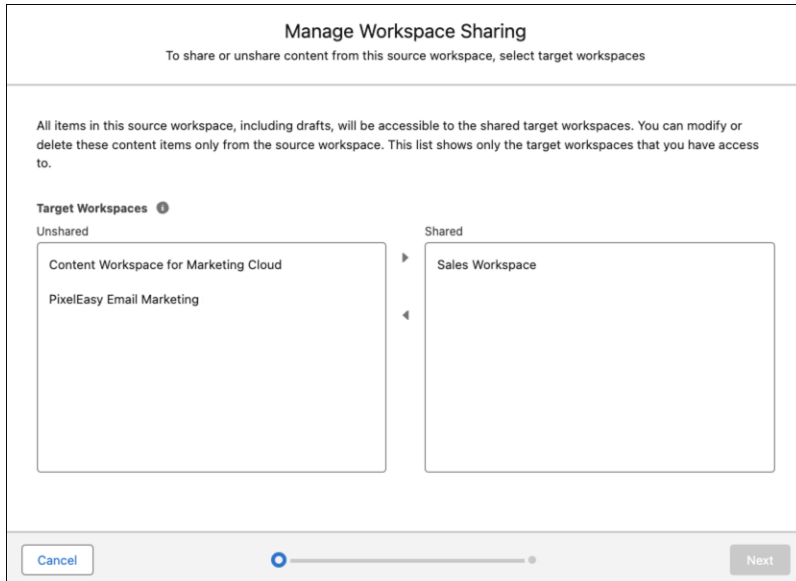
### Brand Your Content (Generally Available)

Create brand styles that content authors can easily apply to emails and landing pages. New fields give you control over spacing, borders, and text formatting, and you can specify custom sizes in pixels or rem values. In the preview panel, see your brand style updates in real time. You can create separate brand styles for the desktop and mobile versions of your landing pages. Mobile-specific brand values don't apply to emails. If you save your brand in a workspace that's shared with another workspace, you can apply the brand to an email or landing page in the shared workspace.

SEE ALSO | *Salesforce Help*: [Brand Your Content in Marketing Cloud Growth](#) (can be outdated or unavailable during release preview)

### Share Content Across Marketing Workspaces

Reuse content between workspaces without duplicating records. Work with content shared from a source workspace to a target workspace in the new Shared with Workspaces folder. After a content admin or manager configures the Workspace Settings to allow sharing, marketers can find that content in the Shared with Workspaces folder.



SEE ALSO | [Salesforce Help: Types of Content in Marketing Cloud Growth](#)

## Save Time with Content Cloning

Instead of creating a content record from scratch, make a copy of any content type and its variants. Organize content into folders, and edit cloned content for quick reuse.

SEE ALSO | [Release Notes: Save Time with Content Record Cloning in Your Enhanced CMS Workspace](#)

SEE ALSO | [Salesforce Help: Create Content in Marketing Cloud Growth](#) (can be outdated or unavailable during release preview)

## Make Your Landing Pages More Accessible and Secure

Improve the security of landing pages that have forms by adding Google reCAPTCHA, and make them easier to find with search engine optimization (SEO) properties. Before publishing, preview a landing page as a guest or authenticated user. Then when you're ready to publish, you can review the associated form and flow details and automatically activate the URL alias.

**Where:** These changes apply to Salesforce Enterprise and Unlimited editions with Marketing Cloud Growth edition.

## Boost Your Landing Page in Search Engine Results

To surface your landing page to search engine results, add it to a sitemap. For more targeted results, add SEO properties, such as a page description and the `<link>`, `<meta>`, and `<script>` head tags, to your landing page. The public page title SEO property, which appears in search results and in a user's browser tab when they visit your site, is now a required field. To use SEO properties, a content admin republishes the Marketing Landing Page site in Experience Builder.

SEE ALSO | [Salesforce Help: Working with Landing Pages in Marketing Cloud Growth](#)

SEE ALSO | [Salesforce Help: SEO Head Tags in Marketing Cloud Growth](#)

## Safeguard Landing Pages with Forms Using reCAPTCHA

Protect forms on your marketing landing pages from bots, fraudulent activities, spam, and abuse with Google reCAPTCHA. The Google reCAPTCHA v2 integration is available only for marketing landing pages with forms.



SEE ALSO | *Salesforce Help*: [Protect Forms with reCAPTCHA](#)

## Preview Landing Pages as a Guest or Authenticated User

To see how your landing page looks for a broad audience, preview it as a guest user. To see your landing page as a customer who's logged in, preview it as an authenticated user. Contributors to your Marketing workspace can preview a landing page even if they aren't contributors to the Marketing Landing Pages site.

SEE ALSO | *Release Notes*: [Preview CMS Content as a Guest or Authenticated User](#)

SEE ALSO | *Salesforce Help*: [Working with Landing Pages in Marketing Cloud Growth](#) (can be outdated or unavailable during release preview)

## See Flow Details When You Publish a Landing Page

When you publish a landing page that contains a form, you can now review the details of the flow associated with the form. See these details in a new step in the publishing process.

## Activate the URL Alias When You Publish a Landing Page

After a landing page successfully publishes, its inactive or draft URL alias automatically activates, and your public URL is live. You no longer need to visit the URL tab of the landing page content details page to complete this step.

SEE ALSO | *Salesforce Help*: [Create a Landing Page in Marketing Cloud Growth](#) (can be outdated or unavailable during release preview)

## Manage Your SMS Request and Flow Experience

You can now save your work while you're requesting a new 10-digit long code, brand, or campaign. Enable Flow for your SMS sends in Unified Messaging.

**Where:** These changes apply to Salesforce Enterprise and Unlimited editions with Marketing Cloud Growth Edition.

## Save Your SMS Drafts

To help you manage the 30-minute time frame to complete a 10-digit long code, brand, or campaign request for SMS messaging, save a draft and submit your request at another time. Your drafts are also auto-saved at 1-minute intervals so that you don't lose any of your work.

## Enable SMS Usage in Flow for Unified Messaging

In Unified Messaging Setup, specify that a specific SMS code can send and receive SMS messages using Flow. This capability enables Flow to perform the sending tasks necessary to maintain a conversation with your customers.

## Save Time with Grounded Einstein AI Tools

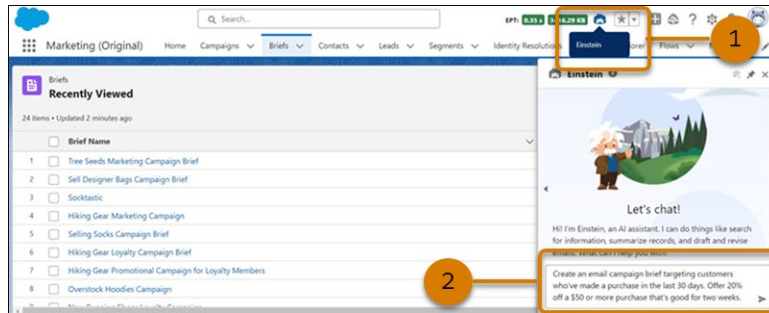
Use AI in marketing to enhance and expedite creating engaging content.

**Where:** This change applies to Salesforce Enterprise and Unlimited editions with Marketing Cloud Growth edition.

## Create On-Brand Campaigns with Einstein Copilot

Copilot helps boost your efficiency by generating draft campaign briefs, messaging, and branded content. To give users access to Einstein Copilot, assign the Use Einstein Copilot system permission. On pages where Copilot is available, click the Einstein icon (1) and provide instructions in the chat window (2).

**When:** Einstein Copilot will be generally available in Marketing Cloud in September 2024.



If you're already using Einstein Co-Create, you must make a couple of changes to start using Copilot.

SEE ALSO | [Salesforce Help: Enable Einstein Features in](#) (can be outdated or unavailable during release preview)

SEE ALSO | [Salesforce Help: Einstein Copilot in](#) (can be outdated or unavailable during release preview)

## Use New Branding Fields to Generate and Revise Content with Einstein

In the branding section of the content builder, enter your company's brand identity and select a default tone. Einstein uses this information to generate new content that reflects your company's distinct personality and voice. In the content builder, you can also ask Einstein to revise content based on a different tone. For example, if your company's default tone is Professional, but you want an email to sound informal, ask Einstein to revise the email using the Casual tone.

The screenshot shows the Salesforce interface for configuring brand identity and tone. At the top, there is a navigation bar with a back arrow, the word 'Brand', and a document icon labeled 'Capricorn Coffee Main Brand'. Below this is a 'Desktop' view selector. The main content area is divided into two sections: 'Brand Identity' and 'Brand Tone'.

**Brand Identity**  
 Describe your brand and what sets you apart. Einstein uses this information to create engaging content that aligns with your brand's style.  
 A text box contains the following text: "Capricorn Coffee connects small-scale growers of organic coffee from around the world with coffee drinkers in the US. We focus on fair trade and high quality, offering exclusive coffee blends, single-source coffee, and a variety of coffee makers." A character count '246/250' is visible at the bottom right of the text box.

**Brand Tone**  
 Einstein uses your default tone to generate new content. Edit the description of a tone to adjust the nature of the output. In Einstein Copilot, content authors can select a different tone when they refine the generated text.

Four tone options are displayed in a grid:

- Professional** (Default): A formal style that gets straight to the point. The professional style uses intensifiers and adjectives sparingly, and asks questions only when necessary. This style avoids idioms and other unclear words and phrases.
- Casual**: A conversational style that helps build closeness with the reader. The casual style uses intensifiers and exclamation points to express enthusiasm. It also uses words and phrases that are common in spoken language.
- Urgent**: A style that uses clear, concise language and time-sensitive words. The urgent style prioritizes deadlines or actions. To maintain trust and not appear aggressive, this style avoids overuse of capital letters and exclamation points.
- Inquisitive**: A style that poses open-ended questions relevant to the recipient's interests or needs. The inquisitive style seeks to pique curiosity without being too complex. To foster engagement and a desire to learn more, this style ensures that the generated content provides an answer or solution to the question posed.

SEE ALSO | [Salesforce Help: Brand Your Content in](#) (can be outdated or unavailable during release preview)

## Get More Relevant Output from Einstein AI with Data Prism

Einstein Data Prism now generates more accurate and relevant Einstein segments. Data Prism enriches the Data Cloud schema with semantic descriptions by correlating the natural language phrases used in segment creation and your Data Cloud data. This functionality is enabled when you turn on Einstein Segment Creation.

**When:** This functionality begins rolling out in September 2024.

## Other Changes in Marketing Cloud Growth

Marketing Cloud Growth offers other useful features that are automatically available with the Summer '24 release.

**Where:** These changes apply to Salesforce Enterprise and Unlimited editions with Marketing Cloud Growth edition.

## Setup Experience Was Reorganized

The new setup experience guides you through the required and recommended tasks to begin using Marketing Cloud Growth. Find the updates on the Assistant Home page in Salesforce Setup.

SEE ALSO | *Salesforce Help:* [Getting Started with Marketing Cloud Growth Setup](#) (can be outdated or unavailable during release preview)

## Data Kits and Analytics Packages Were Updated

To support the latest features, we updated data kits and analytics packages to include new data streams and other enhancements. First, reinstall the Marketing Setup Objects data kit and redeploy it in Data Cloud. Then install the Flow Reports analytics package.

SEE ALSO | *Salesforce Help:* [Install and Deploy Data Streams](#) (can be outdated or unavailable during release preview)

## Manually Update Consent on Lead and Contact Records

If you receive an unsubscribe request directly, you can now manually adjust the consent status from a lead or contact record. On the Consent Status component, use the action menu for a communication subscription to update the consent status. To get this functionality, an admin must add the Marketing Consent Status component to lead and contact records.

SEE ALSO | *Salesforce Help:* [Review Marketing Consent Data](#) (can be outdated or unavailable during release preview)

## Personalize Messages and Experiences with Related Data

Now you have more ways to personalize your marketing efforts. With a data graph, you can set Unified Individual as the primary object, then add other objects and fields as related attributes. After the data graph is deployed and enabled, the attributes and fields you selected are available as merge fields and in flow Decision elements.

SEE ALSO | *Salesforce Help:* [Configure a Data Graph to Personalize Messages](#) (can be outdated or unavailable during release preview)

## Route Your Incoming Email with Reply Mail Management

Reply mail management helps you route email messages that are sent to your sending domain. Select an email inbox that can receive incoming emails and decide what to do with those messages. You can configure an automatic response to incoming messages, and choose whether to delete out-of-office messages and automatic replies.

## Personalize Your Email with Custom Domain Links

Select a custom domain that is applied to all URLs that you include in your email content. These custom domains help improve message deliverability and improve click-through rates.

## API Name Field Added to Marketing Workspaces, Form, and Image Content

You can now use API names as a developer-friendly way to identify marketing workspaces, forms, and images. An API name is required for workspaces and is generated for content unless you enter a custom one. After you save the workspace or content, you can't change its API name. The API name for the default Content Workspace for Marketing Cloud is Default\_Content\_Workspace.

SEE ALSO | *Release Notes:* [Add an API Name to New Enhanced CMS Workspaces and Content](#) (can be outdated or unavailable during release preview)

## Jump-start Your Campaign Using a Brief

To plan your key message and audience, create a brief. Then associate it with a campaign.

## Add Segments to a Campaign

When you create a campaign with Einstein, you can choose how to create an associated segment. Let Einstein generate a segment, select an existing segment, or choose to create it manually.

# Unified Messaging

Unified Messaging consolidates customer communication channels, like email, SMS, and WhatsApp, into one unified platform. You can now bring your existing WhatsApp number into Unified Messaging. Improve the customer support experience in Journey Builder with new tools.

### IN THIS SECTION:

#### [Merge Marketing and Service by Migrating from WhatsApp-First Business Messaging to Unified Messaging](#)

In Unified Messaging, service and marketing interactions occur in one channel. Previously, you couldn't create unified WhatsApp channels with a number that was associated with a Marketing Cloud Engagement WhatsApp channel. Now, when you migrate from a WhatsApp-First or externally provided WhatsApp channel to a unified WhatsApp channel, your messaging history and most channel settings are preserved. You also get access to Unified Messaging features such as Data Cloud reporting.

#### [Transfer a WhatsApp Conversation from Marketing Cloud Engagement to Service Cloud with Journey Builder](#)

You can transfer a WhatsApp conversation from a Marketing Cloud Engagement interaction to a Service Cloud interaction. Place the WhatsApp Session Transfer activity after a Wait Until Chat Response or an Inbound Chat activity. The information passed as part of the transfer includes conversation history, journey data, the recipient's WhatsApp number, and the cross-cloud WhatsApp phone number.

#### [View Analytics for the WhatsApp Session Transfer Activity in Journey Builder](#)

Learn how customers interact with your WhatsApp journeys and why they're transferred to support with the Session Transfer analytics dashboard. Use this dashboard to view the number of total, successful, and failed transfers from Marketing Cloud Engagement interactions to Service Cloud support, and learn more about each transfer. This information can help you identify areas where you can improve your customer experience.

#### [Suppress Promotional WhatsApp Messages During Support Interactions with Journey Builder](#)

For WhatsApp numbers in Unified Messaging, control whether a Marketing Cloud Engagement message is sent to a customer engaged in an active or open Service Cloud support conversation. This feature prevents customers from receiving promotional or other low-priority content while they work with support and ensures they receive only relevant messages.

#### [Expand the Data Available for Your WhatsApp Engagement Queries in Unified Messaging](#)

You can now include Correlation ID, Sender Display Name, and Interactive Content Type information in your WhatsApp engagement queries. Use the information from your queries to better refine and target your communications with subscribers. For example, segment recipients who received a specific type of interactive content or who received messages as part of a specific send.

#### [Configure Customer Consent for Unified WhatsApp Messages in Flow](#)

Respect consent preferences by sending WhatsApp messages to only the customers who opt in to receiving them. You can now specify a subscription when you configure WhatsApp message flow elements in Service Cloud Digital Engagement. You can also change consent validation for active WhatsApp message flow elements. To enable these options, install all the managed packages for WhatsApp Setup, and turn on the Activate Customer Conversation Engagement capability.

## Merge Marketing and Service by Migrating from WhatsApp-First Business Messaging to Unified Messaging

In Unified Messaging, service and marketing interactions occur in one channel. Previously, you couldn't create unified WhatsApp channels with a number that was associated with a Marketing Cloud Engagement WhatsApp channel. Now, when you migrate from a WhatsApp-First or externally provided WhatsApp channel to a unified WhatsApp channel, your messaging history and most channel settings are preserved. You also get access to Unified Messaging features such as Data Cloud reporting.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions with the Marketing Cloud Engagement add-on.

**How:** To migrate a WhatsApp channel, contact your Salesforce account executive to purchase Unified Messaging. Then, go to the Your Numbers page in Setup under WhatsApp. Click **Add Number** and follow the prompts to add the number that was previously in use in Marketing Cloud Engagement.



**Warning:** When you bring a WhatsApp number from a Marketing Cloud Engagement channel to a unified channel, it's a one-way move. You can't move the number back to its original channel in the future.

### SEE ALSO:

[Merge Marketing and Service by Migrating from Enhanced WhatsApp to Unified Messaging](#)

[Salesforce Help: WhatsApp Unified Messaging Channel Capabilities \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Number Reuse and Migration in WhatsApp Unified Messaging \(can be outdated or unavailable during release preview\)](#)

## Transfer a WhatsApp Conversation from Marketing Cloud Engagement to Service Cloud with Journey Builder

You can transfer a WhatsApp conversation from a Marketing Cloud Engagement interaction to a Service Cloud interaction. Place the WhatsApp Session Transfer activity after a Wait Until Chat Response or an Inbound Chat activity. The information passed as part of the transfer includes conversation history, journey data, the recipient's WhatsApp number, and the cross-cloud WhatsApp phone number.

### SEE ALSO:

[Salesforce Help: Create a WhatsApp Session Transfer Activity \(can be outdated or unavailable during release preview\)](#)

## View Analytics for the WhatsApp Session Transfer Activity in Journey Builder

Learn how customers interact with your WhatsApp journeys and why they're transferred to support with the Session Transfer analytics dashboard. Use this dashboard to view the number of total, successful, and failed transfers from Marketing Cloud Engagement interactions to Service Cloud support, and learn more about each transfer. This information can help you identify areas where you can improve your customer experience.

**Where:** This change applies to Marketing Cloud Engagement Corporate and Enterprise editions with Unified Messaging.

**How:** To view the analytics dashboard in Journey Builder, click the WhatsApp Session Transfer activity.

### SEE ALSO:

[Salesforce Help: Create a WhatsApp Session Transfer Activity \(can be outdated or unavailable during release preview\)](#)

## Suppress Promotional WhatsApp Messages During Support Interactions with Journey Builder

For WhatsApp numbers in Unified Messaging, control whether a Marketing Cloud Engagement message is sent to a customer engaged in an active or open Service Cloud support conversation. This feature prevents customers from receiving promotional or other low-priority content while they work with support and ensures they receive only relevant messages.

**Where:** This change applies to Marketing Cloud Engagement Corporate and Enterprise editions with Unified Messaging.

**How:** To choose if and when a message sends, go to the Message Configuration section of a WhatsApp activity and select a value from the Messaging Timing dropdown list.

SEE ALSO:

[Salesforce Help: Set Up a WhatsApp Unified Messaging Channel \(can be outdated or unavailable during release preview\)](#)

## Expand the Data Available for Your WhatsApp Engagement Queries in Unified Messaging

You can now include Correlation ID, Sender Display Name, and Interactive Content Type information in your WhatsApp engagement queries. Use the information from your queries to better refine and target your communications with subscribers. For example, segment recipients who received a specific type of interactive content or who received messages as part of a specific send.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions with the Marketing Cloud Engagement add-on.

SEE ALSO:

[Salesforce Help: WhatsApp Engagement Data in Unified Messaging \(can be outdated or unavailable during release preview\)](#)

## Configure Customer Consent for Unified WhatsApp Messages in Flow

Respect consent preferences by sending WhatsApp messages to only the customers who opt in to receiving them. You can now specify a subscription when you configure WhatsApp message flow elements in Service Cloud Digital Engagement. You can also change consent validation for active WhatsApp message flow elements. To enable these options, install all the managed packages for WhatsApp Setup, and turn on the Activate Customer Conversation Engagement capability.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions with the Marketing Cloud Engagement add-on.

SEE ALSO:

[Set App-Specific Consent Levels in Unified Messaging \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Manage WhatsApp Consent in Unified Messaging](#)

[Salesforce Help: Understanding Consent Concepts in Marketing Cloud Growth](#)

## MuleSoft

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Use the MuleSoft Anypoint Platform suite of products to connect and integrate apps, systems, and data across your enterprise. Streamline operations by building and automating processes with clicks instead of code. You can design, develop, govern, and share APIs and integration apps and host them in the cloud or on-premises.

- The [Mulesoft Release Notes](#) are organized by product.

- The [MuleSoft Release Note Summary by Month](#) is organized by latest updates.

To learn more about MuleSoft products, see [MuleSoft Documentation](#).

## Mobile

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Configure offline landing pages without code using Mobile Builder for Salesforce Mobile App, which is now generally available. Improve your Mobile Publisher app with new security features and prepare your app for new notification and device operating system requirements. Submit the required Firebase information for push notifications on Android mobile connected apps.

### IN THIS SECTION:

#### [Salesforce Mobile App](#)

Create custom offline landing pages with Mobile Builder for Salesforce Mobile App, which is now generally available. Customer service agents can now message customers from the Salesforce mobile app through Service Cloud's enhanced messaging channels and Messaging for In-App and Web.

#### [Mobile Publisher](#)

Enhance your Mobile Publisher app with new security features, such as user opt-in biometric login (beta) and custom mobile security policies. To meet Google's requirements for push notifications on Android, submit your app's Firebase information. Prepare your Mobile Publisher for Experience Cloud app users to update their devices to Android 8 or iOS 16 and later.

#### [General Mobile Updates](#)

Enter the required Google Firebase information to support push notifications on Android mobile connected apps.

## Salesforce Mobile App

Create custom offline landing pages with Mobile Builder for Salesforce Mobile App, which is now generally available. Customer service agents can now message customers from the Salesforce mobile app through Service Cloud's enhanced messaging channels and Messaging for In-App and Web.

### IN THIS SECTION:

#### [Everything That's New in the Salesforce Mobile App](#)

Our latest round of new and improved Salesforce mobile app features makes it easier to access Salesforce on the go.

## Everything That's New in the Salesforce Mobile App

Our latest round of new and improved Salesforce mobile app features makes it easier to access Salesforce on the go.

The new Salesforce mobile app is available for all editions, except Database.com, without an additional license. Your org's Salesforce edition and licenses, as well as a user's assigned profile and permission sets, determine the Salesforce data and features that are available to each user.

Most features become available for the Salesforce mobile app the week of June 17, 2024.

**Salesforce App Enhancements and Changes**

**Salesforce for  
Android**

**Salesforce for  
iOS**

**Set Up in  
the Full  
Site**

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**Einstein**



| Salesforce App Enhancements and Changes                                                               | Salesforce for Android | Salesforce for iOS | Set Up in the Full Site |
|-------------------------------------------------------------------------------------------------------|------------------------|--------------------|-------------------------|
| <a href="#">Access the Recent Activity Timeline on the Salesforce Mobile App with Copilot Enabled</a> | ✓                      | ✓                  | ✓                       |
| <b>Customer Service Features</b>                                                                      |                        |                    |                         |
| <a href="#">Message Customers in the Salesforce Mobile App (Beta)</a>                                 | ✓                      | ✓                  | ✓                       |
| <b>Offline Access</b>                                                                                 |                        |                    |                         |
| <a href="#">Configure Offline App Landing Pages Easily with Mobile Builder (Generally Available)</a>  | ✓                      | ✓                  |                         |
| <a href="#">Keep Working While Your Records Download with Background Priming (Beta)</a>               | ✓                      | ✓                  |                         |

## Hide Global Search for Specific Lightning Apps

Give your users a more focused experience by hiding the global search for specific Lightning apps in your org. When they switch to another app, the search bar is visible again.

**Where:** This change applies to mobile connected apps. Connected apps can be created in Group, Professional, Enterprise, Essentials, Performance, Unlimited, and Developer editions.

**How:** This feature is enabled through a connected app setting, which you configure. The setting, `HIDE_SEARCH_ICON_FOR_LIGHTNING_APP`, accepts one or more app developer names as its value.

To see your lightning app developer names, open Lightning Experience App Manager.

SEE ALSO:

[Salesforce Help: Control Access and Security for the Salesforce Mobile App](#)

## Configure Offline App Landing Pages Easily with Mobile Builder (Generally Available)

With Mobile Builder for Salesforce Mobile App you can customize offline landing pages for your mobile users without writing a single line of code. Now you can show the most important records to your mobile users so they can quickly and easily take relevant actions based on their use cases. Mobile Builder was beta in Spring '24 and is now generally available.

**Where:** These changes apply to Salesforce Mobile App Plus for Android and iOS on phones and tablets in all editions, except Database.com.

**Who:** Mobile Builder is available to users in orgs with the Salesforce Mobile App Plus license who have the user permission Mobile Offline for Salesforce Mobile App Plus.

**How:** From Setup, in the Quick Find box, enter *Mobile Builder*, and then select **Mobile Builder for Salesforce Mobile App**. Create configurations, assign them to user profiles, and publish.

SEE ALSO:


[Salesforce Help: Customize with Mobile Builder \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Salesforce Mobile App Plus \(can be outdated or unavailable during release preview\)](#)

## Keep Working While Your Records Download with Background Priming (Beta)

Now when you download records for offline use, that process happens in the background and you can continue using your mobile device uninterrupted. Take a phone call, schedule a meeting, or even lock your device and take a break. The app notifies you when the download is complete and you're ready to work 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.

 **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 Offline 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:** To participate in this beta program, contact your customer success representative or account executive.

SEE ALSO:

[Salesforce Help: Get Started With Mobile Offline \(can be outdated or unavailable during release preview\)](#)

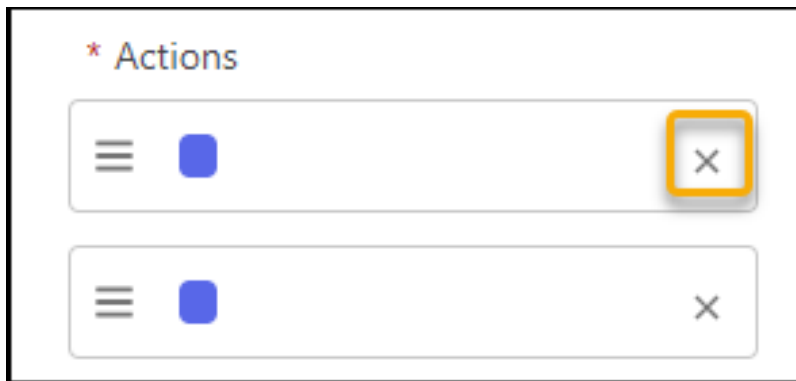
## See Only Actions You Can Use in Mobile Builder

The Salesforce Mobile app supports only Lightning Web Component (LWC) global actions. When you configure a landing page in Mobile Builder and add actions in the actions card, non-LWC actions are now automatically filtered out. This way, you only add actions that are supported.

**Where:** These changes apply to Salesforce Mobile App Plus for Android and iOS on phones and tablets in Developer, Enterprise, and Unlimited editions.

**Who:** Mobile Builder is available to users in orgs with the Salesforce Mobile App Plus license who have the user permission Mobile Offline for Salesforce Mobile App Plus.

**How:** If you previously had non-LWC actions in your Mobile Builder landing page, they didn't display to your users on your offline landing page, they only displayed in Mobile Builder. They now appear blank in Mobile Builder, and you can remove them.



SEE ALSO:

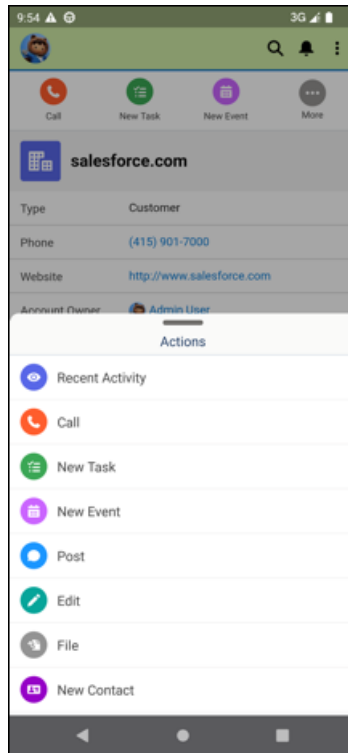
[Salesforce Help: Quick Actions](#)

## Access the Recent Activity Timeline on the Salesforce Mobile App with Copilot Enabled

The Salesforce mobile app now shows your Recent Activity timeline for leads, opportunities, accounts, and contacts, even when Einstein Copilot is enabled. Previously, you couldn't access the Recent Activity timeline.

**Where:** This change applies to 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.

**How:** For iOS and Android devices, the Recent Activity timeline is part of the overflow menu on a record page, if there are more than 4 actions in the action bar. If there are fewer than 4 actions, the Recent Activity timeline is visible on the action bar. If Einstein Copilot isn't enabled, the Recent Activity timeline is accessible at the bottom of the app.



## Message Customers in the Salesforce Mobile App (Beta)

Modernize your customer service by letting agents message customers from the Salesforce mobile app. Previously, agents had to be signed in to Omni on the Salesforce agent console to engage in conversations.

**Where:** This change applies to all enhanced messaging channels and Messaging for In-App and Web. [View required 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 after June 15, 2024.

**Who:** Users with a Messaging User permission set license can message customers in the Salesforce app.

**Why:** Gone are the days of requiring agents to sign in to the agent console to message customers. Some of our customers work in face-to-face environments like real estate or rideshare where a computer isn't available. Some of our customers want to be available all the time, even when they're away from a computer. Some of our customers work in highly regulated industries where they need to use an approved device to have 1:1 engagements with their clients in a compliant way. We offer messaging in the Salesforce app as a solution to the evolving landscape of human connectedness.

**How:** To accept or send messages, agents sign in to the Salesforce app and make themselves available in the Omni widget.

SEE ALSO:

[Salesforce Help: Message Customers in the Salesforce Mobile App](#)

## Mobile Publisher

Enhance your Mobile Publisher app with new security features, such as user opt-in biometric login (beta) and custom mobile security policies. To meet Google's requirements for push notifications on Android, submit your app's Firebase information. Prepare your Mobile Publisher for Experience Cloud app users to update their devices to Android 8 or iOS 16 and later.

IN THIS SECTION:

[Submit Your Mobile Publisher Android App's Required Firebase Information Before June](#)

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 before June 2024.

[Mobile Publisher Android Apps with Managed Public Distribution Are No Longer Updated](#)

Mobile Publisher retired Android app distribution through the Managed Public option in Winter '23. Existing Mobile Publisher Android apps distributed with the Managed Public option continue to work but no longer receive app updates in Summer '24 and later releases. We recommend that you transfer your app to your own Google Play account for Delegated Public or Delegated Private distribution as soon as possible.

[Experience Cloud Apps Now Require Android 8 or iOS 16 and Later](#)

Starting in app version 12.2, Mobile Publisher for Experience Cloud apps no longer support devices with Android 7 and earlier or devices with iOS 15 and earlier. To install a Mobile Publisher for Experience Cloud app in version 12.2 or later, devices must be updated to at least Android 8 or iOS 16.

[Set Up Opt-In Biometric Login for Fast and Secure Experience Cloud App Logins \(Beta\)](#)

With User Opt-In Biometric Login (beta), you can now set your Mobile Publisher for Experience Cloud app to let users opt in to using biometric credentials (face or fingerprint recognition) to log in. After a user first logs in to the app with their username and password, they can opt in to using their biometric credentials for future logins. Previously, if you enabled biometric app unlock for logging in to your app, users couldn't log in to your app without using biometric credentials.

[Configure How Your Experience Cloud App Responds to Security Threats](#)

With Enhanced Mobile App Security, you can customize how your Mobile Publisher for Experience Cloud app responds to security threats. Set your app to detect security threats, such as a jailbroken device or a man-in-the-middle attack. Then configure the severity level of how your app automatically responds when the threat is detected.

[Binary Upload Is the Default Distribution Method for New Mobile Publisher Apps](#)

When you create a project in Setup for Mobile Publisher, you select an App Distribution Method. You choose whether you submit your app for Apple or Google review (Binary Upload), or if Salesforce submits your app for review (Fully Managed). Binary Upload is now the default App Distribution Method for new Mobile Publisher apps. The Fully Managed option is still available, and there's no change to existing apps.

[Add Links to an Experience Cloud iOS App's Login Page](#)

Mobile Publisher for Experience Cloud iOS apps now support links from the app's login page. Use your app's login screen to point your users to important pages, such as your app's privacy policy or terms and conditions. Mobile Publisher for Experience Cloud Android apps support links on the login page in app versions 11.3 and later.

### [Set the Default Method for How Your Experience Cloud App Opens External URLs \(Generally Available\)](#)

The default experience is that your Experience Cloud site's URLs open in the in-app web view, while all URLs external to your site open in the in-app browser. You can now choose how your app opens all URLs external to your site, without having to configure each individual URL. You can configure all external URLs to open 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. Setting the default method for opening external URLs is now also supported for Messaging for In-App and Web in Service Cloud.

### [Simplify Site Navigation on Mobile Publisher for LWR Sites \(Beta\)](#)

Give your customers easier navigation by showing the hamburger menu and back button in Mobile Publisher for Experience Cloud apps on the LWR platform. To customize these navigation options for your LWR site, use the new `getNavigationConfig` wire adapter. The wire adapter exposes properties that enable or disable the hamburger menu and back button for Android and iOS apps.

### [Privacy Manifests Are Now Generated for Experience Cloud iOS Apps](#)

Apple now requires privacy manifest files, which describe how your app and third-party SDKs collect and use app-user data. Mobile Publisher for Experience Cloud now generates this file on your behalf and uploads the file to your App Store account. There are no changes to the user experience of your app.

## Submit Your Mobile Publisher Android App's Required Firebase Information Before June

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 before June 2024.

**Where:** This change applies to Mobile Publisher for Experience Cloud and Mobile Publisher for Salesforce Mobile App Plus Android apps. 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](#)

## Mobile Publisher Android Apps with Managed Public Distribution Are No Longer Updated

Mobile Publisher retired Android app distribution through the Managed Public option in Winter '23. Existing Mobile Publisher Android apps distributed with the Managed Public option continue to work but no longer receive app updates in Summer '24 and later releases. We recommend that you transfer your app to your own Google Play account for Delegated Public or Delegated Private distribution as soon as possible.

**Where:** This change applies to Mobile Publisher Android apps distributed through the legacy Managed Public option. Setup for Mobile Publisher is available in Lightning Experience in Enterprise, Performance, and Unlimited editions.

SEE ALSO:

[Knowledge Article: Mobile Publisher Android - Managed Public Retirement](#)

## Experience Cloud Apps Now Require Android 8 or iOS 16 and Later

Starting in app version 12.2, Mobile Publisher for Experience Cloud apps no longer support devices with Android 7 and earlier or devices with iOS 15 and earlier. To install a Mobile Publisher for Experience Cloud app in version 12.2 or later, devices must be updated to at least Android 8 or iOS 16.


**Where:** This change applies to apps created with Mobile Publisher for Experience Cloud [Aura and LWR sites](#) in Enterprise, Performance, Unlimited, and Developer editions.

SEE ALSO:

[Salesforce Help: Requirements for Mobile Publisher for Experience Cloud \(can be outdated or unavailable during release preview\)](#)

## Set Up Opt-In Biometric Login for Fast and Secure Experience Cloud App Logins (Beta)

With User Opt-In Biometric Login (beta), you can now set your Mobile Publisher for Experience Cloud app to let users opt in to using biometric credentials (face or fingerprint recognition) to log in. After a user first logs in to the app with their username and password, they can opt in to using their biometric credentials for future logins. Previously, if you enabled biometric app unlock for logging in to your app, users couldn't log in to your app without using biometric credentials.

 **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 Mobile Publisher for Experience Cloud app versions 12.2 and later.

**How:** From Setup, in the Quick Find box, enter *Connected App*, and then select **Manage Connected Apps**. Find your Mobile Publisher for Experience Cloud app's connected app, and then add custom attributes that configure opt-in biometric login.

SEE ALSO:

[Salesforce Help: User Opt-In Biometric Login \(Beta\) \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Enable User Opt-In Biometric Login \(Beta\) \(can be outdated or unavailable during release preview\)](#)

## Configure How Your Experience Cloud App Responds to Security Threats

With Enhanced Mobile App Security, you can customize how your Mobile Publisher for Experience Cloud app responds to security threats. Set your app to detect security threats, such as a jailbroken device or a man-in-the-middle attack. Then configure the severity level of how your app automatically responds when the threat is detected.

**Where:** This change applies to Mobile Publisher for Experience Cloud iOS app versions 12.3 or Android app versions 12.4 and later. Setup for Mobile Publisher is available in Lightning Experience in Enterprise, Performance, and Unlimited editions. Enhanced Mobile App Security is available for Mobile Publisher for Experience Cloud apps at no additional cost.

**How:** Enable Enhanced Mobile App Security in your app's Setup for Mobile Publisher project. Then configure the mobile security policies for your app in Mobile Security. To enable Enhanced Mobile App Security for an Android app, you must download an app signing key certificate from the Google Play Console.

SEE ALSO:

[Salesforce Help: Set Up Enhanced Mobile App Security for Mobile Publisher \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Enhanced Mobile App Security Policies for Mobile Publisher \(can be outdated or unavailable during release preview\)](#)

## Binary Upload Is the Default Distribution Method for New Mobile Publisher Apps

When you create a project in Setup for Mobile Publisher, you select an App Distribution Method. You choose whether you submit your app for Apple or Google review (Binary Upload), or if Salesforce submits your app for review (Fully Managed). Binary Upload is now the default App Distribution Method for new Mobile Publisher apps. The Fully Managed option is still available, and there's no change to existing apps.

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

 **Note:** There's no change to the Mobile Publisher App Distribution Types, which determine whether an app is publicly or privately distributed to end users.

SEE ALSO:

[Salesforce Help: App Distribution Methods \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Advantages of Binary Upload Distribution Method \(can be outdated or unavailable during release preview\)](#)

## Add Links to an Experience Cloud iOS App's Login Page

Mobile Publisher for Experience Cloud iOS apps now support links from the app's login page. Use your app's login screen to point your users to important pages, such as your app's privacy policy or terms and conditions. Mobile Publisher for Experience Cloud Android apps support links on the login page in app versions 11.3 and later.

**Where:** This change applies to Mobile Publisher for Experience Cloud iOS app versions 12.3 and later.

**How:** Use Experience Builder to add links to your site's login page.

SEE ALSO:

[Salesforce Help: Customize Sites with Experience Builder \(can be outdated or unavailable during release preview\)](#)

## Set the Default Method for How Your Experience Cloud App Opens External URLs (Generally Available)

The default experience is that your Experience Cloud site's URLs open in the in-app web view, while all URLs external to your site open in the in-app browser. You can now choose how your app opens all URLs external to your site, without having to configure each individual URL. You can configure all external URLs to open 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. Setting the default method for opening external URLs is now also supported for Messaging for In-App and Web in Service Cloud.

**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 \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: What's Messaging for In-App and Web? \(can be outdated or unavailable during release preview\)](#)

## Simplify Site Navigation on Mobile Publisher for LWR Sites (Beta)

Give your customers easier navigation by showing the hamburger menu and back button in Mobile Publisher for Experience Cloud apps on the LWR platform. To customize these navigation options for your LWR site, use the new `getNavigationConfig` wire adapter. The wire adapter exposes properties that enable or disable the hamburger menu and back button for Android and iOS apps.

**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](#).

**Why:** In Experience Builder, the settings in the Additional Navigation Options section are available only for Aura sites on the Customer Account Portal, Partner Central, Customer Service, and Help Center templates. The settings aren't supported in apps created with Mobile Publisher for the LWR platform. The wire adapter provides a way for you to show the hamburger menu and back button options on LWR sites.

SEE ALSO:

[Lightning Web Components Developer Guide: getNavigationConfig \(can be outdated or unavailable during release preview\)](#)

## Privacy Manifests Are Now Generated for Experience Cloud iOS Apps

Apple now requires privacy manifest files, which describe how your app and third-party SDKs collect and use app-user data. Mobile Publisher for Experience Cloud now generates this file on your behalf and uploads the file to your App Store account. There are no changes to the user experience of your app.

**Where:** This change applies to Mobile Publisher for Experience Cloud iOS app versions 12.2 and later.

SEE ALSO:

[Apple Developer Documentation: Privacy manifest files](#)

## General Mobile Updates

Enter the required Google Firebase information to support push notifications on Android mobile connected apps.

IN THIS SECTION:

[Update Your Android Mobile Connected App with Firebase Information Required for Push Notifications](#)

The legacy Firebase Cloud Messaging API server key is no longer accepted for configuring Android push notifications on mobile connected apps. Because of a change in how Google handles push notifications, 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 with Firebase Information Required for Push Notifications

The legacy Firebase Cloud Messaging API server key is no longer accepted for configuring Android push notifications on mobile connected apps. Because of a change in how Google handles push notifications, 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 Summer '24, OmniStudio (when the Managed Package Runtime setting is disabled) supports features from OmniStudio for Vlocity, including filling address fields in omniscritps with Google Map data, using Salesforce private connect for HTTP actions in integration procedures, and choosing whether to merge entries within a list in an integration procedure list action. Also, DataRaptor is now Omnistudio Data Mapper. For Winter '25 upgrades, disable New Order Save Behavior. To prepare for future releases, remove organization and profile standard objects from data mappers, remove OmniStudio components with unlocked packages, and check the impact of the date change in the ADDDAY function return.

IN THIS SECTION:

[Easily and Accurately Complete Address Fields](#)

Quickly fill out address fields in OmniScripts with Google Maps data. When a customer, agent, or other user starts typing an address, they can select an address from the matching addresses that the field shows, and the remaining address fields are automatically filled. To enable this setting, designers add a Type Ahead block to an OmniScript and configure the Google Maps autocomplete settings, including whether to show a Google map.

[Make Secure HTTP Outbound Calls to AWS VPC](#)

OmniStudio Standard now supports Salesforce Private Connect for HTTP Actions in Integration Procedures. Use Private Connect to make secure outbound HTTP calls from an OmniStudio org to an external service that runs on AWS Virtual Private Cloud (VPC). In the HTTP action of an Integration Procedure, specify a named credential with an outbound network connection to AWS with Private Connect.

[Remove Duplicates Within a List When Merging Lists](#)

To merge two lists in a List Action of an Integration Procedure, designers can now specify whether to merge entries within a list if it has duplicate entries. If an entry has a duplicate and is used as a Merge field, then the merged output is sometimes not as expected.

[OmniStudio DataRaptor Has a New Name](#)

We've renamed DataRaptor to Omnistudio Data Mapper. You'll see the updated name in the feature name and labels in the OmniStudio designers, documentation, and Trailhead modules. We've made these changes in a way so that your implementations continue to work. The new name appears in OmniStudio Spring '24 release and later.

### [Configure New Order Save Behavior During Upgrade](#)

Before you upgrade the OmniStudio package from Spring '24 or Summer '24 to Winter '25 or any patch release, disable New Order Save Behavior, complete the upgrade process, and then re-enable New Order Save Behavior to avoid upgrade failures.

### [Remove Organization and Profile Standard Objects from Data Mappers Used by Customer Portal Users](#)

Currently, our customers who are using the managed package runtime provides access to Organization and Profile Standard Objects for Customer Portal users through data mappers used in OmniScripts and FlexCards. Starting in Spring '25, Customer Portal users can't access these Standard Objects in data mappers. We recommend that our customers verify the current data mappers used in the OmniScripts and FlexCards that are used by Customer Portal users, and remove Organization and Profile Standard Objects from those data mappers.

### [Change in the ADDDAY Function Output](#)

The ADDDAY(date, days) function of the Set Value element currently adds the specified number of days to the specified date, and returns the sum of both the values without considering the user's time zone. In Spring '25, the ADDDAY function returns the date after considering the time zone, the same as in the package runtime output. Review your current setup to understand the impact of this change.

### [OmniStudio Minor Releases](#)

Find out about bug fixes, minor updates, and known issues about OmniStudio made after Summer '24 and before Winter '25.

## Easily and Accurately Complete Address Fields

Quickly fill out address fields in OmniScripts with Google Maps data. When a customer, agent, or other user starts typing an address, they can select an address from the matching addresses that the field shows, and the remaining address fields are automatically filled. To enable this setting, designers add a Type Ahead block to an OmniScript and configure the Google Maps autocomplete settings, including whether to show a Google map.

**Where:** This feature is available in Lightning Experience and Experience Cloud sites in Enterprise, Performance, and Unlimited editions where OmniStudio is enabled.

**Who:** This feature is available to OmniStudio customers who use the managed package or standard runtime.

**How:** The Google Maps settings are available by default. Designers require a Google API key. After they enable the Google Maps autocomplete, they enter the key, configure the properties, and preview the autocomplete field.

SEE ALSO:

[Salesforce Help: Use Google Maps Autocomplete in OmniScripts \(can be outdated or unavailable during release preview\)](#)

## Make Secure HTTP Outbound Calls to AWS VPC

OmniStudio Standard now supports Salesforce Private Connect for HTTP Actions in Integration Procedures. Use Private Connect to make secure outbound HTTP calls from an OmniStudio org to an external service that runs on AWS Virtual Private Cloud (VPC). In the HTTP action of an Integration Procedure, specify a named credential with an outbound network connection to AWS with Private Connect.

**Where:** This feature is available in Lightning Experience and Experience Cloud sites in Enterprise, Performance, and Unlimited editions where OmniStudio is enabled.

**Who:** This feature is available to OmniStudio customers who use the managed package or standard runtime.

**Why:** Salesforce Private Connect provides a fully managed secure connection between Salesforce first-party data centers and Amazon Web Services. Directly connect your Salesforce org to your Virtual Private Clouds (VPCs) that run on AWS by using Amazon's PrivateLink. All traffic is routed over a dedicated connection (fully managed by Salesforce) without exposing your VPCs to the public internet.

SEE ALSO:

[Salesforce Help: HTTP Action Properties for Integration Procedures \(can be outdated or unavailable during release preview\)](#)

## Remove Duplicates Within a List When Merging Lists

To merge two lists in a List Action of an Integration Procedure, designers can now specify whether to merge entries within a list if it has duplicate entries. If an entry has a duplicate and is used as a Merge field, then the merged output is sometimes not as expected.

**Where:** This feature is available in Lightning Experience and Experience Cloud sites in Enterprise, Performance, and Unlimited editions where OmniStudio is enabled.

**Who:** This feature is available to OmniStudio customers who use the standard runtime or managed package.

**How:** To disable merging entries within a list if it has duplicate entries, in the Design view of a List Action property, select **Prevent Intra List Merge**.

SEE ALSO:

[Salesforce Help: List Action Properties for Integration Procedures \(can be outdated or unavailable during release preview\)](#)

## OmniStudio DataRaptor Has a New Name

We've renamed DataRaptor to Omnistudio Data Mapper. You'll see the updated name in the feature name and labels in the OmniStudio designers, documentation, and Trailhead modules. We've made these changes in a way so that your implementations continue to work. The new name appears in OmniStudio Spring '24 release and later.

**Where:** This change applies to all editions with OmniStudio licenses.

## Configure New Order Save Behavior During Upgrade

Before you upgrade the OmniStudio package from Spring '24 or Summer '24 to Winter '25 or any patch release, disable New Order Save Behavior, complete the upgrade process, and then re-enable New Order Save Behavior to avoid upgrade failures.

**Where:** This change applies to Lightning Experience and Experience Cloud sites in Enterprise, Performance, and Unlimited editions where OmniStudio is enabled.

**When:** Starting in Winter '25, New Order Save Behavior is enabled by default in OmniStudio.

**Who:** This change impacts OmniStudio customers who use the managed package and standard runtime.

**How:** From Setup, in the Quick Find box, enter *Release Updates*, and then click **Release Updates**. On the Needs Action page, go to Enable New Order Save Behavior, and then click **Get Started**. If the guided flow shows the Disable Test Run button, click it to disable New Order Save Behavior. If you see the Enable Test Run button, New Order Save Behavior is already disabled, and you can proceed with the package installation. After the package installation is complete, enable New Order Save Behavior.

## Remove Organization and Profile Standard Objects from Data Mappers Used by Customer Portal Users

Currently, our customers who are using the managed package runtime provides access to Organization and Profile Standard Objects for Customer Portal users through data mappers used in OmniScripts and FlexCards. Starting in Spring '25, Customer Portal users can't access these Standard Objects in data mappers. We recommend that our customers verify the current data mappers used in the OmniScripts and FlexCards that are used by Customer Portal users, and remove Organization and Profile Standard Objects from those data mappers.

**Where:** This change applies to Experience Cloud sites in Enterprise, Performance, and Unlimited editions where OmniStudio is enabled.

**Who:** This change impacts OmniStudio customers who use the managed package runtime.

## Change in the ADDDAY Function Output

The ADDDAY(date, days) function of the Set Value element currently adds the specified number of days to the specified date, and returns the sum of both the values without considering the user's time zone. In Spring '25, the ADDDAY function returns the date after considering the time zone, the same as in the package runtime output. Review your current setup to understand the impact of this change.

**Where:** This change applies to Lightning Experience and Experience Cloud sites in Enterprise, Performance, and Unlimited editions where OmniStudio is enabled.

**Who:** This change impacts OmniStudio customers who use the standard runtime and have disabled the Managed Package Runtime setting.

**Why:** In this example, the ADDDAY function is defined with the user's time zone in Pacific Time (PT):

```
ADDDAY ("2023-10-04T04:04:00.000Z", 21)
```

The input for the ADDDAY function is "2023-10-04T04:04:00.000Z", which represents October 04, 2023 at 04:04 AM in the UTC format.

This output shows the current ADDDAY function output in the standard runtime:

```
{
 "addDay": "2023-10-25T04:04:00.000Z"
}
```

In this output, the resulting date, 25, is the sum of the specified date (04) and the number of days (21). It currently doesn't account for the user's time zone and displays it along with the output.

In Spring '25, the input in the ADDDAY function is first converted to the user's time zone. In this example, the input date in the user's time zone is 2023-10-04 21:04:00.000 PT. The output of the ADDDAY function after adding 21 days to the input date is "2023-10-24". Note that the output is in the Date format, and not Date Time format.

```
{"addDay": "2023-10-24"}
```

SEE ALSO:

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

## OmniStudio Minor Releases

Find out about bug fixes, minor updates, and known issues about OmniStudio made after Summer '24 and before Winter '25.

[OmniStudio Minor Releases](#)

# Revenue

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Automate and scale your revenue operations with a robust portfolio of Revenue Cloud products. Use Revenue Lifecycle Management to empower your organization's sales and revenue management processes. Salesforce Billing offers efficient resolutions to all invoice processing issues.

## IN THIS SECTION:

### [Revenue Lifecycle Management](#)

Realize faster time to revenue with Revenue Lifecycle Management's robust product catalog, pricing, configurator, quoting, and asset management features. Support your unique business practices by customizing Revenue Lifecycle Management's extensible objects and APIs.

### [Salesforce Billing](#)

Salesforce Billing provides usability improvements that make it easier to identify and fix batch invoice run errors.

### [Salesforce Subscription Management](#)

Learn more about the new metadata type in Salesforce Subscription Management.

## Revenue Lifecycle Management

Realize faster time to revenue with Revenue Lifecycle Management's robust product catalog, pricing, configurator, quoting, and asset management features. Support your unique business practices by customizing Revenue Lifecycle Management's extensible objects and APIs.

## IN THIS SECTION:

### [Revenue Lifecycle Management Videos](#)

New videos help you learn about the capabilities of Revenue Lifecycle Management.

### [Product Catalog Management](#)

Swiftly add multiple products based on a product classification to a product bundle and reduce time to market. Use Product Catalog Management APIs to translate select fields on the Product and Product category objects, and make the objects accessible to a global audience. Represent monetary and percentage-based product characteristics by using the currency and percent attribute data types. Define custom fields on select Product Catalog Management objects, and extend the objects to meet your business needs. Select the slider display type for product attributes of the number, percent, and currency data type, and adjust attribute values with slider controls in run time. Quickly set up Product Discovery and provide an enhanced product browsing experience to your partners and customers.

### [Salesforce Pricing](#)

Calculate accurate prices for all your line items by deriving a product's price from other source products or assets or by generating contract-based prices. Set profile-level security for each element within a pricing procedure. Use the Operations Console as a one-stop shop to see all your pricing data. Dynamically map output variables in a lookup table and change context tag values for variables by using the new Assignment element. Document all costs associated with the creation of a product.

### [Product Configurator](#)

Easily manage product compatibility and validation with actionable configuration rules. Build flexible bundles by searching and adding qualified products in real-time. Configure products with the currency and percentage attributes that reflect real-world values such as discounts and fees.

### [Quote and Order Capture](#)

Enhance the selling experience with Transaction Line Editor enhancements. Use custom fields to extend Revenue Lifecycle Management. Display unique prices depending on the type of transaction. Generate professional quote documents with Document Builder in Revenue Lifecycle Management. Estimate the tax on your orders. Submit orders to Dynamic Revenue Orchestrator for fulfillment or automatically submit eligible orders for fulfillment.

### [Asset Lifecycle](#)

Provide sales reps with insights into customer assets and help your company increase customer lifetime value by using Revenue Lifecycle Management.

### [Dynamic Revenue Orchestrator \(Generally Available\)](#)

Dynamic Revenue Orchestrator, or DRO, is a flexible order fulfillment product that is natively built on the Salesforce platform and embedded into end-to-end sales processes. DRO provides a complete view of the entire fulfillment design and runtime, including order decomposition and fulfillment plans, plus jeopardy management, and a graphic UI for enriching products with data.

## Revenue Lifecycle Management Videos

New videos help you learn about the capabilities of Revenue Lifecycle Management.

-  [Introduction to Revenue Lifecycle Management](#) gives an overview of the Revenue Lifecycle Management solutions.

## Product Catalog Management

Swiftly add multiple products based on a product classification to a product bundle and reduce time to market. Use Product Catalog Management APIs to translate select fields on the Product and Product category objects, and make the objects accessible to a global audience. Represent monetary and percentage-based product characteristics by using the currency and percent attribute data types. Define custom fields on select Product Catalog Management objects, and extend the objects to meet your business needs. Select the slider display type for product attributes of the number, percent, and currency data type, and adjust attribute values with slider controls in run time. Quickly set up Product Discovery and provide an enhanced product browsing experience to your partners and customers.

### IN THIS SECTION:

#### [Use Dynamic Options to Add All Products Based On a Product Classification to a Product Bundle](#)

Your product designers can now dynamically add all optional products with similar characteristics to a configurable product bundle, even as the product components in the bundle grow and evolve over time. Product designers can simply add a product classification component to the configurable product bundle. All the products that are based on the product classification are dynamically available for selection to your buyers and sellers at run time.

#### [Maximize Product Reach with Translated Product and Product Category Data](#)

In a global business with users from diverse linguistic backgrounds, use Product Catalog Management APIs to provide translated data for fields in Product2 and ProductCategory objects. Translated data ensures that non-English users can access and effectively use products and product categories.

#### [Accurately Represent Monetary Values and Percentages in Product Attributes](#)

Use the currency and percent attribute data types to describe product characteristics that represent currency and percentage values. Previously, you used only the number data type. Use the currency data type for product attributes used in financial calculations and reporting. Use the percentage data type for product attributes that represent discounts, commissions, and other percentage-based metrics.

### [Alter Product Attribute Values Through Slider Controls](#)

Show attributes of the currency, number, and percent data types as sliders at run time. Instead of typing in a number, or using increment buttons, drag the slider on a predefined scale to adjust the attribute values. Sliders are intuitive and provide immediate visual feedback as your users make attribute adjustments.

### [Personalize Product Catalog Management Objects with Custom Fields](#)

You can now add custom fields to multiple Product Catalog Management objects and pass the custom fields as additional fields in the Product List API and Bulk Product Details API. These APIs return values of all the custom fields to the requesting run time systems.

### [Other Changes in Product Catalog Management](#)

To include or exclude picklist values from product classification attributes, product attribute definitions, or overridden product attributes, you can now use the Include or Exclude Picklist Values action next to the attributes. Previously, you used the Excluded Picklist Values field when you edited the product classification attribute, product attribute definition, or overridden product attribute. The Excluded Picklist Values field is no longer available. Additionally, to validate the component count, and to ensure that every product attribute in a static and simple bundle has a default value, and that the group cardinality is in compliance, you can now use Validate Product Definition. Previously, this functionality was called Validate Product Bundle. Finally, when a group has multiple products, click Show More to see 10 products at a time. Previously, Show More expanded to show five products.

### [Product Discovery](#)

Set up product discovery faster by using the new predefined pricing and qualification procedure templates. Provide an enhanced product browsing experience to your customers and partners by using Product Discovery components on Experience Cloud sites. Customize the product browsing experience for your sales reps, customers, and partners to provide the information and options that they need. Explore the support for derived pricing, and an enhancement to easily add multiple products.

### [New and Changed Objects in Product Catalog Management](#)

Do more with the new and changed objects in Product Catalog Management.

### [Connect REST APIs](#)

Learn more about the updates to the Connect REST APIs in Product Catalog Management.

## Use Dynamic Options to Add All Products Based On a Product Classification to a Product Bundle

Your product designers can now dynamically add all optional products with similar characteristics to a configurable product bundle, even as the product components in the bundle grow and evolve over time. Product designers can simply add a product classification component to the configurable product bundle. All the products that are based on the product classification are dynamically available for selection to your buyers and sellers at run time.

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

SEE ALSO:

[Salesforce Help: Add Components to a Configurable Product Bundle \(can be outdated or unavailable during release preview\)](#)

## Maximize Product Reach with Translated Product and Product Category Data

In a global business with users from diverse linguistic backgrounds, use Product Catalog Management APIs to provide translated data for fields in Product2 and ProductCategory objects. Translated data ensures that non-English users can access and effectively use products and product categories.

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

**Why:** Data translation is available for the name, description, and help text fields on the Product2 object via the Product List API, Product Details API, and Bulk Product Details API. Data translation is available for the name and description fields on the Product Category object via the Category List API and Category Details API.

SEE ALSO:

[Salesforce Help: Set Up Data Translation In Product Catalog Management \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Translate Product2 and ProductCategory Data Management \(can be outdated or unavailable during release preview\)](#)

## Accurately Represent Monetary Values and Percentages in Product Attributes

Use the currency and percent attribute data types to describe product characteristics that represent currency and percentage values. Previously, you used only the number data type. Use the currency data type for product attributes used in financial calculations and reporting. Use the percentage data type for product attributes that represent discounts, commissions, and other percentage-based metrics.

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

SEE ALSO:

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

## Alter Product Attribute Values Through Slider Controls

Show attributes of the currency, number, and percent data types as sliders at run time. Instead of typing in a number, or using increment buttons, drag the slider on a predefined scale to adjust the attribute values. Sliders are intuitive and provide immediate visual feedback as your users make attribute adjustments.

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

SEE ALSO:

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

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

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

## Personalize Product Catalog Management Objects with Custom Fields

You can now add custom fields to multiple Product Catalog Management objects and pass the custom fields as additional fields in the Product List API and Bulk Product Details API. These APIs return values of all the custom fields to the requesting run time systems.

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

**Why:** You can add custom fields to these objects:

- AttributeCategory
- AttributeCategoryAttribute
- AttributePicklist
- AttributePicklistValue
- AttrPicklistExcludedValue
- ProductClassification
- ProductClassificationAttr



- ProductAttributeDefinition
- ProductRelatedComponent
- ProductRelComponentOverride
- ProductComponentGroup
- ProductComponentGrpOverride
- ProductRelationshipType

## Other Changes in Product Catalog Management

To include or exclude picklist values from product classification attributes, product attribute definitions, or overridden product attributes, you can now use the Include or Exclude Picklist Values action next to the attributes. Previously, you used the Excluded Picklist Values field when you edited the product classification attribute, product attribute definition, or overridden product attribute. The Excluded Picklist Values field is no longer available. Additionally, to validate the component count, and to ensure that every product attribute in a static and simple bundle has a default value, and that the group cardinality is in compliance, you can now use Validate Product Definition. Previously, this functionality was called Validate Product Bundle. Finally, when a group has multiple products, click Show More to see 10 products at a time. Previously, Show More expanded to show five products.

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

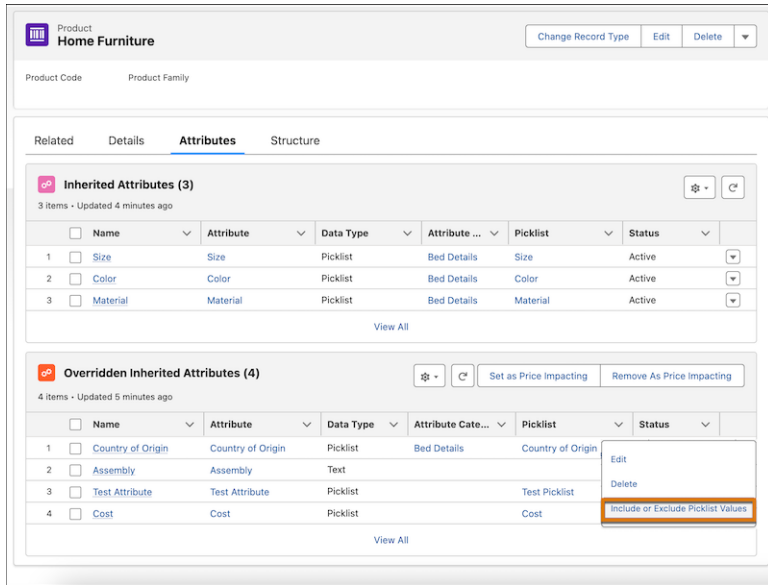
### How:

To include or exclude picklist values from product classification attributes of the picklist data type, click **Include or Exclude Picklist Values**.

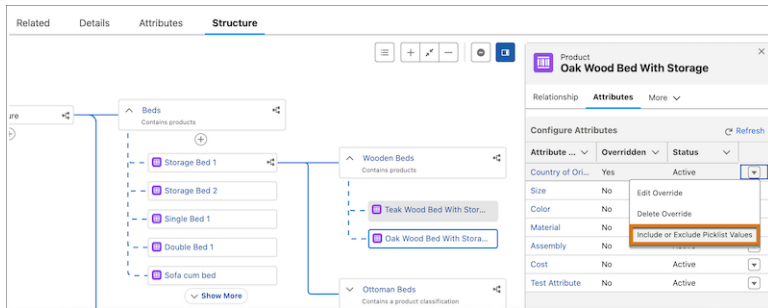
The screenshot shows the 'Product Classification' record for 'Beds'. The 'Attributes' tab is active, displaying a table of 7 attributes. The 'Country of Origin' attribute is selected, and a context menu is open over it, highlighting the 'Include or Exclude Picklist Values' option.

| Name                                       | Attribute         | Data Type | Default Value | Attribute Cate... | Status |
|--------------------------------------------|-------------------|-----------|---------------|-------------------|--------|
| <input type="checkbox"/> Country of Origin | Country of Origin | Picklist  | Indonesia     | Bed Details       | Active |
| <input type="checkbox"/> Size              | Size              | Picklist  |               | Bed Details       |        |
| <input type="checkbox"/> Color             | Color             | Picklist  |               | Bed Details       |        |
| <input type="checkbox"/> Material          | Material          | Picklist  |               | Bed Details       |        |
| <input type="checkbox"/> Assembly          | Assembly          | Text      |               |                   |        |

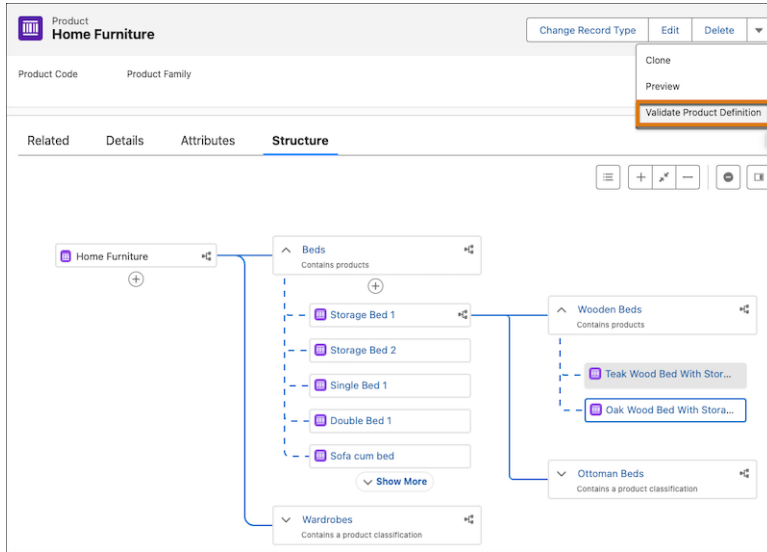
To include or exclude picklist values from product attribute definitions of the picklist data type, click **Include or Exclude Picklist Values** next to the overridden inherited attribute.



To include or exclude picklist values from overridden product attributes of the picklist data type, click **Include or Exclude Picklist Values** next to the overridden product attribute.



To validate the product definition, click **Validate Product Definition**.



#### SEE ALSO:

[Salesforce Help: Include or Exclude Picklist Values in a Product Classification Attribute \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Include or Exclude Picklist Values in a Product Attribute \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Include or Exclude Picklist Values in Overridden Product Attributes \(can be outdated or unavailable during release preview\)](#)

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

## Product Discovery

Set up product discovery faster by using the new predefined pricing and qualification procedure templates. Provide an enhanced product browsing experience to your customers and partners by using Product Discovery components on Experience Cloud sites. Customize the product browsing experience for your sales reps, customers, and partners to provide the information and options that they need. Explore the support for derived pricing, and an enhancement to easily add multiple products.

#### IN THIS SECTION:

##### [Quickly Create Pricing Procedures and Qualification Procedures](#)

Clone the new predefined Product Discovery Pricing Procedure and Product Discovery Qualification Procedure templates from the Expression Set Templates page, and then customize them according to your business requirements.

##### [Supercharge Product Browsing Experience for Your Partners and Customers](#)

You can now add the Product List, Product Details, Product Attribute Details, and Product Bundle Details components to Experience Cloud site pages. Partners and customers can use the Product List Page component to browse catalogs, categories, and products in a simple, structured way to identify the most suitable products. They can use the Product Details, Product Attribute Details, and Product Bundle Details components to get a single, comprehensive view of product information to make quick, informed decisions.

##### [Fine-Tune Product Browsing Experience](#)

Provide only the required options and information to your sales reps when they browse products. Use the Product List Page component settings to show additional fields and to show or hide the options to configure products, enter quantity, and select multiple products. To improve performance and usability, you can change the number of additional products that are loaded when a user reaches the end of the displayed list of products.

### [Use Pricing and Qualification Procedures Only When Relevant](#)

Enable or disable the usage of pricing and qualification procedures for Product Discovery. After you enable these procedures for Product Discovery, you can also enable or disable them for different components. With Summer '24, these procedures are disabled for all orgs by default. If you want to continue to use these procedures, enable the settings.

### [Easily Add Products to Quotes and Orders](#)

Sales reps can directly select products from catalog pages, and then create quotes or orders with the selected products. To enable this option, select the Product List Page component in Lightning App Builder or Experience Builder. Then, in the Add Products To field, select Quote or Order.

### [Browse and Add Products with Derived Pricing](#)

Sales reps can now browse and add products that are priced based on another pricing source, such as a product or an asset. For products that use derived pricing, the price is calculated and displayed only after users add them to quotes or orders.

### [Select and Add Products Faster](#)

With a single click, sales reps, partners, and customers can select all the qualified products from the displayed list of products by using the All Products checkbox.

### [Connect REST APIs](#)

Learn more about the updates to the Connect REST APIs in Product Discovery.

## Quickly Create Pricing Procedures and Qualification Procedures

Clone the new predefined Product Discovery Pricing Procedure and Product Discovery Qualification Procedure templates from the Expression Set Templates page, and then customize them according to your business requirements.

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

## Supercharge Product Browsing Experience for Your Partners and Customers

You can now add the Product List, Product Details, Product Attribute Details, and Product Bundle Details components to Experience Cloud site pages. Partners and customers can use the Product List Page component to browse catalogs, categories, and products in a simple, structured way to identify the most suitable products. They can use the Product Details, Product Attribute Details, and Product Bundle Details components to get a single, comprehensive view of product information to make quick, informed decisions.

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

**How:** Open an Experience Cloud site page in Experience Builder, click **Components**, and then drag components to the canvas. If needed, select a component and change its properties.

## Fine-Tune Product Browsing Experience

Provide only the required options and information to your sales reps when they browse products. Use the Product List Page component settings to show additional fields and to show or hide the options to configure products, enter quantity, and select multiple products. To improve performance and usability, you can change the number of additional products that are loaded when a user reaches the end of the displayed list of products.

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

**How:** Select the Product List Page component in Lightning App Builder or Experience Builder, and then specify the properties.

## Use Pricing and Qualification Procedures Only When Relevant

Enable or disable the usage of pricing and qualification procedures for Product Discovery. After you enable these procedures for Product Discovery, you can also enable or disable them for different components. With Summer '24, these procedures are disabled for all orgs by default. If you want to continue to use these procedures, enable the settings.

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

**How:** Enable or disable pricing and qualification procedures for Product Discovery from the Product Discovery Settings page. After you enable the procedures for Product Discovery, select the Product List Page component in Lightning App Builder or Experience Builder, and then select or deselect the **Run pricing procedure** and **Run qualification procedure** checkboxes.

## Easily Add Products to Quotes and Orders

Sales reps can directly select products from catalog pages, and then create quotes or orders with the selected products. To enable this option, select the Product List Page component in Lightning App Builder or Experience Builder. Then, in the Add Products To field, select Quote or Order.

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

## Browse and Add Products with Derived Pricing

Sales reps can now browse and add products that are priced based on another pricing source, such as a product or an asset. For products that use derived pricing, the price is calculated and displayed only after users add them to quotes or orders.

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

**How:** Create a pricing procedure by using the updated ProductDiscoveryContext context definition template, the new predefined Pricing Procedure template, and a decision table that contains the IsDerived field.

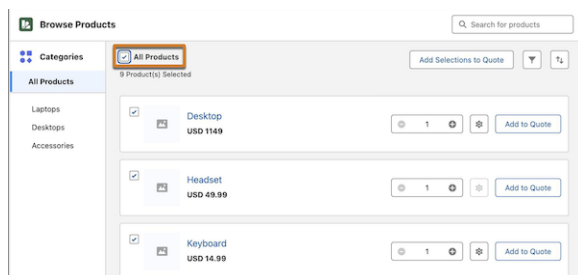
If you created a pricing procedure before Summer '24 and want to use derived pricing, first sync the context definition that you created. Then, edit your pricing procedure with a decision table that contains the IsDerived field.

## Select and Add Products Faster

With a single click, sales reps, partners, and customers can select all the qualified products from the displayed list of products by using the All Products checkbox.

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

**How:** Open a product list, and then click **Add Products**.



## Connect REST APIs

Learn more about the updates to the Connect REST APIs in Product Discovery.

**IN THIS SECTION:**[New Connect REST API Resources](#)

Learn more about the resources available with Product Discovery.

[Changed Connect REST API Request Bodies](#)

These request bodies have changes.

[Changed Connect REST API Response Bodies](#)

These response bodies have changes.

**New Connect REST API Resources**

Learn more about the resources available with Product Discovery.

**Product Discovery****Retrieve details for multiple products**

Make a POST request to the `/connect/cpq/products/bulk` resource.

New request body: Bulk Product Details Input

New response body: CPQ Base Bulk Details

**Changed Connect REST API Request Bodies**

These request bodies have changes.

**Products Details (POST)****Product Details Input**

This request body has this new property.

- `additionalFields`—Additional standard or custom fields to include in the response.

**Global Search (POST)****Products Search Input**

This request body has these new properties.

- `additionalFields`—Additional standard or custom fields of the Product2 object to include in the response.
- `includeCatalogDetails`—Indicates whether to include catalog details in the response.

**Products List (POST)****Product List Input**

This request body has these new properties.

- `additionalFields`—Additional standard or custom fields of the Product2 object to include in the response.
- `includeCatalogDetails`—Indicates whether to include catalog details in the response.

**Changed Connect REST API Response Bodies**

These response bodies have changes.

**Products Details (POST)****CPQ Base Details**

This response body has this new property.

- `additionalFields`—Key-value pair of additional standard or custom fields with their values.

**Global Search (POST) and Products List (POST)****CPQ Base List**

This response body has this new property.

- `additionalFields`—Key-value pair of additional standard or custom fields of the Product2 object with their values.

**New and Changed Objects in Product Catalog Management**

Do more with the new and changed objects in Product Catalog Management.

**Who:** Users upgrading from Spring '24 must set field level security to access the new fields on the Product2 object.

**Exclude attribute picklist values from product classification attributes and product attributes**

Use the new `AttrPicklistExcludedValue` object.

**Get translated values for the product specification type's label and description**

Use the new `ProductSpecificationTypeLocalization` object.

**Define the quantity of a fulfillment order line item**

Use the new `FulfillmentQtyCalcMethods` field on the existing Product2 object.

**Define the number of fulfillment order line items that must be generated**

Use the new `DecompositionScope` field on the existing Product2 object.

**Adjust the attribute value in increments or decrements of the step value at run time**

Use the new `StepValue` field on the existing ProductAttributeDefinition and ProductClassificationAttr objects.

**Display attributes of number, currency, and percent data types as sliders at run time**

Use the new supported value `Slider` in the existing `Display Type` field on the ProductAttributeDefinition and ProductClassificationAttr object.

**Represent monetary and percentage-based attributes**

Use the new supported values `Currency` and `Percent` in the `DataType` field on the AttributeDefinition object.

**Connect REST APIs**

Learn more about the updates to the Connect REST APIs in Product Catalog Management.

**IN THIS SECTION:**

[New Connect REST API Resources](#)

Learn more about the resources available with Product Catalog Management.

[Changed Connect REST API Request Bodies](#)

This request body has changes.

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

These response bodies have changes.

SEE ALSO:

[Revenue Lifecycle Management Developer Guide: Product Catalog Management Business APIs](#)

## New Connect REST API Resources

Learn more about the resources available with Product Catalog Management.

Product Catalog Management

### Retrieve details for multiple products

Make a POST request to the `/connect/pcm/products/bulk` resource.

New request body: Products Detail Bulk Input

New response body: Products Output

## Changed Connect REST API Request Bodies

This request body has changes.

Products List (POST)

### Product Input

This request body has this new property.

- `additionalFields`—Map of the object and the list of additional standard or custom fields to be queried along with the standard response.

## Changed Connect REST API Response Bodies

These response bodies have changes.

Products List (POST) and Product By ID (GET)

### Product

This response body has these new properties.

- `additionalFields`—Key-value pair of additional standard or custom fields with their values.
- `catalogs`—List of the associated catalogs.

Bulk Products Details (POST) and Product By ID (GET)

### Product Classification

This response body has these new properties.

- `code`—Code of the product classification record.
- `name`—Name of the product classification record.
- `status`—Status of the product classification record.



## Salesforce Pricing

Calculate accurate prices for all your line items by deriving a product's price from other source products or assets or by generating contract-based prices. Set profile-level security for each element within a pricing procedure. Use the Operations Console as a one-stop shop to see all your pricing data. Dynamically map output variables in a lookup table and change context tag values for variables by using the new Assignment element. Document all costs associated with the creation of a product.

### IN THIS SECTION:

#### [Accurately Derive Prices from Products and Assets Using Salesforce Pricing](#)

Create derived price records to determine a product's price by using another pricing source, such as a product or an asset. Incorporate a wide range of pricing factors and enhance pricing accuracy and accurate pricing for your derived products.

#### [Automatically Populate Output Variables for Pricing Elements](#)

Set default mappings for specific output columns of lookup tables associated with the List Price and Price Adjustment Matrix elements to reduce manual user entry. You can set default mapping only for the unit price, adjustment type, and adjustment value variables.

#### [Easily Update Context Tags](#)

Use the Assignment element in a pricing procedure to set and change the context tag values of variables. Give your users the flexibility to customise a variable's value within a pricing procedure and enable their business to optimise their pricing strategies for maximum effectiveness.

#### [Enhance Pricing Data Security](#)

Set profile-level access to grant access to all pricing elements in a pricing procedure. Based on the security level you set, only the users who have access can see pricing information, and the decisions made and displayed in the Waterfall view after a pricing procedure runs.

#### [Tailor Pricing Discounts for Your Business Using Contract-Based Pricing](#)

Implement contract-based pricing to set discounts to specific business conditions using the predefined Contract Pricing Entries lookup table. Establish pricing rules linked to contracts, using List Price, Volume Discounts, Tier Discounts, Attribute-Based Price, Bundle-Based Price, and Price Adjustment Matrix elements. These contracted prices can override existing methods, including base price calculations and various discount types. Turn on the contract-based pricing option in a pricing element and provide a value for the Contract Pricing output variable.

#### [Track Pricing Data Using Event Log Files](#)

To get a complete overview of your pricing procedures being executed, use the new Pricing events. Use the Pricing event log file type to measure how long it takes to run the pricing APIs. Use the event log files to track metrics related to pricing status, the error codes generated, and the pricing procedure configured and used.

#### [Monitor Your Pricing Data From the Operations Console](#)

Get a complete overview of the pricing data from the Operations Console. At a glance, you see the data consumed when pricing operations are performed and the event log files generated during the execution of pricing processes.

#### [Comprehensively Track Product Cost by Using Cost Books](#)

Create and organize multiple cost books to define expenses that occur when you create a product. Set a default cost book and create individual cost book entries to track all the cost factors associated with product creation.

#### [Search for Any Price Book with the Redesigned Price Book Component](#)

The modification of Lightning components, Salesforce Lightning Design System (SLDS) styles, and custom properties help your users use the new record pickers to search for any price book. They are no longer required to depend on the limited options in a dropdown. Previously, the Choose Price Book component was on a type picklist and couldn't show more than 2000 records.

#### [New Objects in Salesforce Pricing](#)

Do more with these new Salesforce Pricing objects.

[Connect REST APIs](#)

Learn more about the updates to the Connect REST APIs in Salesforce Pricing.

[New Metadata Type](#)

Learn more about the new metadata type in Salesforce Pricing.

## Accurately Derive Prices from Products and Assets Using Salesforce Pricing

Create derived price records to determine a product's price by using another pricing source, such as a product or an asset. Incorporate a wide range of pricing factors and enhance pricing accuracy and accurate pricing for your derived products.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Revenue Lifecycle Management is enabled.

### IN THIS SECTION:

[Ensure Precise Pricing for a Derived Product](#)

Define pricing rules by creating derived price records for products assigned as derived products in your organization's price book. Derived pricing rules ensure precise pricing for derived products by leveraging other internal products and assets.

[Accurately Calculate Derived Prices with Pricing Contributors](#)

Use discovery elements to retrieve contributing pricing factors from appropriate lookup tables to accurately access pricing data and calculate a product's derived price. This pricing data is written into a context definition by using custom context nodes. Create a discovery procedure and set the usage type as Pricing Discovery to locate the pricing data stored in the context definition.

[Dynamically Calculate Product Prices Using the Derived Price Element](#)

Convert your previously defined pricing policies into pricing procedures that calculate a product's derived price. Add the Derived Price element to a pricing procedure and use the pricing data fetched from the discovery procedure to calculate the product's derived price.

## Ensure Precise Pricing for a Derived Product

Define pricing rules by creating derived price records for products assigned as derived products in your organization's price book. Derived pricing rules ensure precise pricing for derived products by leveraging other internal products and assets.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Revenue Lifecycle Management is enabled.

**How:** Create a price book entry for a product and select **Is Derived**. Ensure that the list price of the derived product is 0.

Then, from the App Launcher, find **Derived Prices** and create a derived price record.

## Accurately Calculate Derived Prices with Pricing Contributors

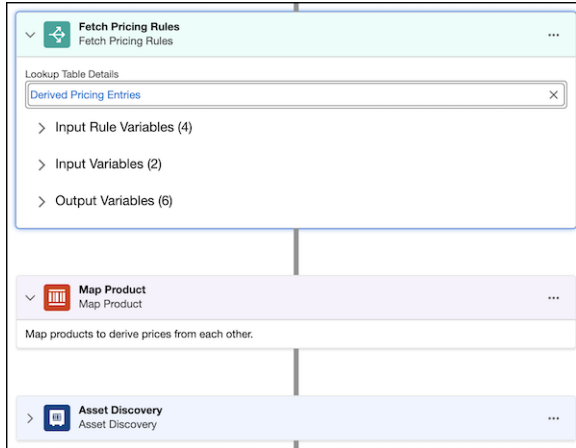
Use discovery elements to retrieve contributing pricing factors from appropriate lookup tables to accurately access pricing data and calculate a product's derived price. This pricing data is written into a context definition by using custom context nodes. Create a discovery procedure and set the usage type as Pricing Discovery to locate the pricing data stored in the context definition.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Revenue Lifecycle Management is enabled.

**How:** From the App Launcher, search for and create a discovery procedure with **Pricing Discovery** as the usage type.

The discovery procedure uses three pricing elements to help locate pricing data to calculate the derived price.

- Fetch Pricing Rules: Locate products that apply pricing rules to your derived price element.
- Map Products: Map the products used to derive prices from each other.
- Asset Discovery: Locate assets that apply pricing rules to your derived price element.

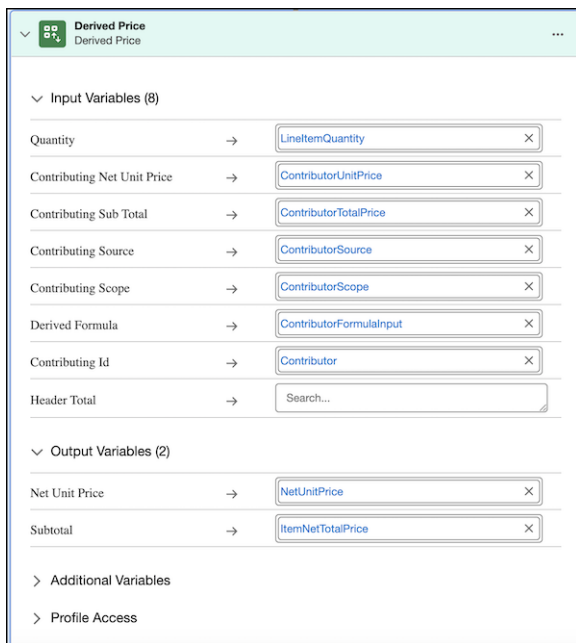


## Dynamically Calculate Product Prices Using the Derived Price Element

Convert your previously defined pricing policies into pricing procedures that calculate a product's derived price. Add the Derived Price element to a pricing procedure and use the pricing data fetched from the discovery procedure to calculate the product's derived price.

**Where:** This change applies to Lightning Experience in Developer, Enterprise, and Unlimited editions where Revenue Lifecycle Management is enabled.

**How:** In the Pricing Procedure Builder, add the Derived Price element.

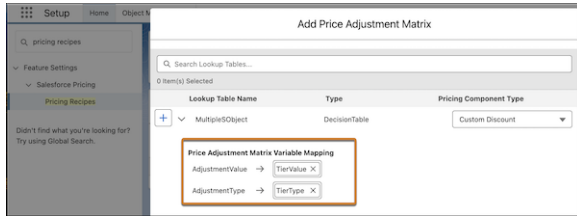


## Automatically Populate Output Variables for Pricing Elements

Set default mappings for specific output columns of lookup tables associated with the List Price and Price Adjustment Matrix elements to reduce manual user entry. You can set default mapping only for the unit price, adjustment type, and adjustment value variables.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Revenue Lifecycle Management is enabled.

**How:** From Setup, search and select **Pricing Recipes**. Then, select a pricing recipe and go to the Price Adjustment Matrix tab. Choose either the List Price or Custom Discount pricing component type, and set default mappings.



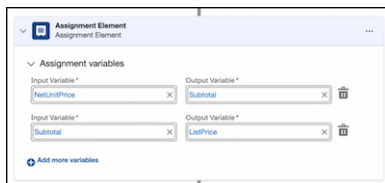
SEE ALSO:

[Salesforce Help: Modify Price Adjustment Matrices \(can be outdated or unavailable during release preview\)](#)

## Easily Update Context Tags

Use the Assignment element in a pricing procedure to set and change the context tag values of variables. Give your users the flexibility to customise a variable's value within a pricing procedure and enable their business to optimise their pricing strategies for maximum effectiveness.

**Where:** This change applies to Lightning Experience in Developer, Enterprise, and Unlimited editions where Revenue Lifecycle Management is enabled.



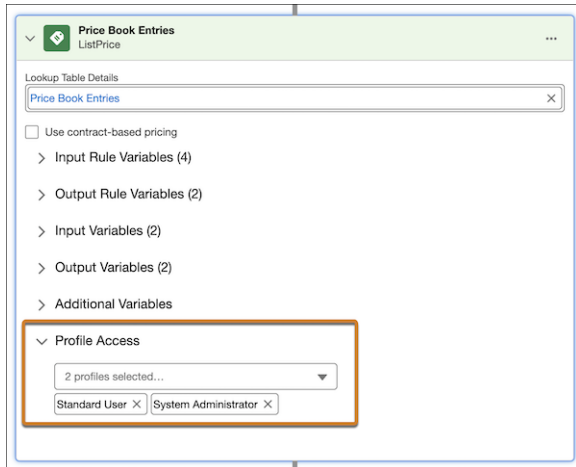
SEE ALSO:

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

## Enhance Pricing Data Security

Set profile-level access to grant access to all pricing elements in a pricing procedure. Based on the security level you set, only the users who have access can see pricing information, and the decisions made and displayed in the Waterfall view after a pricing procedure runs.

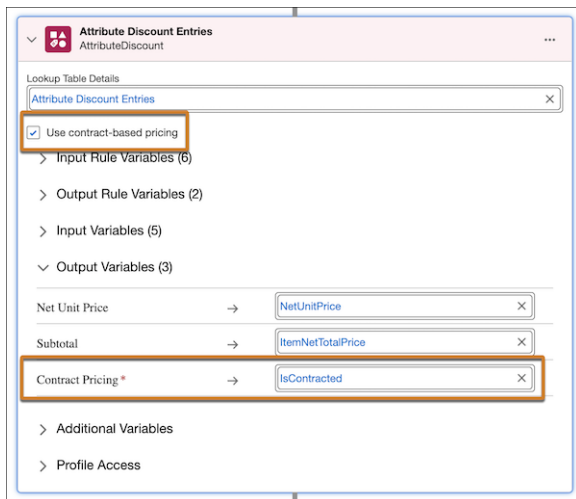
**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Revenue Lifecycle Management is enabled.



## Tailor Pricing Discounts for Your Business Using Contract-Based Pricing

Implement contract-based pricing to set discounts to specific business conditions using the predefined Contract Pricing Entries lookup table. Establish pricing rules linked to contracts, using List Price, Volume Discounts, Tier Discounts, Attribute-Based Price, Bundle-Based Price, and Price Adjustment Matrix elements. These contracted prices can override existing methods, including base price calculations and various discount types. Turn on the contract-based pricing option in a pricing element and provide a value for the Contract Pricing output variable.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Revenue Lifecycle Management is enabled.



SEE ALSO:

[Salesforce Help: Contract-Based Pricing \(can be outdated or unavailable during release preview\)](#)

## Track Pricing Data Using Event Log Files

To get a complete overview of your pricing procedures being executed, use the new Pricing events. Use the Pricing event log file type to measure how long it takes to run the pricing APIs. Use the event log files to track metrics related to pricing status, the error codes generated, and the pricing procedure configured and used.

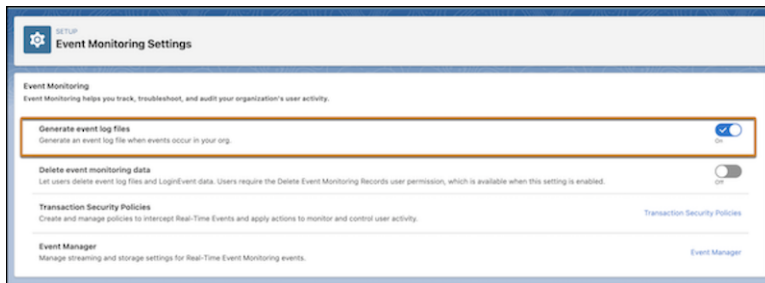
**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Event Monitoring and Salesforce Pricing is enabled.

## Monitor Your Pricing Data From the Operations Console

Get a complete overview of the pricing data from the Operations Console. At a glance, you see the data consumed when pricing operations are performed and the event log files generated during the execution of pricing processes.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Revenue Lifecycle Management is enabled.

**How:** To generate event log files, from Setup, under Event Monitoring Settings, turn on Generate event log files.



From the App Launcher, search for and select **Operations Console**.

SEE ALSO:

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

## Comprehensively Track Product Cost by Using Cost Books

Create and organize multiple cost books to define expenses that occur when you create a product. Set a default cost book and create individual cost book entries to track all the cost factors associated with product creation.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Revenue Lifecycle Management is enabled.

SEE ALSO:

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

[Salesforce Help: Add a Cost Book Entry \(can be outdated or unavailable during release preview\)](#)

## Search for Any Price Book with the Redesigned Price Book Component

The modification of Lightning components, Salesforce Lightning Design System (SLDS) styles, and custom properties help your users use the new record pickers to search for any price book. They are no longer required to depend on the limited options in a dropdown. Previously, the Choose Price Book component was on a type picklist and couldn't show more than 2000 records.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Revenue Lifecycle Management is enabled.

## New Objects in Salesforce Pricing

Do more with these new Salesforce Pricing objects.

**Track the total cost of a product**

Use the new `CostBook` object.

**Associate each cost factor in your cost book with a price**

Use the new `CostBookEntry` object.

**Calculate the price of a product from another product or asset**

Use the new `PriceBookEntryDerivedPrice` object.

**Localize product selling model names**

Use the new `ProductSellingModelDataTranslation` object. Translation Workbench must be enabled for your org.

**Capture the price of a product on a contract**

Use the new `ContractItemPrice` object.

**Connect REST APIs**

Learn more about the updates to the Connect REST APIs in Salesforce Pricing.

**IN THIS SECTION:**

[New and Changed Connect REST API Resources](#)

Get to know the new and changed resources in Salesforce Pricing.

[Changed Connect REST API Request Bodies](#)

These request bodies have changes.

**SEE ALSO:**

[Revenue Lifecycle Management Developer Guide: Salesforce Pricing Business APIs](#)

**New and Changed Connect REST API Resources**

Get to know the new and changed resources in Salesforce Pricing.

**Get the source product for the Price Book Entry (PBE) derived pricing**

Make a POST request to the `/connect/core-pricing/pbeDerivedPricingSourceProduct` resource.

New request body: PBE Derived Pricing Input

New response body: PBE Derived Pricing

**Get the persisted price waterfall**

Make a POST request to the `/connect/core-pricing/waterfall/lineItemId/executionId` resource.

New query parameter: `tagsToFilter`

**Changed Connect REST API Request Bodies**

These request bodies have changes.

Price Context (POST) and Pricing (POST)

**Configuration Override Input**

This request body has these new properties.

- `discoveryProcedure`—Name of the discovery procedure to use to fetch the details of assets.



- `skipDiscovery`—Indicates whether the discovery procedure must be skipped.

## New Metadata Type

Learn more about the new metadata type in Salesforce Pricing.

## Metadata Type

### Manage the settings for Salesforce Pricing

Use the new `IndustriesPricingSettings` metadata type. Introduced in API version 60.0, this metadata type is now added to the Revenue Lifecycle Management Developer Guide.

#### SEE ALSO:

[Revenue Lifecycle Management Developer Guide: IndustriesPricingSettings](#)

## Product Configurator

Easily manage product compatibility and validation with actionable configuration rules. Build flexible bundles by searching and adding qualified products in real-time. Configure products with the currency and percentage attributes that reflect real-world values such as discounts and fees.

#### IN THIS SECTION:

##### [Increase Productivity with Actionable Configuration Rules](#)

Easily manage product compatibility and validation with actionable configuration rules. Use these rules to automatically add or remove products, set product quantities, specify attribute values for products, and display informative messages. You can now create a rule for a product or a product bundle with up to three conditions, three actions, and eight sub-conditions. This enhanced functionality simplifies product configuration, reduces errors, and streamlines the entire process.

##### [Create Flexible and Dynamic Sales Packages](#)

Add products to a bundle when you configure a product. Sales reps can now search and add qualified products to a bundle in real-time, and create flexible and customized sales packages. Additionally, sales reps can add the same product multiple times with a unique name-attribute identifier.

##### [Enhance Product Configuration with Additional Data Types](#)

You can now configure products with the currency and percentage attributes that reflect real-world values like discounts and fees. These attributes are supported in the Product You can now configure products with the currency and percentage data types that reflect real-world values such as discounts and fees. These data types are supported in the Product Configurator Flow, Configurator UI, and Headless API, and provide a smooth data intake

##### [Increase Service Adaptability With Custom Field and Field Mapping Support](#)

Revenue Lifecycle Management now supports custom field mapping for operations such as quote creation, order creation, asset creation, asset update, and contract creation. Add custom fields to Revenue Lifecycle Management objects to meet your business goals. Map the custom fields between objects in the transaction lifecycle for your sales reps. Use the option to map additional fields to enhance the adaptability and utility of Revenue Lifecycle Management service.

##### [New and Changed Objects for Product Configurator](#)

Do more with the new and changed objects in Product Configurator.

##### [Connect REST APIs](#)

Learn more about the new and changed Connect REST APIs in Product Configurator.

## Increase Productivity with Actionable Configuration Rules

Easily manage product compatibility and validation with actionable configuration rules. Use these rules to automatically add or remove products, set product quantities, specify attribute values for products, and display informative messages. You can now create a rule for a product or a product bundle with up to three conditions, three actions, and eight sub-conditions. This enhanced functionality simplifies product configuration, reduces errors, and streamlines the entire process.

**Where:** This change applies to Lightning Experience in Developer, Enterprise, and Unlimited editions where Revenue Lifecycle Management and Product Configurator are enabled.

## Create Flexible and Dynamic Sales Packages

Add products to a bundle when you configure a product. Sales reps can now search and add qualified products to a bundle in real-time, and create flexible and customized sales packages. Additionally, sales reps can add the same product multiple times with a unique name-attribute identifier.

**Where:** This change applies to Lightning Experience in Developer, Enterprise, and Unlimited editions where Revenue Lifecycle Management and Product Configurator are enabled.

## Enhance Product Configuration with Additional Data Types

You can now configure products with the currency and percentage attributes that reflect real-world values like discounts and fees. These attributes are supported in the Product You can now configure products with the currency and percentage data types that reflect real-world values such as discounts and fees. These data types are supported in the Product Configurator Flow, Configurator UI, and Headless API, and provide a smooth data intake

**Where:** This change applies to Lightning Experience in Developer, Enterprise, and Unlimited editions where Revenue Lifecycle Management and Product Configurator are enabled.

## Increase Service Adaptability With Custom Field and Field Mapping Support

Revenue Lifecycle Management now supports custom field mapping for operations such as quote creation, order creation, asset creation, asset update, and contract creation. Add custom fields to Revenue Lifecycle Management objects to meet your business goals. Map the custom fields between objects in the transaction lifecycle for your sales reps. Use the option to map additional fields to enhance the adaptability and utility of Revenue Lifecycle Management service.

**Where:** This change applies to Lightning Experience in Developer, Enterprise, and Unlimited editions where Revenue Lifecycle Management and Product Configurator are enabled.

**Why:** With support for custom field mapping, the values are passed from object to object as your transaction moves from one stage to the other. For example, add a unique Installation Date field, that can be configured in Product Configurator, modified in Quote and Order Capture, and assetized in Asset Lifecycle.

## New and Changed Objects for Product Configurator

Do more with the new and changed objects in Product Configurator.

**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.

### Changed Object

#### Specify the order for executing the configuration rule

Use the new `Sequence` field in the `ProductConfigurationRule` object.

## Connect REST APIs

Learn more about the new and changed Connect REST APIs in Product Configurator.

### IN THIS SECTION:

#### [New Connect REST API Resources](#)

Get to know the resources available with Product Configurator.

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

These response bodies have changes.

### SEE ALSO:

[Revenue Lifecycle Management Developer Guide: Product Configurator Business APIs](#)

## New Connect REST API Resources

Get to know the resources available with Product Configurator.

### **Add a child product line item as a node within a root product**

Make a POST request to the `/connect/cpq/configurator/actions/add-nodes` resource.

New request body: Configurator Add Nodes Input

New response body: Configurator Add Nodes

### **Create a session by passing a transaction ID**

Make a POST request to the `/connect/cpq/configurator/actions/load-instance` resource.

New request body: Configuration Load Instance Input

New response body: Configuration Load Instance

### **Create a session by passing a transaction JSON payload**

Make a POST request to the `/connect/cpq/configurator/actions/set-instance` resource.

New request body: Configuration Set Instance Input

New response body: Configuration Set Instance

### **Delete product line items in a product configuration**

Make a POST request to the `/connect/cpq/configurator/actions/delete-nodes` resource.

New request body: Configurator Delete Nodes Input

New response body: Configurator Delete Nodes

### **Get the JSON representation of a configuration instance**

Make a POST request to the `/connect/cpq/configurator/actions/get-instance` resource.

New request body: Configuration Get Instance Input

New response body: Configuration Get Instance

### **Save a product configuration instance**

Make a POST request to the `/connect/cpq/configurator/actions/save-instance` resource.

New request body: Configuration Save Instance Input

New response body: Configuration Save Instance

**Set the quantity of a product**

Make a POST request to the `/connect/cpq/configurator/actions/set-product-quantity` resource.

New request body: Product Quantity Set Configurator Input

New response body: Product Quantity Set Configurator

**Update product line items in a product configuration**

Make a POST request to the `/connect/cpq/configurator/actions/update-nodes` resource.

New request body: Configurator Update Nodes Input

New response body: Configurator Update Nodes

**Changed Connect REST API Response Bodies**

These response bodies have changes.

Configuration Load Instance (POST)

**Configuration Load Instance**

This response body has this new property.

- `configuratorUIModifications`—Map of a sales transaction ID and a list of configurator UI modifications.

Configuration Set Instance (POST)

**Configuration Set Instance**

This response body has this new property.

- `configuratorUIModifications`—Map of a sales transaction ID and a list of configurator UI modifications.

Product Set Quantity (POST)

**Product Quantity Set Configurator**

This response body has this new property.

- `configuratorUIModifications`—Map of a sales transaction ID and a list of configurator UI modifications.

Configurator Add Nodes (POST)

**Configurator Add Nodes**

This response body has this new property.

- `configuratorUIModifications`—Map of a sales transaction ID and a list of configurator UI modifications.

Configurator Update Nodes (POST)

**Configurator Update Nodes**

This response body has this new property.

- `configuratorUIModifications`—Map of a sales transaction ID and a list of configurator UI modifications.

Configurator Delete Nodes (POST)

**Configurator Delete Nodes**

This response body has this new property.

- `configuratorUIModifications`—Map of a sales transaction ID and a list of configurator UI modifications.

Configuration (POST)

### Configuration Details

This response body has this new property.

- `uiModifications`—Map of a sales transaction ID and a list of configurator UI modifications.

## Quote and Order Capture

Enhance the selling experience with Transaction Line Editor enhancements. Use custom fields to extend Revenue Lifecycle Management. Display unique prices depending on the type of transaction. Generate professional quote documents with Document Builder in Revenue Lifecycle Management. Estimate the tax on your orders. Submit orders to Dynamic Revenue Orchestrator for fulfillment or automatically submit eligible orders for fulfillment.

### IN THIS SECTION:

#### [Transaction Line Editor](#)

Customize the transaction experience for partner users. Manage transactions better with enhancements to the Transaction Line Editor. Know when prices in a transaction are inaccurate and easily refresh them.

#### [Extend Revenue Lifecycle Management With Custom Field Support](#)

Revenue Lifecycle Management now supports custom field mapping for operations such as quote creation, order creation, asset creation, asset update, and contract creation. Add custom fields to Revenue Lifecycle Management objects. Map the custom fields between objects in the transaction lifecycle for your sales reps. Map additional fields apart from the predefined set of fields, to enhance the adaptability and utility of Revenue Lifecycle Management.

#### [Customize Prices for Different Types of Transactions](#)

Trigger different pricing procedures based on the type of transaction by using the Sales Transaction Type object. For each type of transaction, create Sales Transaction Type records and assign pricing procedures to them. For example, create a Sales Transaction Type for B2B or B2B2C transactions with their own pricing procedures. Use Flow builder to default to specific types or give your sales reps permission to override the types. Sales reps can create transactions for different businesses or types of customers, and automatically see the right prices and discounts.

#### [Craft Professional Quote Documents with Document Builder](#)

Give your quote documents an enhanced and professional look by using the capabilities of Document Builder. Use the branding of documents, embedded images, document preview, and the PDF generation features, to ensure that your documents reflect your business goals and meet your customer needs. Drag the standard components in Document Builder onto the Template Builder and easily create beautiful, formatted document templates.

#### [Get Better Cost Estimates by Including Tax Information on Orders](#)

Sales reps, partners, and customers can now view estimated taxes on their orders. When an order is created from a quote, the tax information from the quote is automatically copied to the order. If users make any changes that impact prices on the order, the tax is recalculated. Users can navigate to order product pages to view information such as the tax treatment that was applied and the total amount with tax. They can open the related Order Product Tax Line Item record to view more information such as tax type, tax rate, and the tax effective date.

#### [Easily Submit Orders for Fulfillment](#)

To submit orders to Dynamic Revenue Orchestrator for fulfillment, use the `submitOrder` invocable action from flows or Apex classes. You can use flows and Apex classes to enable sales reps and sales operations reps to manually submit orders or to automatically submit eligible orders for fulfillment. After an order is submitted for orchestration, sales reps can view the fulfillment status.

[New and Changed Objects in Quote and Order Capture](#)

Access more data through these new objects and fields.

[New Invocable Action in Quote and Order Capture](#)

Use the new invocable action in Quote and Order Capture.

[New Metadata Type in Quote and Order Capture](#)

Quote and Order Capture includes a new metadata type to create a contract from quote record.

## Transaction Line Editor

Customize the transaction experience for partner users. Manage transactions better with enhancements to the Transaction Line Editor. Know when prices in a transaction are inaccurate and easily refresh them.

### IN THIS SECTION:

[Accurately Derive Prices in Quotes and Orders](#)

Sales reps can now see automated and customizable prices in the Transaction Line Editor that are priced based on another pricing source, such as a product or an asset. Automatically apply pre-defined pricing rules based on customizable formulas so your sales reps can quickly generate tailored and accurate pricing proposals. Also, sales reps can use the Price Waterfall to see a breakdown of the prices.

[Customize the Transaction Experience for Your Partner Users](#)

Customize the Transaction Line Editor and transaction summary so that your partner users see the right data on their quotes and orders. Also, enable the side panel in the Transaction Line Editor to see the details of all fields for a product.

[Edit Transaction Line Items in Bulk](#)

Select multiple line items in the Transaction Line Editor and update the data for all the items. For example, your sales reps can update the quantity for multiple items in a transaction in just one action.

[Enhance the Transaction Experience for Your Sales Reps](#)

Enhance the productivity of your sales reps with improvements to the Transaction Line Editor.

[Quickly Search and Add Products Across All Catalogs](#)

Previously, in the Add Products search field, the Transaction Line Editor displayed products only from the first catalog. Now, the Add Products search field displays products from all your catalogs so your sales reps can quickly add products from any catalog to their transaction.

[Refresh Inaccurate Prices](#)

When your transaction contains outdated prices, the Transaction Line Editor displays a warning. If necessary, your sales reps can refresh the prices. The reps can also manually update the Validation Status field to submit the transaction.

[Visualize Your Quote and Order Changes](#)

You can visually track the changes you're making to your quotes or orders. When you're amending, renewing, or canceling line items you see easy to read visual badges showing your current actions. Reduce errors and spend less time reviewing and finalizing changes to your customer's multiline quotes or orders.

## Accurately Derive Prices in Quotes and Orders

Sales reps can now see automated and customizable prices in the Transaction Line Editor that are priced based on another pricing source, such as a product or an asset. Automatically apply pre-defined pricing rules based on customizable formulas so your sales reps can quickly generate tailored and accurate pricing proposals. Also, sales reps can use the Price Waterfall to see a breakdown of the prices.

**Where:** This change applies to Lightning Experience in Unlimited, Enterprise, and Developer editions for Industries clouds where Revenue Lifecycle Management is enabled.

**Why:** Define formulas to dynamically calculate the prices for products based on a related product. Say, the insurance for an iPhone is 10% of the iPhone's price. Use derived pricing to dynamically calculate the price of the insurance rather than manually setting the price of insurance for each product.

**How:** Create a pricing procedure by using the updated SalesTransactionContext context definition template, the new predefined Pricing Procedure template, and a decision table that contains the IsDerived field.

## Customize the Transaction Experience for Your Partner Users

Customize the Transaction Line Editor and transaction summary so that your partner users see the right data on their quotes and orders. Also, enable the side panel in the Transaction Line Editor to see the details of all fields for a product.

**Where:** This change applies to Aura sites accessed through Lightning Experience in Enterprise, Unlimited, and Developer editions where Revenue Lifecycle Management is enabled.

**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.

**How:** Edit your Experience Cloud page and click the component that you want to customize. In the properties pane, customize the component to add or remove fields, or enable the side panel for the Transaction Line Editor. For example, move the fields that you want to show to the Selected section, and rearrange them as necessary.

## Edit Transaction Line Items in Bulk

Select multiple line items in the Transaction Line Editor and update the data for all the items. For example, your sales reps can update the quantity for multiple items in a transaction in just one action.

**Where:** This change applies to Lightning Experience in Unlimited, Enterprise, and Developer editions for Industries clouds where Revenue Lifecycle Management is enabled.

**How:** In the Transaction Line Editor, select the line items and click the field that you want to update. Edit or select a value and save your changes.

## Enhance the Transaction Experience for Your Sales Reps

Enhance the productivity of your sales reps with improvements to the Transaction Line Editor.

**Where:** This change applies to Lightning Experience in Developer, Enterprise, and Unlimited editions for Industries clouds where Revenue Lifecycle Management is enabled.

**Why:** The Transaction Line Editor helps your sales reps to:

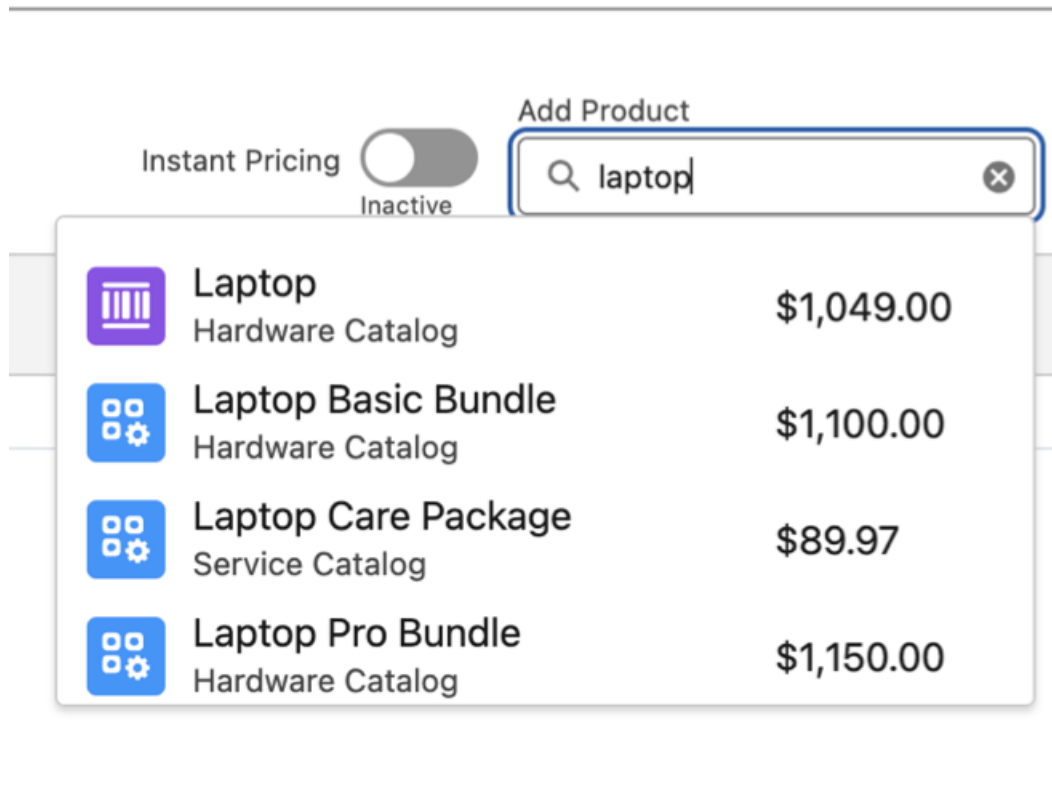
- Easily refer to rows with row numbers. Say, you're a sales rep that wants to verify with a sales operation rep that a large quantity of laptop line items can be fulfilled. When screen sharing the transaction with them, refer to its row number. Then, you can submit the transaction knowing it can be fulfilled.
- Free up rows by hiding the filter rows.
- See links and images for products. For example, see images for products so that they can be easily identified.

## Quickly Search and Add Products Across All Catalogs

Previously, in the Add Products search field, the Transaction Line Editor displayed products only from the first catalog. Now, the Add Products search field displays products from all your catalogs so your sales reps can quickly add products from any catalog to their transaction.

**Where:** This change applies to Lightning Experience in Unlimited, Enterprise, and Developer editions for Industries clouds where Revenue Lifecycle Management is enabled.

**How:** In the Add Product search field of the Transaction Line Editor, search for a product. The names of the products and the names of their catalogs appear.



### Refresh Inaccurate Prices

When your transaction contains outdated prices, the Transaction Line Editor displays a warning. If necessary, your sales reps can refresh the prices. The reps can also manually update the Validation Status field to submit the transaction.

**Where:** This change applies to Lightning Experience in Unlimited, Enterprise, and Developer editions for Industries clouds where Revenue Lifecycle Management is enabled.

**How:** In the warning message above the Transaction Line Editor, click **Refresh Prices**.

### Visualize Your Quote and Order Changes

You can visually track the changes you're making to your quotes or orders. When you're amending, renewing, or canceling line items you see easy to read visual badges showing your current actions. Reduce errors and spend less time reviewing and finalizing changes to your customer's multiline quotes or orders.

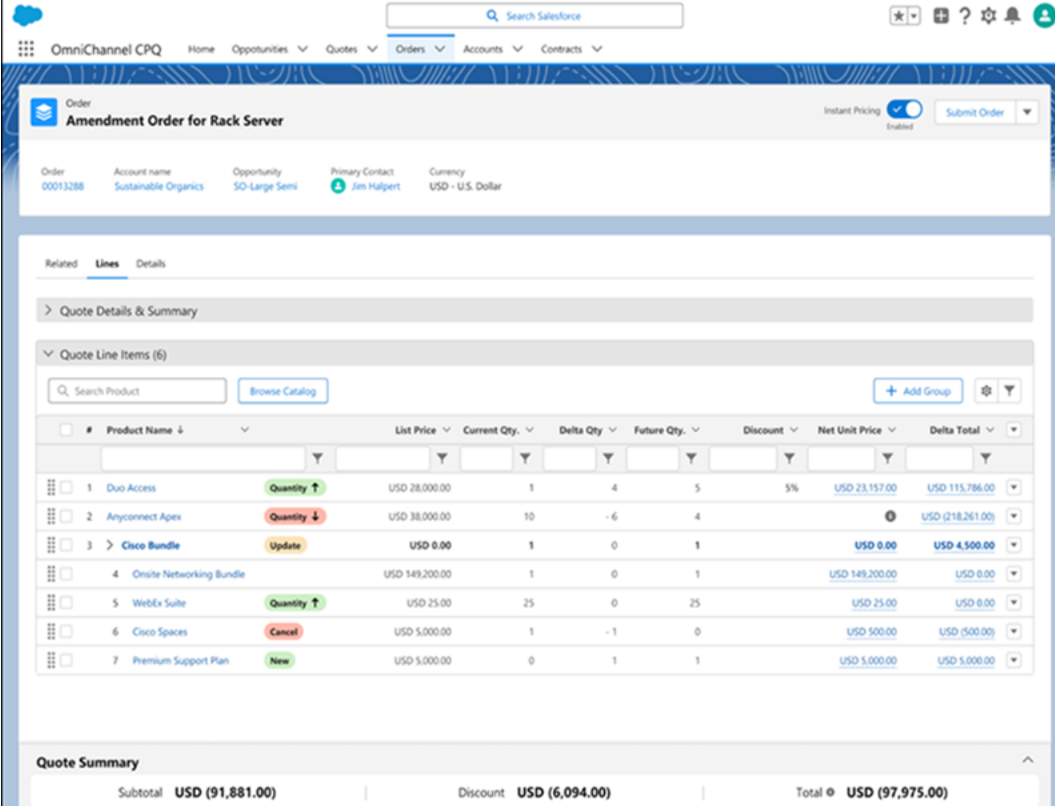
**Where:** This change applies to Lightning Experience in Enterprise, Developer, and Unlimited editions where Revenue Lifecycle Management is enabled.

**Why:** The additional badges in the quote or order transaction line table make it clear what you are changing on each quote or order.

**Note:** These badges don't appear on new or initial sale quotes or orders. They only appear when changes are made to quotes or orders for amendments, renewals, or cancellations.



**How:** The badges appear by default. You can hide them in the current session by selecting **Hide Badges** in the product name column options.



| # | Product Name             | List Price     | Current Qty. | Delta Qty. | Future Qty. | Discount | Net Unit Price | Delta Total    |
|---|--------------------------|----------------|--------------|------------|-------------|----------|----------------|----------------|
| 1 | Duo Access               | USD 28,000.00  | 1            | 4          | 5           | 5%       | USD 23,157.00  | USD 115,786.00 |
| 2 | Anyconnect Apex          | USD 38,000.00  | 10           | -6         | 4           |          | USD 218,261.00 |                |
| 3 | Cisco Bundle             | USD 0.00       | 1            | 0          | 1           |          | USD 0.00       | USD 4,500.00   |
| 4 | Onsite Networking Bundle | USD 149,200.00 | 1            | 0          | 1           |          | USD 149,200.00 | USD 0.00       |
| 5 | WebEx Suite              | USD 25.00      | 25           | 0          | 25          |          | USD 25.00      | USD 0.00       |
| 6 | Cisco Spacs              | USD 5,000.00   | 1            | -1         | 0           |          | USD 500.00     | USD (500.00)   |
| 7 | Premium Support Plan     | USD 5,000.00   | 0            | 1          | 1           |          | USD 5,000.00   | USD 5,000.00   |

**Quote Summary**

|          |                 |          |                |       |                 |
|----------|-----------------|----------|----------------|-------|-----------------|
| Subtotal | USD (91,881.00) | Discount | USD (6,094.00) | Total | USD (97,975.00) |
|----------|-----------------|----------|----------------|-------|-----------------|

## Extend Revenue Lifecycle Management With Custom Field Support

Revenue Lifecycle Management now supports custom field mapping for operations such as quote creation, order creation, asset creation, asset update, and contract creation. Add custom fields to Revenue Lifecycle Management objects. Map the custom fields between objects in the transaction lifecycle for your sales reps. Map additional fields apart from the predefined set of fields, to enhance the adaptability and utility of Revenue Lifecycle Management.

**Where:** This change applies to Lightning Experience in Unlimited, Enterprise, and Developer editions for Industries clouds where Revenue Lifecycle Management is enabled.

**Why:** With support for custom field mapping, the values pass from object to object as your transaction moves from one stage to the other. For example, add a unique Installation Date field that you can configure in Product Configurator, modify in Quote and Order Capture, and assetize in Asset Lifecycle.

## Customize Prices for Different Types of Transactions

Trigger different pricing procedures based on the type of transaction by using the Sales Transaction Type object. For each type of transaction, create Sales Transaction Type records and assign pricing procedures to them. For example, create a Sales Transaction Type for B2B or B2B2C transactions with their own pricing procedures. Use Flow builder to default to specific types or give your sales reps permission to override the types. Sales reps can create transactions for different businesses or types of customers, and automatically see the right prices and discounts.

**Where:** This change applies to Lightning Experience in Unlimited, Enterprise, and Developer editions for Industries clouds where Revenue Lifecycle Management is enabled.

## Craft Professional Quote Documents with Document Builder

Give your quote documents an enhanced and professional look by using the capabilities of Document Builder. Use the branding of documents, embedded images, document preview, and the PDF generation features, to ensure that your documents reflect your business goals and meet your customer needs. Drag the standard components in Document Builder onto the Template Builder and easily create beautiful, formatted document templates.

**Where:** This change applies to Lightning Experience in Developer, Enterprise, and Unlimited editions where Revenue Lifecycle Management is enabled.

**Who:** This feature is available to users with the Document Builder User permission set.

**How:** To enable the feature, from Setup, in the Quick Find box, enter *Revenue Settings*, and then select **Revenue Settings**. Turn on Document Builder.

To create quote document templates, from Setup, in the Quick Find box, enter *Document Builder*, and then select **Document Builder**.

To view the document configured by using Document Builder, on the quotes record page, click **Generate Document**.

## Get Better Cost Estimates by Including Tax Information on Orders

Sales reps, partners, and customers can now view estimated taxes on their orders. When an order is created from a quote, the tax information from the quote is automatically copied to the order. If users make any changes that impact prices on the order, the tax is recalculated. Users can navigate to order product pages to view information such as the tax treatment that was applied and the total amount with tax. They can open the related Order Product Tax Line Item record to view more information such as tax type, tax rate, and the tax effective date.

**Where:** This change applies to Lightning Experience in Developer, Enterprise, and Unlimited editions for Industries clouds where Revenue Lifecycle Management is enabled.

**How:** Set up a tax engine, create a tax policy, and then enable the **Include Estimated Tax in Quotes and Orders** setting.

## Easily Submit Orders for Fulfillment

To submit orders to Dynamic Revenue Orchestrator for fulfillment, use the submitOrder invocable action from flows or Apex classes. You can use flows and Apex classes to enable sales reps and sales operations reps to manually submit orders or to automatically submit eligible orders for fulfillment. After an order is submitted for orchestration, sales reps can view the fulfillment status.

**Where:** This change applies to Lightning Experience in Developer, Enterprise, and Unlimited editions for Industries clouds where Revenue Lifecycle Management and Dynamic Revenue Orchestrator are enabled.

**Who:** Users with the Order Submit User permission set can submit orders to Dynamic Revenue Orchestrator for fulfillment.

## New and Changed Objects in Quote and Order Capture

Access more data through these new objects and fields.

### Store information about the type of a sales transaction

Use the new SalesTransactionType object.

Also, use these new objects.

- SalesTransactionTypeOwnerSharingRule
- SalesTransactionTypeShare

### View if a quote was configured and priced by Revenue Lifecycle Management

Use the new validationResult field in the Quote object.

**View if an order was configured and priced by Revenue Lifecycle Management**

Use the new `ValidationResult` field in the Order object.

**View the orchestration submission status of an order**

Use the new `OrchestrationSbmsStatus` field in the Order object.

**View the price and tax calculation status of an order**

Use the new `CalculationStatus` field in the Order object.

**Specify a custom name that overrides the name of an order item**

Use the new `CustomProductName` field in the OrderItem object.

**Specify the number of terms in the subscription of an order item**

Use the new `SubscriptionTerm` field in the OrderItem object.

**Specify the status and the template used to create a quote document**

Use the new `Status` and `DocumentTemplate` fields in the QuoteDocument object.

**Capture a price of a product on a contract**

Use the new `ContractItemPrice` and `ContractItemPriceHistory` objects.

**Set the pricing source and renewal terms on contracts**

Use the new `PricingSource`, `RenewalTerm2`, and `RenewalTermUnit` fields on the existing Contract object.

## New Invocable Action in Quote and Order Capture

Use the new invocable action in Quote and Order Capture.

**Create a contract from a quote record**

Use the `createContract` action. Introduced in API version 60.0, this invocable action is now added to the Revenue Lifecycle Management Developer Guide.

## New Metadata Type in Quote and Order Capture

Quote and Order Capture includes a new metadata type to create a contract from quote record.

## Salesforce Flow

**Create a contract from a quote record**

Use the `createContract` value in the existing `actionType` field, which is on the `FlowActionCall` subtype on the Flow metadata type. Introduced in API version 60.0, this value is now added to the Revenue Lifecycle Management Developer Guide.

## Asset Lifecycle

Provide sales reps with insights into customer assets and help your company increase customer lifetime value by using Revenue Lifecycle Management.

### IN THIS SECTION:

[Assetize Orders Flow](#)

The Assetize Orders flow is a standard assetization flow that provides added flexibility to users and streamlines the process of assetizing orders. In the past, users needed to assetize their orders using external tools. With the Assetize Orders flow, asset managers can activate an order with a click of a button in the Salesforce user interface. Users can customize the flow to their business needs so that assets can be created on order activation and order fulfillment.

### [Use Contract Pricing to Apply Prices and Discounts](#)

With Contract Pricing, sales reps can negotiate prices and discounts for products to be used in future transactions after the contract is finalized. Automatically create contract prices from quote line prices or discounts by using a flow configuration or create contract pricing on the contract itself. Sales reps can use and apply the negotiated contract pricing on new quotes or orders, renewals, or amendments to satisfy customer's pricing expectations.

### [Create Contract Prices and Discounts Using a Flow](#)

Sales reps can create contract-based prices and discounts using the Create Contract From Quote flow. This flow allows a user to create a contract from a quote and optionally capture quote line item prices or discounts in the contract.

### [Visualize Your Quote and Order Changes](#)

You can visually track the changes you're making to your quotes or orders. When you're amending, renewing, or canceling line items you see easy to read visual badges showing your current actions. Reduce errors and spend less time reviewing and finalizing changes to your customer's multiline quotes or orders.

### [Asset Conversion Tool for Transitioning from Subscription Management to Revenue Lifecycle Management](#)

Using the Asset Conversion Tool, administrators can migrate existing Assets from the Subscription Management (SM) data model to the Revenue Lifecycle Management (RLM) data model, ensuring uninterrupted asset lifecycle operations. The tool enables continued Asset Management capabilities in RLM for Assets created in Subscription Management (SM). The conversion tool enables asset data to be seamlessly migrated so customers can continue managing their install base. After the migration, previous SM assets can be amended, renewed, or canceled in RLM.

### [Customer Community and Customer Community Plus Support for Asset Lifecycle](#)

With Customer Community and Customer Community Plus support for Asset Lifecycle Management, both Customer Community and Customer Community Plus users can see their assets so they can manage their install base. Customers have read-only access to the Managed Asset Viewer.

### [Managed Asset Viewer](#)

With the Managed Asset Viewer, users can now view and edit asset data in a centralized location. Users can expand their view of an asset by selecting the asset name, thus enabling the side panel to see additional details including attributes. Users can also edit data within the Asset Viewer or via the Side Panel. To navigate to the Asset Record, click View on the row action of an asset.

### [New Object in Asset Lifecycle](#)

Access more data through this new object.

## Assetize Orders Flow

The Assetize Orders flow is a standard assetization flow that provides added flexibility to users and streamlines the process of assetizing orders. In the past, users needed to assetize their orders using external tools. With the Assetize Orders flow, asset managers can activate an order with a click of a button in the Salesforce user interface. Users can customize the flow to their business needs so that assets can be created on order activation and order fulfillment.

**Where:** This change applies to customers with Revenue Lifecycle Management enabled.

**Who:** To use the Assetize Orders flow, customers need a Revenue Lifecycle Management license.

**How:** Asset managers can implement an order-to-asset flow that automatically creates assets from their Revenue Lifecycle Management order items. Assets are created when an order changes to Activated or Fulfilled status. Customers can modify the flow — for example, to assetize the order based on a different order status — or they can create a new flow.

## Use Contract Pricing to Apply Prices and Discounts

With Contract Pricing, sales reps can negotiate prices and discounts for products to be used in future transactions after the contract is finalized. Automatically create contract prices from quote line prices or discounts by using a flow configuration or create contract pricing on the contract itself. Sales reps can use and apply the negotiated contract pricing on new quotes or orders, renewals, or amendments to satisfy customer's pricing expectations.

**Where:** This change applies to Lightning Experience in Enterprise, Developer, and Unlimited editions where Revenue Lifecycle Management is enabled.

**Who:** Sales reps with the Salesforce Pricing Design Time User permission set can use this feature.

### Why:

With Contract Pricing, you can:

- Create a contract from a quote.
- Create contract prices and discounts on the contract itself.
- Apply contract prices when pricing a quote or order.
- Apply contract discounts to a quote or order.
- Amend or renew assets to maintain negotiated prices.

### How:

From Setup, in the Quick Find box, enter *Revenue Settings*, and then select **Revenue Settings**. Turn on Access Revenue Lifecycle Management Features.

## Create Contract Prices and Discounts Using a Flow

Sales reps can create contract-based prices and discounts using the Create Contract From Quote flow. This flow allows a user to create a contract from a quote and optionally capture quote line item prices or discounts in the contract.

**Where:** This change applies to Lightning Experience in Enterprise, Developer, and Unlimited editions where Revenue Lifecycle Management is enabled.

**Who:** Admins and users with the Manage Flow permission can create contracts from quotes.

**Why:** The Create Contract From Quote flow helps sales reps give customers the contract prices and discounts that they establish in their business relationship for future use. They can also create a contract without capturing any contract-based prices or discounts.


**How:** In Setup, in the Quick Find box, enter *Flow*, and then select **Flows** under Process Automation. Select the **Create Contract From Quote** screen flow from the All Flows list. To suit your business, customize the standard flow.

## Visualize Your Quote and Order Changes

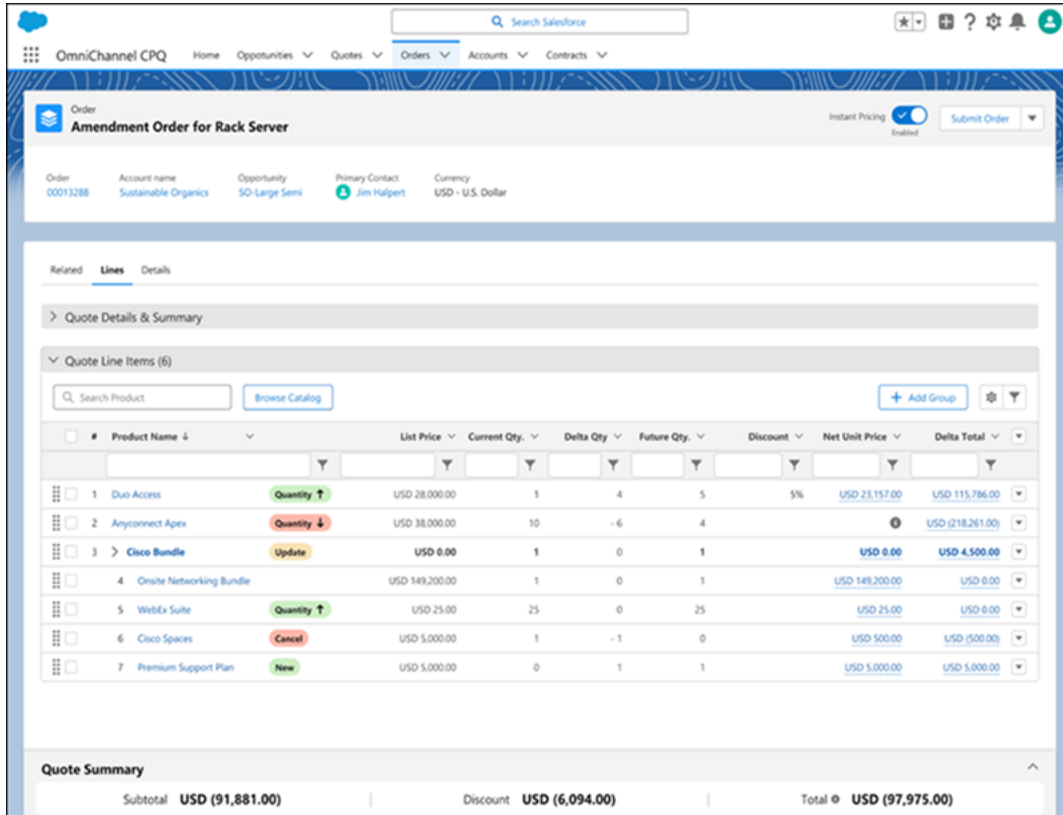
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**Where:** This change applies to Lightning Experience in Enterprise, Developer, and Unlimited editions where Revenue Lifecycle Management is enabled.

**Why:** The additional badges in the quote or order transaction line table make it clear what you are changing on each quote or order.

 **Note:** These badges don't appear on new or initial sale quotes or orders. They only appear when changes are made to quotes or orders for amendments, renewals, or cancellations.

**How:** The badges appear by default. You can hide them in the current session by selecting **Hide Badges** in the product name column options.



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| 2 | Anyconnect Apex          | USD 38,000.00  | 10           | -6         | 4           |          | USD (218,261.00) |                |
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| 4 | Onsite Networking Bundle | USD 149,200.00 | 1            | 0          | 1           |          | USD 149,200.00   | USD 0.00       |
| 5 | WebEx Suite              | USD 25.00      | 25           | 0          | 25          |          | USD 25.00        | USD 0.00       |
| 6 | Cisco Spaces             | USD 5,000.00   | 1            | -1         | 0           |          | USD 500.00       | USD (500.00)   |
| 7 | Premium Support Plan     | USD 5,000.00   | 0            | 1          | 1           |          | USD 5,000.00     | USD 5,000.00   |

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| Subtotal | USD (91,881.00) | Discount | USD (6,094.00) | Total | USD (97,975.00) |
|----------|-----------------|----------|----------------|-------|-----------------|

## Asset Conversion Tool for Transitioning from Subscription Management to Revenue Lifecycle Management

Using the Asset Conversion Tool, administrators can migrate existing Assets from the Subscription Management (SM) data model to the Revenue Lifecycle Management (RLM) data model, ensuring uninterrupted asset lifecycle operations. The tool enables continued Asset Management capabilities in RLM for Assets created in Subscription Management (SM). The conversion tool enables asset data to be seamlessly migrated so customers can continue managing their install base. After the migration, previous SM assets can be amended, renewed, or canceled in RLM.

**Where:** The Asset Conversion Tool is an open-source tool for Salesforce customers. The tool is called the SMTtoRLMAssetConversionTool and is publicly available on GitHub.

**How:** The GitHub page outlines the process of transforming assets from the SM Assets data structure to align with the RLM Assets data format. The person executing the Apex script that runs the tool has read and/or update access on required fields for Asset Actions, Asset Action Sources, Asset Relationships, Order Items, Order Item Relationships, and Product Related Components. Customers can invoke the tool in an Execute Anonymous window on the developer console, or as part of any Apex script. They can then specify a list of Asset IDs they want to convert and call the convert function. Debug logs will indicate if the code executed without error.

## Customer Community and Customer Community Plus Support for Asset Lifecycle

With Customer Community and Customer Community Plus support for Asset Lifecycle Management, both Customer Community and Customer Community Plus users can see their assets so they can manage their install base. Customers have read-only access to the Managed Asset Viewer.

**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.

**Who:** Users can access this feature under the following conditions: They can customize customer communities and can access the components in the Experience Builder OR they're authenticated external users who are meant to access Asset Lifecycle features.

**How:** Create a custom permission set for the Customer Community or Customer Community Plus user license you wish to give access to. Under System Permissions, enable Manage Revenue Lifecycle Management and any combination of "Amend Assets", "Cancel Assets", "Manage Assets", or "Renew Assets". Under "Object Settings" grant Read access to Assets, Asset State Periods, Orders, and Price Books. Assign the permission set to a Customer Community or Customer Community Plus user.

## Managed Asset Viewer

With the Managed Asset Viewer, users can now view and edit asset data in a centralized location. Users can expand their view of an asset by selecting the asset name, thus enabling the side panel to see additional details including attributes. Users can also edit data within the Asset Viewer or via the Side Panel. To navigate to the Asset Record, click View on the row action of an asset.

**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.

**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:** To access the Managed Asset Viewer, make sure that the Assets-related list is on the Account record page. In Lightning App Builder, drag the Managed Asset Viewer to the Account record page, and select the checkbox to show the side panel when a user clicks a record link.

## New Object in Asset Lifecycle

Access more data through this new object.

### Store key-value pairs for asset attributes in asset state periods

Use the new AssetStatePeriodAttribute object.

Introduced in API version 60.0, this object is now added to the Revenue Lifecycle Management Developer Guide.

## Dynamic Revenue Orchestrator (Generally Available)

Dynamic Revenue Orchestrator, or DRO, is a flexible order fulfillment product that is natively built on the Salesforce platform and embedded into end-to-end sales processes. DRO provides a complete view of the entire fulfillment design and runtime, including order decomposition and fulfillment plans, plus jeopardy management, and a graphic UI for enriching products with data.

### IN THIS SECTION:

#### [Enable Dynamic Revenue Orchestrator for Your Org](#)

Enable Dynamic Revenue Orchestrator to work in your org and select the user license. Doing so allows you to get the full power of Dynamic Revenue Orchestrator.

#### [Set Up Permissions and Licenses](#)

Administrators can grant permissions to certain groups of people, allowing them the access they need. For example, a fulfillment operator has to see how an order progresses, but doesn't need access to admin tools. You can also ask someone like a sales rep to submit an order without requiring full access to decomp and orchestration.

### [See Your Fulfillment at a Glance from the Home Page](#)

From the Dynamic Revenue Orchestrator home page, you can view the most important things about your fulfillment, whether that's orders in progress, failed fulfillment steps, pending tasks, and so on. With a click, you can see more details about any aspect of fulfillment that you want to.

### [Define How Order Line Items Decompose](#)

Create Decomposition Rules that define the way that Order Line Items decompose during runtime. You can also add conditions that control when, or whether, such an item is decomposed at all. Then set the scope to determine how many instances of a Fulfillment Order Line Item are created.

### [Design Orchestration Graphically](#)

Create fulfillment steps and organize their dependencies directly within an intuitive graphic interface. Set up reusable step groups and order them by clicking and dragging.

### [Configure Mapping for Fields and Attributes](#)

Using a point and click graphical interface, set up rules for how downstream Fulfillment Order Line Items are enriched with data from Order Line Items. You can choose to pass on a direct copy of the value from the Order Line Item, or set up paired lists of data. For example, a location can be passed as a post code.

### [Monitor Decomposition During Fulfillment](#)

View and work within a graphical interface showing product decomposition. The Decomposition Viewer shows exactly how fulfillment order items were decomposed, helping to validate the correctness of order decomposition, as well as quickly troubleshoot any fallout.

### [View Fulfillment While it Happens](#)

View every fulfillment step as it flows through the fulfillment process. See the status of every step and its dependencies in the Fulfillment Plan graphical interface. With a single click from the plan, you can change the state of a fulfillment step or see its details.

### [Keep Track of Items in Jeopardy](#)

Set up criteria for alerts to let you know when a fulfillment step is taking longer than expected to complete. You can set up when it's in jeopardy and when it's late. The steps are added to a list and appear in a different color in the Fulfillment Plan Viewer.

### [Manage Fallout](#)

Set up how fulfillment steps are handled when they fail. For example, you can define how many times a step is retried. When an order is running, you can see in the Orchestration Plan or a list view which ones have fallen out, and retry or complete them directly.

### [New Objects in Dynamic Revenue Orchestrator](#)

Do more with these new Dynamic Revenue Orchestrator objects.

### [New Metadata Type in Dynamic Revenue Orchestrator](#)

Learn more about the new metadata type in Dynamic Revenue Orchestrator.

### [New Invocable Action in Dynamic Revenue Orchestrator](#)

Use the new invocable action in Dynamic Revenue Orchestrator.

## Enable Dynamic Revenue Orchestrator for Your Org

Enable Dynamic Revenue Orchestrator to work in your org and select the user license. Doing so allows you to get the full power of Dynamic Revenue Orchestrator.

**Where:** This feature is available in Lightning Experience in Developer, Enterprise, and Unlimited editions where Revenue Lifecycle Management is enabled.

**How:** From Setup, in the Quick Find box, enter *Dynamic Revenue Orchestrator Settings* and select it.



## Set Up Permissions and Licenses

Administrators can grant permissions to certain groups of people, allowing them the access they need. For example, a fulfillment operator has to see how an order progresses, but doesn't need access to admin tools. You can also ask someone like a sales rep to submit an order without requiring full access to decomp and orchestration.

**Where:** This feature is available in Lightning Experience in Developer, Enterprise, and Unlimited editions where Revenue Lifecycle Management is enabled.

## See Your Fulfillment at a Glance from the Home Page

From the Dynamic Revenue Orchestrator home page, you can view the most important things about your fulfillment, whether that's orders in progress, failed fulfillment steps, pending tasks, and so on. With a click, you can see more details about any aspect of fulfillment that you want to.

**Where:** This feature is available in Lightning Experience in Developer, Enterprise, and Unlimited editions where Revenue Lifecycle Management is enabled.

## Define How Order Line Items Decompose

Create Decomposition Rules that define the way that Order Line Items decompose during runtime. You can also add conditions that control when, or whether, such an item is decomposed at all. Then set the scope to determine how many instances of a Fulfillment Order Line Item are created.

**Where:** This feature is available in Lightning Experience in Developer, Enterprise, and Unlimited editions where Revenue Lifecycle Management is enabled.

**How:** From the App Launcher, launch **Product Fulfillment Decomposition Rules**.

## Design Orchestration Graphically

Create fulfillment steps and organize their dependencies directly within an intuitive graphic interface. Set up reusable step groups and order them by clicking and dragging.

**Where:** This feature is available in Lightning Experience in Developer, Enterprise, and Unlimited editions where Revenue Lifecycle Management is enabled.

**How:** From the App Launcher, launch **Fulfillment Workspaces**.

## Configure Mapping for Fields and Attributes

Using a point and click graphical interface, set up rules for how downstream Fulfillment Order Line Items are enriched with data from Order Line Items. You can choose to pass on a direct copy of the value from the Order Line Item, or set up paired lists of data. For example, a location can be passed as a post code.

**Where:** This feature is available in Lightning Experience in Developer, Enterprise, and Unlimited editions where Revenue Lifecycle Management is enabled.

**How:** From a Decomposition Rule, click the **Fields & Attributes Mapping** tab. Then click the source and the target directly in the interface. After you've linked the source and target, you're asked for more details.

## Monitor Decomposition During Fulfillment

View and work within a graphical interface showing product decomposition. The Decomposition Viewer shows exactly how fulfillment order items were decomposed, helping to validate the correctness of order decomposition, as well as quickly troubleshoot any fallout.

**Where:** This feature is available in Lightning Experience in Developer, Enterprise, and Unlimited editions where Revenue Lifecycle Management is enabled.

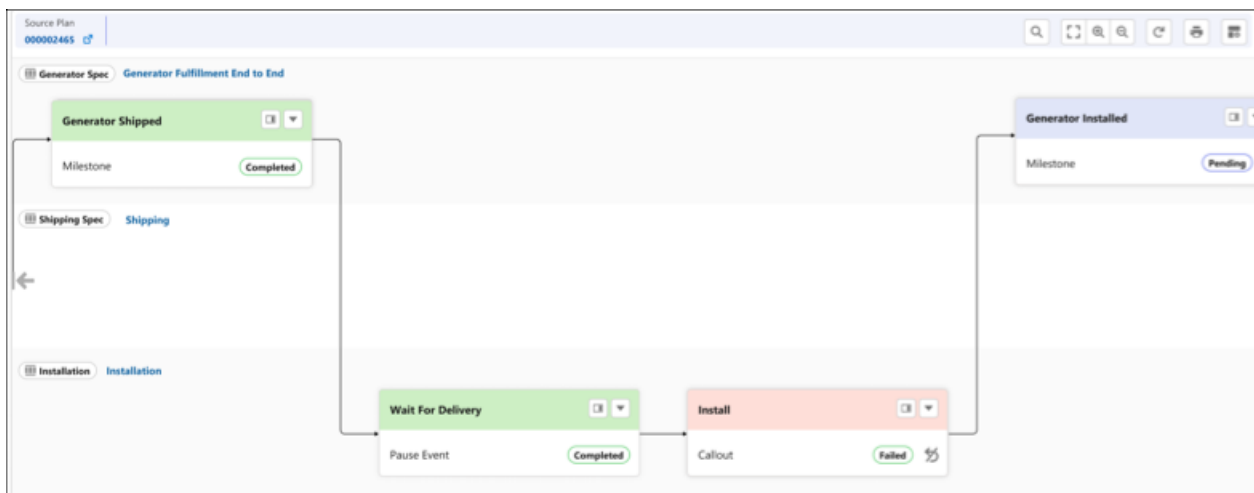
**How:** From an order, click the **Fulfillment Lines** tab.

## View Fulfillment While it Happens

View every fulfillment step as it flows through the fulfillment process. See the status of every step and its dependencies in the Fulfillment Plan graphical interface. With a single click from the plan, you can change the state of a fulfillment step or see its details.

**Where:** This feature is available in Lightning Experience in Developer, Enterprise, and Unlimited editions where Revenue Lifecycle Management is enabled.

**Why:** In the Fulfillment Plan Viewer, Fulfillment Operators can see what's happening with their order. They can see the dependencies between steps, which steps have been completed, and so on. They can also complete a task directly from their workspace, and get more information about that task.



**How:** From the App Launcher, find and select **Fulfillment Plans**, and then edit a fulfillment plan or create one.

## Keep Track of Items in Jeopardy

Set up criteria for alerts to let you know when a fulfillment step is taking longer than expected to complete. You can set up when it's in jeopardy and when it's late. The steps are added to a list and appear in a different color in the Fulfillment Plan Viewer.

**Where:** This feature is available in Lightning Experience in Developer, Enterprise, and Unlimited editions where Revenue Lifecycle Management is enabled.

**How:** To configure jeopardy settings, from Setup, in the Quick Find box, enter *Fallout and SLA Settings*.

## Manage Fallout

Set up how fulfillment steps are handled when they fail. For example, you can define how many times a step is retried. When an order is running, you can see in the Orchestration Plan or a list view which ones have fallen out, and retry or complete them directly.

**Where:** This feature is available in Lightning Experience in Developer, Enterprise, and Unlimited editions where Revenue Lifecycle Management is enabled.

**How:** To configure fallout settings, from Setup, in the Quick Find box, enter *Fallout and SLA Settings*.

## New Objects in Dynamic Revenue Orchestrator

Do more with these new Dynamic Revenue Orchestrator objects.

### **Define the relationship between an ordered asset and its corresponding fulfillment asset**

Use the new AssetFulfillmentDecomp object.

### **Define an instance of a technical product used to provide a customer asset**

Use the new FulfillmentAsset object.

### **Define an attribute of a fulfillment asset**

Use the new FulfillmentAssetAttribute object.

### **Define the fulfillment fallout handling rule**

Use the new FulfillmentFalloutRule object.

### **Define the duration and tolerance for the step in the fulfillment process**

Use the new FulfillmentStepJeopardyRule object.

### **Define how an order is broken into sub-orders with specific technical details that help in order fulfillment.**

Use the new ProductFulfillmentDecompRule object.

### **Define a step that must be executed during fulfillment orchestration**

Use the new FulfillmentStepDefinition object.

### **Create a group of fulfillment step definitions**

Use the new FulfillmentStepDefinitionGroup object.

### **Create a dependency between two fulfillment step definitions**

Use the new FulfillmentStepDependencyDefinition object.

### **Create a link between a product and the corresponding group of fulfillment steps that's necessary to fulfill that product**

Use the new ProductFulfillmentScenario object.

### **Associate a fulfillment step with a type, such as a callout or manual task**

Use the new FulfillmentStepType object.

### **Create a graphic view of the setup steps required to fulfill an order**

Use the new FulfillmentPlan object.

### **Create a fulfillment step that executes during fulfillment of an order**

Use the new FulfillmentStep object.

### **Create a dependency between two fulfillment steps**

Use the new FulfillmentStepDependency object.

### **Create a link between a fulfillment step and corresponding order lines**

Use the new FulfillmentStepSource object.

### **Create mappings between fields and attributes within decomposition**

Use the new ValTfrm object.

### **Create a rule that determines how an order is broken into sub-orders with specific technical details that help in order fulfillment**

Use the new ValTfrmGrp object.

### **Define mappings between fields and attributes for decomposition**

Use the new ProductDecompEnrichmentRule object.

### **Create information about the attributes that are used in the definition for a fulfillment step group**

Use the new FulfillmentWorkspaceItem object.

**Create a visual designer for fulfillment plans**

Use the new FulfillmentWorkspace object.

**Define a set of steps to be created to fulfill the order**

Use the new FulfillmentPlan object.

**Define a relationship between a fulfillment order line and its decomposition source**

Use the new FulfillmentLineSourceRel object.

**Define a relationship between two fulfillment order lines**

Use the new FulfillmentLineRel object.

**Create an attribute of a fulfillment order line**

Use the new FulfillmentLineAttribute object.

**Create a relationship between two fulfillment assets**

Use the new FulfillmentAssetRelationship object.

## New Metadata Type in Dynamic Revenue Orchestrator

Learn more about the new metadata type in Dynamic Revenue Orchestrator.

### Salesforce Flow

**Submit an order for fulfillment**

Use the new `submitOrder` 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 Dynamic Revenue Orchestrator](#)

## New Invocable Action in Dynamic Revenue Orchestrator

Use the new invocable action in Dynamic Revenue Orchestrator.

**Submit an order for fulfillment**

Use the new `submitOrder` action.

SEE ALSO:

[Revenue Lifecycle Management Developer Guide: Submit Order Action](#)

## Salesforce Billing

Salesforce Billing provides usability improvements that make it easier to identify and fix batch invoice run errors.

IN THIS SECTION:

[Improved Clean Up Process for Invoice Runs](#)

The invoice run clean-up process updates the status of invoice lines to Canceled. If the clean-up process encounters errors, decrease the clean-up's batch size to help its completion. The improved error logs help you differentiate between invoice run and clean-up errors.

### [New Metadata Type](#)

Learn more about the new metadata type in Salesforce Billing.

## Improved Clean Up Process for Invoice Runs

The invoice run clean-up process updates the status of invoice lines to Canceled. If the clean-up process encounters errors, decrease the clean-up's batch size to help its completion. The improved error logs help you differentiate between invoice run and clean-up errors.

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

**How:** From Setup, in the Quick Find box, enter *Installed Packages*, and then select **Installed Packages**. Click **Configure** for the Salesforce Billing package, go to the Invoice tab, and then turn on Invoice Run Clean Up.

From Object Manager or the Picklist Value Sets setup page, add the Completed with errors value to the CleanUp Status field of the Invoice Run object.

To define the invoice run clean-up batch size, configure the Invoice Run Clean Up Batch Size setting.

### SEE ALSO:

[Salesforce Help: Invoice Package Settings \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Cleaning up Invoice Runs \(can be outdated or unavailable during release preview\)](#)

## New Metadata Type

Learn more about the new metadata type in Salesforce Billing.

### Metadata Type

#### Manage the settings for Salesforce Billing

Use the new `InvLatePymntRiskCalc` metadata type. Introduced in API version 55.0, this metadata type is now added to the Revenue Lifecycle Management Developer Guide.

Use the new `CollectionsDashboard` metadata type. Introduced in API version 56.0, this metadata type is now added to the Revenue Lifecycle Management Developer Guide.

## Salesforce Subscription Management

Learn more about the new metadata type in Salesforce Subscription Management.

### Metadata Type

#### Manage the settings for Salesforce Subscription Management

Use the new `SubscriptionManagementSettings` metadata type. Introduced in API version 55.0, this metadata type is now added to the Revenue Lifecycle Management Developer Guide.

# Sales

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Boost your sales teams' results with new features across Sales Cloud. Sales rep's get a boost to their productivity with standard and custom list view actions in the Account, Contact, and Lead Intelligence views. Use Generative Conversation Insights to create custom insights for video calls and get answers to things such as customer sentiment or deal terms. Sales managers have more flexibility in how they view forecasts. Enablement has an improved test and deploy experience for sales programs. And in Salesforce Maps, users experience better performance when plotting for high-volume data.

## IN THIS SECTION:

### [Einstein for Sales](#)

Check out the new Einstein for Sales features. Let Einstein draft sales emails from a sales rep's inbox and include related information with generative AI. Ramp up on accounts and opportunities by visualizing your contacts in a relationship map. Add buyer profile data to your contacts automatically to avoid manual data entry. Sales reps can draft meeting request emails, with possible meeting slots and a link to the sender's calendar, using Einstein generative AI.

### [Sales Foundations](#)

Find your next best customer with the power of AI. Create contacts automatically from email and calendar activity. Apply personal labels to organize and find records. Get more information on the Seller Home page. And boost productivity with the power of standard and custom list view actions in the Account, Contact, and Lead Intelligence views.

### [Einstein Conversation Insights](#)

Create custom insights powered by generative AI with Generative Conversation Insights. Einstein Conversation Insights can now process single-user meetings. Users can also easily expand edit access to record collections, and we've rolled out more dashboard improvements.

### [Sales Engagement](#)

Link cadences, use screen flows as cadence steps, save cadences in any folder, and create and edit email templates in Cadence Builder 2.0. Prepare for Cadence Builder Classic retirement.

### [Revenue Intelligence](#)

Nurture relationships with stakeholders and identify opportunities to expand markets with lead metrics in the Einstein Account Management Account Inspector. Update your revenue data more frequently with the new hourly app refresh schedule. Explore all the Revenue Insights resources after a successful app installation using the Resources tab.

### [Collaborative Forecasts](#)

Sales managers can choose to review forecast rollups by team, then by forecast group or product family, or by group or product family, then by team.

### [Pipeline Inspection](#)

Boost productivity with the power of standard and custom list view actions in Pipeline Inspection. Get insight into potentially risky contacts on a deal.

### [Sales Programs and Partner Tracks with Enablement](#)

Elevate the performance, confidence, and impact of your sales team and drive business growth with a community of informed and engaged partners. Give sales reps immediate, actionable feedback on their sales pitches, courtesy of Einstein, all in their flow of work. Create programs that align with your most complex revenue metrics, and provide more transparency and accountability to users who take your programs. Integrate the governance of your Enablement rollout with other Salesforce systems and processes.

### [Partner Relationship Management](#)

Partner sellers can get help drafting personalized, thoughtful emails to their contacts and leads quickly with an assist from Einstein generative AI.

### [Sales Performance Management](#)

Get a serious bump in processing performance while plotting high-volume data such as ArcGIS Online layers and complex shape layers when you enable the new Salesforce Maps framework. Plan for and centralize your company's unique segmentation, territories, and quota targets in Sales Planning. And determine compensation for reps based on their effective territory assignment dates in Enterprise Territory Management, now named Sales Territories.

### [Email, Calendar, and Integrations](#)

Sales reps can use generative AI in their Salesforce email integrations. Inbox mobile has been retired. The retirement date for Salesforce for Outlook has been extended.

### [Sales Cloud Everywhere](#)

As sales reps search for prospects on the internet, the Sales Cloud Everywhere Chrome extension keeps up with their web investigations. And sales reps can choose which fields to see in their detail pages, and in which order.

### [Other Changes in the Sales Cloud](#)

Learn about other changes we made in Summer '24.

## Einstein for Sales

Check out the new Einstein for Sales features. Let Einstein draft sales emails from a sales rep's inbox and include related information with generative AI. Ramp up on accounts and opportunities by visualizing your contacts in a relationship map. Add buyer profile data to your contacts automatically to avoid manual data entry. Sales reps can draft meeting request emails, with possible meeting slots and a link to the sender's calendar, using Einstein generative AI.

### IN THIS SECTION:

#### [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 or by using generative AI. Email types can include product information or related objects.

#### [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.

#### [Einstein Automated Contacts Is Being Retired in February 2025](#)

To build content-rich profiles for all your contacts, we recommend moving to Automatic Contact Creation. This feature replaces Einstein Automated Contacts and gives users new capabilities.

#### [Get Better Performance for Activity 360 Reporting](#)

If you have fewer than 1.5 million combined accounts, contacts, contracts, leads, and opportunities, your Salesforce org is eligible to use Activity 360 reporting. Previously, you could have up to 3 million combined accounts, contacts, contracts, leads, and opportunities were eligible, but could experience decreased performance.

#### [Einstein Copilot for Sales](#)

Sales Copilot topics help sellers effectively handle deal closures, maintain a proactive customer communication approach, and forecast sales revenue. Sales Copilot actions are mapped to these topics to improve the accuracy and consistency of copilot responses and conversational quality overall.

#### [Relationship Selling](#)

Close deals faster by visualizing your contacts in a relationship map. Let Einstein generative AI add buyer profile data to your contacts automatically. No more manual data entry is required.

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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 or by using generative AI. Email types can include product information or related objects.

**Where:** This feature is available in Lightning Experience in Performance and Unlimited editions. Einstein generative AI is available in Lightning Experience.

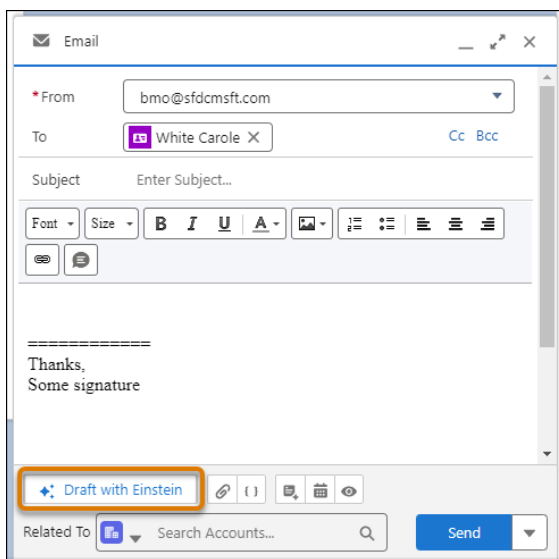
To purchase Einstein for Sales, contact your Salesforce account executive.

**Who:** To use Einstein 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.

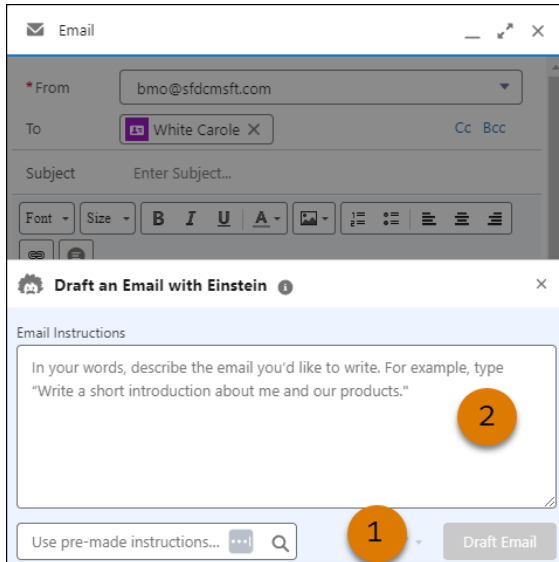
**How:** In Lightning Experience, Einstein Sales Emails is built directly into the email composer. In Salesforce Outlook or Gmail integrations, users can see Einstein generative AI features in the email application pane.

Start creating an email. Then click **Draft with Einstein**.



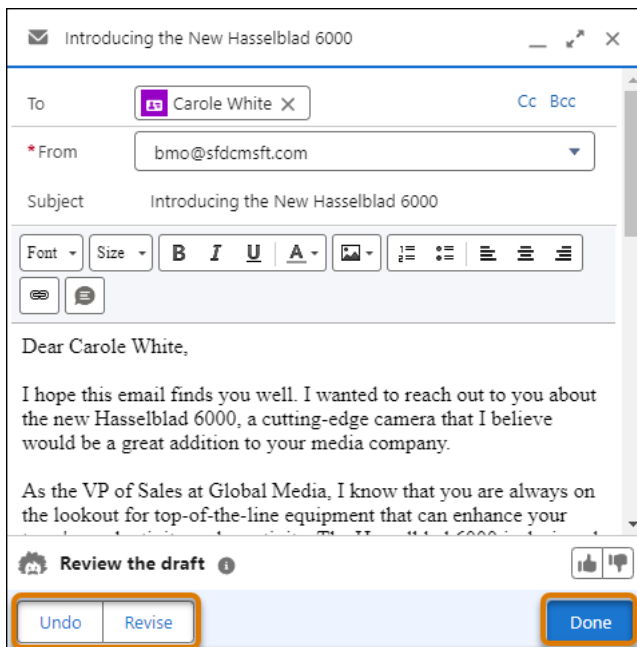
Choose between pre-made email instructions (1) or enter your own instructions (2) for Einstein and click **Draft Email**. The pre-made instructions can be default instructions or custom instructions created by your company's admin.





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**.

A proposed draft email appears for review.



Review and edit the email, and then send it.

SEE ALSO:

[Salesforce Help: Draft a Sales Email with Einstein Generative AI \(can be outdated or unavailable during release preview\)](#)

## 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.

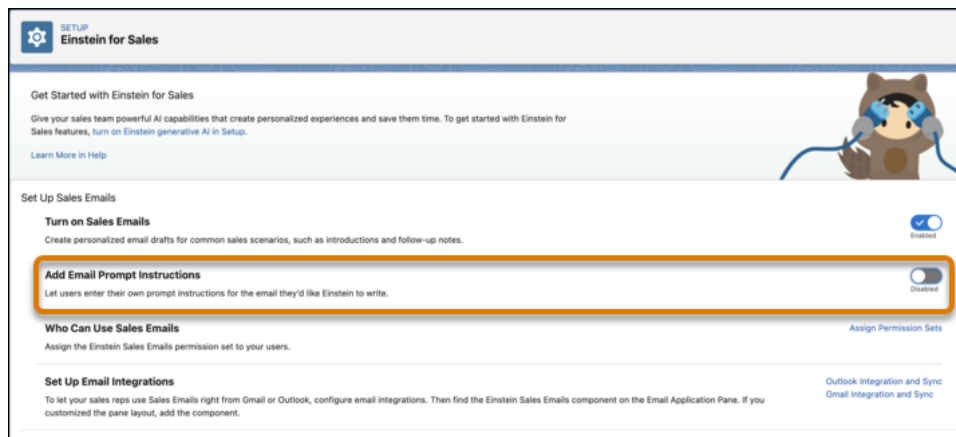
**Where:** This feature is available in Lightning Experience in Performance and Unlimited editions, when using the Lightning email composer. Einstein generative AI is available in Lightning Experience.

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:

[Salesforce Help: Control If Users Can Enter Their Own Sales Email Prompt Instructions \(can be outdated or unavailable during release preview\)](#)

## Einstein Automated Contacts Is Being Retired in February 2025

To build content-rich profiles for all your contacts, we recommend moving to Automatic Contact Creation. This feature replaces Einstein Automated Contacts and gives users new capabilities.

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

**How:** When Einstein Automated Contacts is retired, Salesforce won't suggest new contacts and opportunity contact roles. Salesforce admins and users also lose access to Einstein Contact Suggestions and Einstein Opportunity Contact Role Suggestions items on the App Launcher, the Added by Einstein list view, and other items.

SEE ALSO:

[Knowledge Article: Einstein Automated Contacts Retirement](#)

## Get Better Performance for Activity 360 Reporting

If you have fewer than 1.5 million combined accounts, contacts, contracts, leads, and opportunities, your Salesforce org is eligible to use Activity 360 reporting. Previously, you could have up to 3 million combined accounts, contacts, contracts, leads, and opportunities were eligible, but could experience decreased performance.

**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.

SEE ALSO:

[Salesforce Help: Get Started with Activity 360 Reports](#)

## Einstein Copilot for Sales

Sales Copilot topics help sellers effectively handle deal closures, maintain a proactive customer communication approach, and forecast sales revenue. Sales Copilot actions are mapped to these topics to improve the accuracy and consistency of copilot responses and conversational quality overall.

IN THIS SECTION:

[Accomplish More with Sales Copilot Topics](#)

We've added four new topics that enhance seller efficiency by providing clearer and more targeted copilot responses to accomplish various sales activities. The Close Deals, Manage Deals, Communicate with Customer, Conversation Explorer, and Forecast Sales Revenue topics encompass Sales Copilot actions that are strategically organized to help sellers accomplish more by staying focused on actions and data that are most relevant to the current conversation.

[Improve the Convenience of Setting Up Meeting Requests](#)

Empower your team to conveniently use AI-generated sales meeting requests and boost productivity. Your team can generate customized emails to request meetings. When a seller asks Einstein to schedule a meeting with a customer, the Send Meeting Request copilot action drafts an email to request for a meeting. The draft contains three possible meeting time slots, a link to view the meeting slots on a new web page, and a link to the sender's calendar.

## Accomplish More with Sales Copilot Topics

We've added four new topics that enhance seller efficiency by providing clearer and more targeted copilot responses to accomplish various sales activities. The Close Deals, Manage Deals, Communicate with Customer, Conversation Explorer, and Forecast Sales Revenue topics encompass Sales Copilot actions that are strategically organized to help sellers accomplish more by staying focused on actions and data that are most relevant to the current conversation.

**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.

**Who:** This feature is available to users with the Use Einstein Copilot for Salesforce permission set.

**How:** To get started, turn on Einstein Generative AI in Setup. Next, turn on Einstein Copilot for Salesforce from the Einstein Copilot page in Setup. Then, click the name of your copilot, and click **Open in Copilot Builder**. Add the required topic from the asset library. Copilot actions that are categorized under the selected topic are automatically added to the copilot. Then, click **Activate**.

It's recommended that you add sales topics to Einstein Copilot after you migrate to the Advanced planner service.

SEE ALSO:

[Salesforce Help: Handle More Use Cases More Consistently with Copilot Topics](#)

[Salesforce Help: The Building Blocks of Einstein Copilot](#)

[Salesforce Help: Einstein Copilot for Sales Setup](#)

## Improve the Convenience of Setting Up Meeting Requests

Empower your team to conveniently use AI-generated sales meeting requests and boost productivity. Your team can generate customized emails to request meetings. When a seller asks Einstein to schedule a meeting with a customer, the Send Meeting Request copilot action drafts an email to request for a meeting. The draft contains three possible meeting time slots, a link to view the meeting slots on a new web page, and a link to the sender's calendar.

**Where:** Einstein generative AI is available in Lightning Experience. 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.

**Who:** This feature is available to users with the Send Meeting Request and Inbox Without Einstein Activity Capture permission sets. Users also need the Use Einstein Copilot for Salesforce permission to access Copilot and the Execute Prompt Templates permission to run prompt templates.

To let reps access the feature in Gmail or Outlook, set up the Gmail and Outlook integration.

**How:** To get started with the Send Meeting Request copilot action, turn on Einstein Generative AI in Setup. Next, turn on Make Inbox Available to Users in the EmailqSetup page. Then, turn on Einstein Copilot for Salesforce from the Einstein Copilot page in Setup. Add the Send Meeting Request action and assign the required user permissions.

SEE ALSO:

[Salesforce Help: Copilot Action: Send Meeting Request](#)

[Salesforce Help: Einstein Copilot for Sales Setup](#)

[Salesforce Help: Set Up Einstein Copilot](#)

## Relationship Selling

Close deals faster by visualizing your contacts in a relationship map. Let Einstein generative AI add buyer profile data to your contacts automatically. No more manual data entry is required.

IN THIS SECTION:

[Visualize Key Contacts on the Buyer Relationship Map](#)

On opportunities and accounts, you can now visualize contacts across company levels with the buyer relationship map. Discover key stakeholders, deal champions, potential risks, and more. Let insights recommend contacts for you to add and update.

[Add Company and Buyer Information to Contacts Automatically](#)

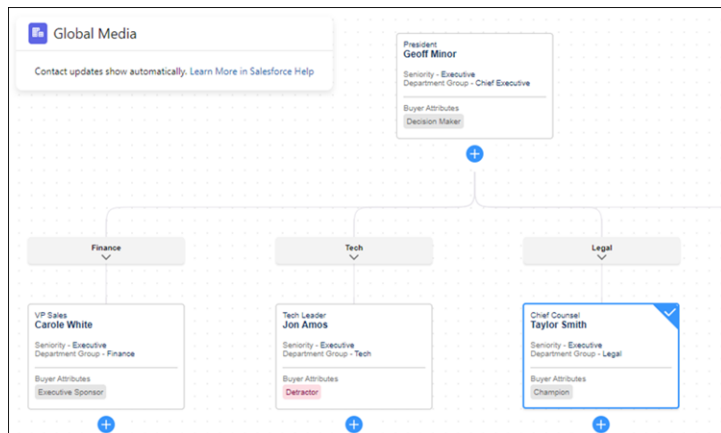
Let Einstein generative AI identify and add your contacts' phone, address, title, seniority level, department group, and buyer attributes automatically from email interactions. Build content-rich profiles for all your contacts to show on buyer relationship maps to help close deals.

## Visualize Key Contacts on the Buyer Relationship Map

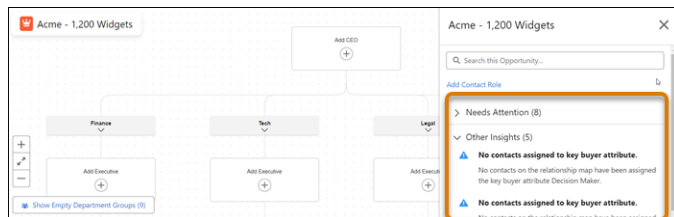
On opportunities and accounts, you can now visualize contacts across company levels with the buyer relationship map. Discover key stakeholders, deal champions, potential risks, and more. Let insights recommend contacts for you to add and update.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Einstein 1 Sales Edition editions with Sales Cloud that have Buyer Relationship Map enabled.

**Why:** For example, here's a relationship map for the Global Media account. Contacts' seniority level, department group, and buyer attributes such as their role in the account are shown.



This relationship map for an Acme opportunity has insights to help you complete the map.



**How:** From Setup, in the Quick Find box, enter *map*, and then select **Buyer Relationship Map**. To show contacts on the map, contacts must have values for Seniority Level and Department Group. To automatically complete these values from your email activity, enable Automatic Contact Enhancements.

SEE ALSO:

[Identify Potentially Risky Contacts on Deals](#)

[Salesforce Help: Buyer Relationship Map \(can be outdated or unavailable during release preview\)](#)

## Add Company and Buyer Information to Contacts Automatically

Let Einstein generative AI identify and add your contacts' phone, address, title, seniority level, department group, and buyer attributes automatically from email interactions. Build content-rich profiles for all your contacts to show on buyer relationship maps to help close deals.

**Where:** This change applies to Lightning Experience in Professional, Enterprise, Performance, Unlimited, Einstein 1 Sales Edition, and Developer editions with Sales Cloud that have Einstein Activity Capture enabled. Einstein generative AI is available in Lightning Experience.

**How:** From Setup, in the Quick Find box, enter *autocreation*, and then select **Autocreation Settings**. Enable Automatic Contact Enhancements.

To show contacts on a buyer relationship map, they must have values for Seniority Level and Department Group fields. Fill in these values automatically by enabling Automatic Contact Enhancements.

|   | Name          | Account Name          | Email                            | Seniority Level     | Department Group | Buyer Attributes                    |
|---|---------------|-----------------------|----------------------------------|---------------------|------------------|-------------------------------------|
| 1 | Alex Bell     | Urso Major Solar, Inc | alex.bell@ursomajorsolar.com     | Executive           | Human Resources  | Detractor                           |
| 2 | Andy Pan      | Urso Major Solar, Inc | andy.pan@ursomajorsolar.com      | Director or Manager | Tech             | Technical Expert                    |
| 3 | Barry Dickson | Urso Major Solar, Inc | barry.dickson@ursomajorsolar.com | Executive           | Finance          | Champion                            |
| 4 | Blake Camp    | Urso Major Solar, Inc | blake.camp@ursomajorsolar.com    | VP                  | Tech             | Executive Sponsor                   |
| 5 | Carol Right   | Urso Major Solar, Inc | carol.right@ursomajorsolar.com   | CEO                 | Chief Executive  | Executive Sponsor                   |
| 6 | Jack Barnett  | Urso Major Solar, Inc | jack.barnett@ursomajorsolar.com  | Executive           | Tech             | Executive Sponsor, Technical Expert |
| 7 | John Doe      | Urso Major Solar, Inc | john.doe@ursomajorsolar.com      | VP                  | Human Resources  | Decision Maker, Evaluator           |
| 8 | Sara Burns    | Urso Major Solar, Inc | sara.burns@ursomajorsolar.com    | VP                  | Finance          | Executive Sponsor                   |
| 9 | Troy Sun      | Urso Major Solar, Inc | troy.sun@ursomajorsolar.com      | VP                  | Legal            | Decision Maker                      |

Buyer Attributes, Department Group, and Seniority Level fields are available for all user profiles except custom and minimum-access. To provide access, use field-level security in Object Manager.

**Important:** Automatic Contact Enhancements doesn't update contacts added by Automatic Contact Creation unless they're in a Buyer Relationship Map.

SEE ALSO:

[New and Changed Objects](#)

[Einstein Features](#)

[Salesforce Help: Automatic Contact Enhancements \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: How Automatic Contact Enhancements Works with the Buyer Relationship Map \(can be outdated or unavailable during release preview\)](#)

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

## Sales Foundations

Find your next best customer with the power of AI. Create contacts automatically from email and calendar activity. Apply personal labels to organize and find records. Get more information on the Seller Home page. And boost productivity with the power of standard and custom list view actions in the Account, Contact, and Lead Intelligence views.

IN THIS SECTION:

[Contacts](#)

Let Salesforce create contacts automatically from your email and calendar activity. Also, add buyer profile data to your contacts automatically through Einstein generative AI.

[Activities](#)

The To Do list now saves filters, sort order, and side panel visibility.

[Organize and Find Records Easily with Personal Labels](#)

Now users can apply their own labels to records to help them organize, track, and find the records they need quickly and easily. Add labels to records related to a region, project, campaign, or anything else that helps keep work organized. Labels that users add to records are separate from labels that are added to To Do List items.

### [Grant Access to the Label Object In Custom Profiles To Continue Using To Do List Labels \(Release Update\)](#)

The Label object is now available in the API. This change supports the Record Labels feature in Sales Cloud. Standard profiles include access to the Label object automatically. If you use custom profiles, add access to the Label object to let users assign labels to records and continue using labels in the To Do List.

### [See More Valuable Information in Seller Home](#)

Seller Home now includes information about a user's best prospects, forecast commit, and Salesblazer articles. With a fuller view of their landscape, reps can pinpoint exactly where they need to start their day.

### [IdeaExchange Delivered: Save Time with More Actions in the Intelligence Views](#)

Boost productivity with the power of standard and custom list view actions in the Account, Contact, and Lead Intelligence views. For example, send an email to an entire list of contacts; change ownership for multiple leads; or add a label to a group of accounts. Select up to 200 records and update them in bulk instead of one at a time. And, now you can update multiple records to the same value inline. We delivered this feature thanks to your ideas on IdeaExchange.

## Contacts

Let Salesforce create contacts automatically from your email and calendar activity. Also, add buyer profile data to your contacts automatically through Einstein generative AI.

### IN THIS SECTION:

#### [Create Contacts Automatically from Email and Calendar Interactions](#)

Never create a contact from scratch again. You can also set a threshold to create or suggest contacts after they're mentioned in your email or event activity up to 3 times.

#### [Enhance Your Contact Information Automatically](#)

Use generative AI and Automatic Contact Enhancements to add phone, address, title, seniority level, department group, and buyer attributes (such as decision maker or detractor) automatically to your contacts based on sales activity. You can show contacts with this information on a buyer relationship map, which helps you visualize key players in your deal or account.

#### [Accessibility Enhanced in Contact Suggestions](#)

In the Contact Suggestions area on your Seller Home page, the Found In link shows an activity timeline. To improve accessibility in the activity timeline window, the link on the email or event has been removed. Now, to show email or event text, click > in the window.

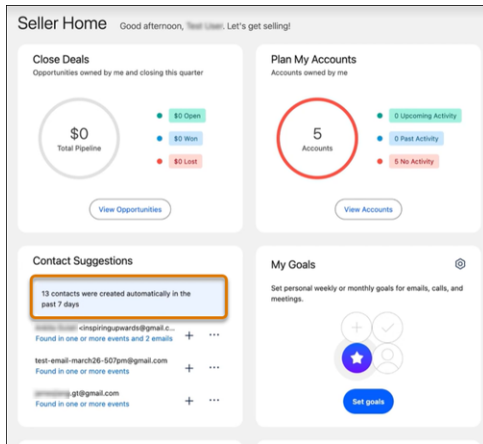
## Create Contacts Automatically from Email and Calendar Interactions

Never create a contact from scratch again. You can also set a threshold to create or suggest contacts after they're mentioned in your email or event activity up to 3 times.

**Where:** This change applies to Lightning Experience in Professional, Enterprise, Performance, Unlimited, Einstein 1 Sales Edition, and Developer editions with Sales Cloud that have Einstein Activity Capture enabled.

**How:** From Setup, in the Quick Find box, enter *autocreation*, and then select **Autocreation Settings**. Enable Automatic Contact Creation and set a threshold as to how many times a person is mentioned in email or event activity before a contact is created or suggested automatically.

On Seller Home, see how many contacts were automatically created in the last 7 days.



**Important:** Automatic Contact Enhancements doesn't update contacts added by Automatic Contact Creation unless they're in a Buyer Relationship Map.

SEE ALSO:

[Salesforce Help: Automatic Contact Creation](#)

[Salesforce Help: Einstein Activity Capture](#)

## Enhance Your Contact Information Automatically

Use generative AI and Automatic Contact Enhancements to add phone, address, title, seniority level, department group, and buyer attributes (such as decision maker or detractor) automatically to your contacts based on sales activity. You can show contacts with this information on a buyer relationship map, which helps you visualize key players in your deal or account.

**Where:** This change applies to Lightning Experience in Professional, Enterprise, Performance, Unlimited, Einstein 1 Sales Edition, and Developer editions with Sales Cloud that have Einstein Activity Capture enabled. Einstein generative AI is available in Lightning Experience.

SEE ALSO:

[Add Company and Buyer Information to Contacts Automatically](#)

[Einstein Features](#)

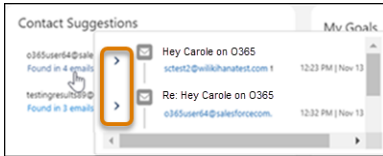
## Accessibility Enhanced in Contact Suggestions

In the Contact Suggestions area on your Seller Home page, the Found In link shows an activity timeline. To improve accessibility in the activity timeline window, the link on the email or event has been removed. Now, to show email or event text, click > in the window.

**Where:** This change applies to Lightning Experience in Professional, Enterprise, Performance, Unlimited, Einstein 1 Sales Edition, and Developer editions with Sales Cloud that have Einstein Activity Capture enabled.

**How:** In the Contact Suggestions tile on Seller Home, click the **Found in** link to see the activity from which Einstein suggested the potential contact. Then, click > to show the text of the activity.





SEE ALSO:

[Salesforce Help: See an Overview of Metrics, Goals, Suggestions, Tasks, and Activities in Seller Home](#)

## Activities

The To Do list now saves filters, sort order, and side panel visibility.

IN THIS SECTION:

[Return to Your To Do List Exactly as You Left It](#)

The To Do List now helps users pick up right where they left off from the previous session by remembering their filters, sort order, and side panel visibility.

### Return to Your To Do List Exactly as You Left It

The To Do List now helps users pick up right where they left off from the previous session by remembering their filters, sort order, and side panel visibility.

**Where:** This change applies to Lightning Experience in Enterprise, Professional, and Unlimited editions with Sales Cloud.

## Organize and Find Records Easily with Personal Labels

Now users can apply their own labels to records to help them organize, track, and find the records they need quickly and easily. Add labels to records related to a region, project, campaign, or anything else that helps keep work organized. Labels that users add to records are separate from labels that are added to To Do List items.

**Where:** This change applies to Lightning Experience in Enterprise, Professional, and Unlimited editions with Sales Cloud.

**Why:** When users add labels to records, they can quickly view all records with a specific label, as well as the list of labels they've created. Each user creates and manages their own set of labels.

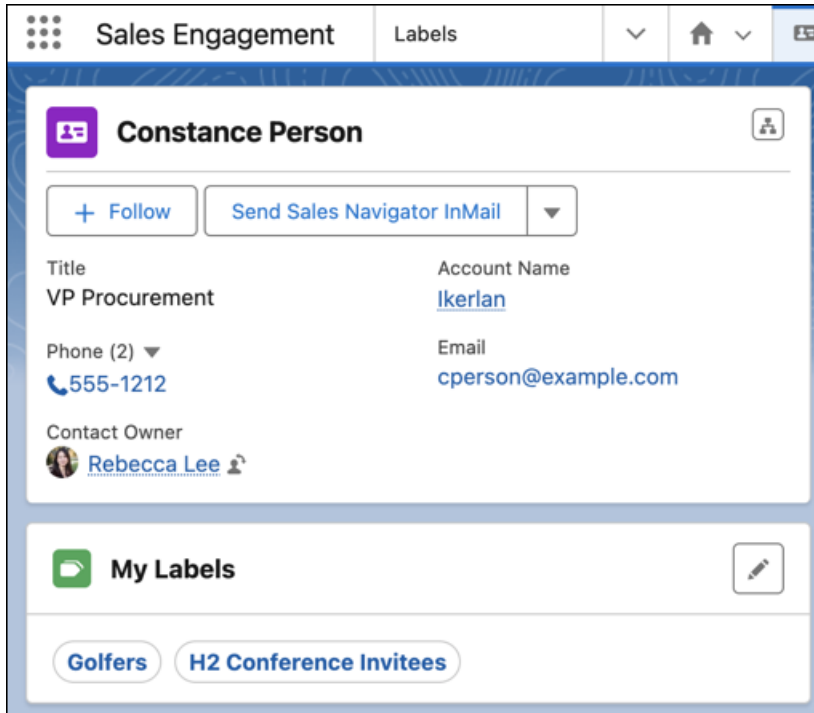
You can add labels to records on these objects.

- Account
- Cadence
- Cadence Step Tracker
- Call Script
- Campaign
- Contact
- Case
- Email Template
- Lead
- Opportunity
- Orchestration Work Item

- Task
- Custom objects

Personal labels added to records are separate from Topics, which other users can see.

**How:** To see the labels you've added to a record in the My Labels component, add the component to your page layouts.



View the list of labels you've created on the Labels home page.

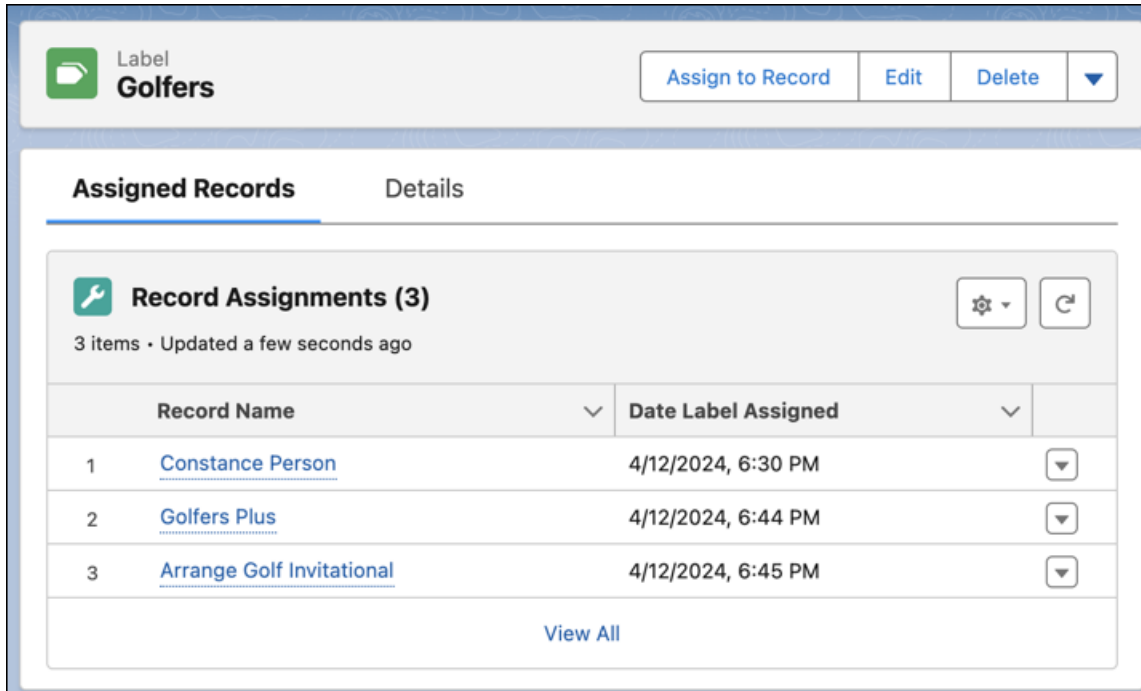
The screenshot shows the 'Labels' home page with the following details:
 

- Section: Labels Recently Viewed
- Count: 5 items • Updated a few seconds ago
- Search: Search this list...
- Buttons: New, Refresh, Filter

 The table below lists the labels:


|   | <input type="checkbox"/> Label Name             | Type          | Last Modified Date  |   |
|---|-------------------------------------------------|---------------|---------------------|---|
| 1 | <input type="checkbox"/> Golfers                | Record Label  | 4/12/2024, 6:30 PM  | ▼ |
| 2 | <input type="checkbox"/> Starred                | Starred Label | 10/31/2022, 1:56 PM | ▼ |
| 3 | <input type="checkbox"/> LinkedIn Cadences      | Record Label  | 4/12/2024, 6:31 PM  | ▼ |
| 4 | <input type="checkbox"/> Prospecting            | Record Label  | 4/12/2024, 6:31 PM  | ▼ |
| 5 | <input type="checkbox"/> H2 Conference Invitees | Record Label  | 4/12/2024, 6:30 PM  | ▼ |

On a label's record page, view the list of records with the label assigned.



Each user can create up to 20 labels per object and a total of up to 200 labels. Users can assign each label to up to 500 records. Record labels are separate from To Do List item labels, which are limited to 10 per user. Labels don't count against your organization's data storage limits.

The Label object can't be edited with the Object Manager. The page layout for label records also isn't editable.

 **Note:** Standard user profiles include access to the Label object. If you use custom profiles, ensure users continue to have access to To Do List labels and can begin using record labels by adding access to the Label object.

## Grant Access to the Label Object In Custom Profiles To Continue Using To Do List Labels (Release Update)

The Label object is now available in the API. This change supports the Record Labels feature in Sales Cloud. Standard profiles include access to the Label object automatically. If you use custom profiles, add access to the Label object to let users assign labels to records and continue using labels in the To Do List.

**Where:** This change applies to Lightning Experience in Enterprise, Professional, and Unlimited editions with Sales Cloud.

**How:** The Label object is available in user profiles. To let users assign labels to records and continue using labels in the To Do List, make sure all user profiles include access to the Label object.

- Your standard profiles include access to the Label object automatically.
- For any custom profiles, you must add access to the Label object manually.

For more information, see [Profiles](#) in Salesforce Help.

## See More Valuable Information in Seller Home

Seller Home now includes information about a user's best prospects, forecast commit, and Salesblazer articles. With a fuller view of their landscape, reps can pinpoint exactly where they need to start their day.

**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 now includes three updated cards.

- Top Prospects—When Prospecting Center is enabled via Data Cloud, this card shows the user's accounts with the top combined Fit and Engagement scores.
- Goals—This card now includes the user's forecast commit and a link to the related forecast. This card appears when Forecasting is enabled and the user has visited the Forecasts page.
- Salesblazer—Get expert advice from leaders in the sales community. This card links to the Salesblazer site for even more content.



## Save Time with More Actions in the Intelligence Views

Boost productivity with the power of standard and custom list view actions in the Account, Contact, and Lead Intelligence views. For example, send an email to an entire list of contacts; change ownership for multiple leads; or add a label to a group of accounts. Select up to 200 records and update them in bulk instead of one at a time. And, now you can update multiple records to the same value inline. We delivered this feature thanks to your ideas on IdeaExchange.

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

**How:** Standard and custom quick actions from the list view appear as buttons on the Intelligence view, with additional actions in a dropdown.

|   | Account Name                | Open Opportunities | Next Close Date | Type       | Last Activity | Owner Full Name       |
|---|-----------------------------|--------------------|-----------------|------------|---------------|-----------------------|
| 1 | Acacia LLC                  | JPY 940,669,000    | 12/25/2023      | Press      |               | Geoffrey P Amenhauser |
| 2 | Stjob Homes Bank            | JPY 11,695,180,000 | 12/15/2023      | Press      | 5/20/2025     | Geoff Luo             |
| 3 | Acacia Constant Corporation | JPY 816,298,000    | 1/27/2024       | Competitor |               | Donna L Westphal      |
| 4 | Abid Heisel                 | JPY 568,010,000    | 12/28/2023      |            |               | Carrie A Peele        |
| 5 | Abigail Coccozza            | JPY 1,252,083,000  | 1/29/2024       |            |               | Paul A Sayad          |
| 6 | Ac Jenne                    | JPY 0              |                 |            |               | Thoma Pradat          |
| 7 | Acacia CYREN                | JPY 1,596,259,500  | 4/12/2024       |            |               | Paul A Sayad          |
| 8 | Acadia Mecox                | JPY 2,332,415,500  | 12/24/2023      | Partner    | 4/14/2025     | Kevan Parlee          |
| 9 | Acadia Sequential LLC       | JPY 10,873,044,500 | 12/23/2023      | Partner    | 9/21/2024     | Zorana Burriesci      |

To mass update records, select one or more records from the table (1), and then apply the action (2). To update multiple records inline, first select one or more records from the table. Then hover over a field. Similar to other list views, a pencil appears if the field is editable. Select the pencil icon, then the checkbox indicating you want to update multiple items, and apply your changes (3).

SEE ALSO:

[Salesforce Help: Mass Quick Actions \(can be outdated or unavailable during release preview\)](#)

## Einstein Conversation Insights

Create custom insights powered by generative AI with Generative Conversation Insights. Einstein Conversation Insights can now process single-user meetings. Users can also easily expand edit access to record collections, and we've rolled out more dashboard improvements.

### IN THIS SECTION:

#### [Configure Custom Insights with Generative Conversation Insights](#)

Use Generative Conversation Insights to answer any questions you have about your teams' sales calls. Define prompts that query a large language model (LLM) with the transcript of the call, and show relevant insights on the call record. Using generative AI, get answers to things such as customer sentiment or deal terms surfaced for sales conversations automatically.

#### [Use Einstein Conversation Insights with Single User Meetings](#)

Do you want to get transcripts, insights, and coaching for your sales pitches and other preparatory meetings? Einstein Conversation Insights now supports processing for meetings that include only one user.

#### [Share Edit Access for Record Collections with Other Users](#)

Need a colleague's help creating a collection of all-time-best sales calls for new sales reps? It's now easier to update collections with others. You can share write permissions for record collections with different users or groups.

#### [Access More Dashboard Improvements](#)

Enhanced dashboard features are available to Einstein Conversation Insights (ECI) users, including new pages for Coaching and Related Record Calls.

## Configure Custom Insights with Generative Conversation Insights

Use Generative Conversation Insights to answer any questions you have about your teams' sales calls. Define prompts that query a large language model (LLM) with the transcript of the call, and show relevant insights on the call record. Using generative AI, get answers to things such as customer sentiment or deal terms surfaced for sales conversations automatically.

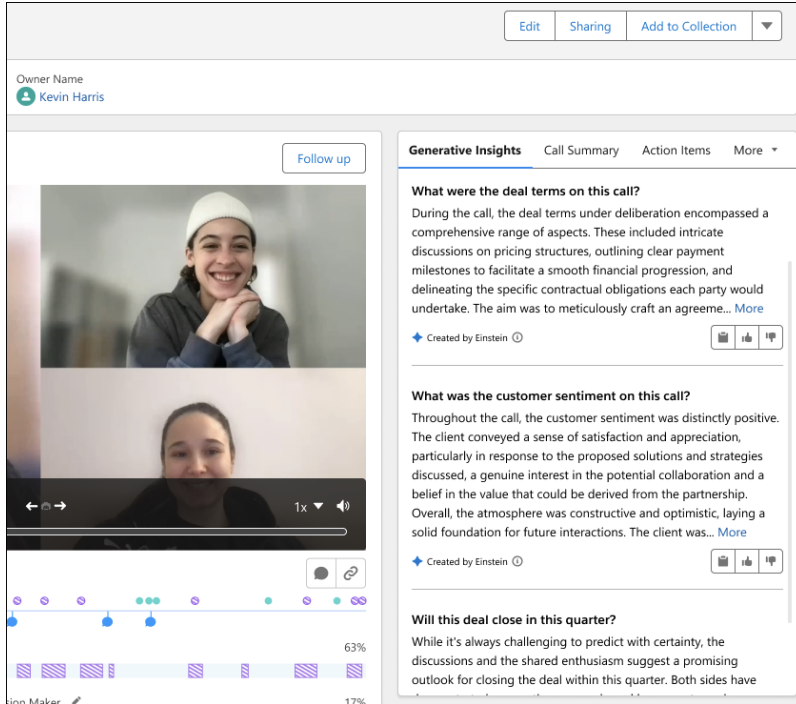
**Where:** This feature requires Einstein Conversation Insights and Einstein for Sales, and is available in Lightning Experience in Enterprise, Performance, and Unlimited editions. Einstein generative AI is available in Lightning Experience.

To purchase Einstein for Sales, contact your Salesforce account executive.

**Who:** This feature applies to all video calls recorded by users with the Einstein Sales Generative Insights permission set.

Users without the permission set can see generative insights for calls they have access to, but their video calls aren't processed for generative insights.

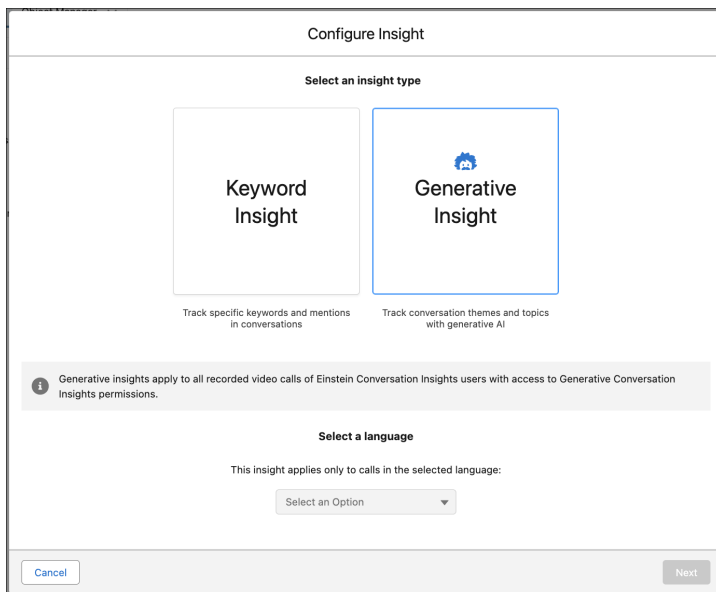
**How:** To bring up Generative Conversation Insights, select the tab. See the insights available on each call.



Turn on the feature from the Einstein for Sales page in Setup.

To create a generative insight, from Setup, in the Quick Find box, enter *Call Insights*, and then select **Call Insights**.

Select **Configure Insight**, and then click **Generative Insight** and follow the steps listed.



We recommend testing each insight in Call Explorer before activation. You're limited to 5 active generative insights.

SEE ALSO:

[Einstein Features](#)

## Use Einstein Conversation Insights with Single User Meetings

Do you want to get transcripts, insights, and coaching for your sales pitches and other preparatory meetings? Einstein Conversation Insights now supports processing for meetings that include only one user.

**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:** Single-user meetings are now processed automatically. After you record a solo video meeting, it's processed like any other external call.

## Share Edit Access for Record Collections with Other Users

Need a colleague's help creating a collection of all-time-best sales calls for new sales reps? It's now easier to update collections with others. You can share write permissions for record collections with different users or groups.

**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 share record collections. Select the collection record, click **Share Collection**, and the Read/Write option is now available to share with groups or individual users.

Users with Read/Write permission can add or remove records from collections, and also share access with others.

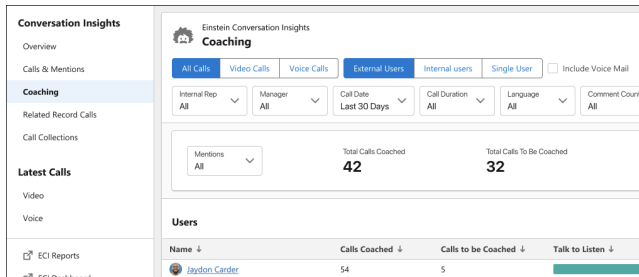
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Enhanced dashboard features are available to Einstein Conversation Insights (ECI) users, including new pages for Coaching and Related Record Calls.

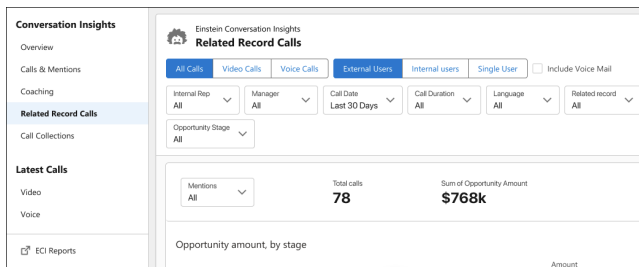
**Where:** This change applies to Einstein Conversation Insights in Lightning Experience. Einstein Conversation Insights is available in Enterprise, Performance, and Unlimited editions, and as an add-on in Enterprise Edition for more than 10 users.

**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. New pages are available for Coaching and Related Record Calls with additional filters and reports on each page.



Users can see whether calls have been coached or not based on whether they include comments.



It's also easy to find calls based on related records.

## Sales Engagement

Link cadences, use screen flows as cadence steps, save cadences in any folder, and create and edit email templates in Cadence Builder 2.0. Prepare for Cadence Builder Classic retirement.

For pricing details, contact your Salesforce account executive. Sales Dialer is also available for an extra cost as an add-on license.

### IN THIS SECTION:

#### [Use Screen Flows as Cadence Steps in Cadence Builder 2.0](#)

Now sales managers can specify a screen flow as a cadence step in Cadence Builder 2.0. Use screen flow steps to let reps create a case, event, or task or to perform another action. The screen flow runs when the sales rep initiates the step for a target from their To Do List, Work Queue, or the Sales Engagement component on target records. Use the Cadence Step Flow process type to create screen flows for cadence steps, or use the included flow templates.

#### [Create More Customized Sales Playbooks in Cadence Builder 2.0](#)

Sales managers can create more flexible sales outreach playbooks by linking multiple cadences together in Cadence Builder 2.0. When prospects go through one cadence, they're automatically added to the next one. Sales managers can design one cadence for hot leads and connect it to a cadence for leads that don't convert during the first one.

#### [Save Time by Creating Email Templates with Cadences](#)

When users create a cadence, they can now create, view, or edit an email template directly from within the email step card in Cadence Builder 2.0. Previously, users had to create email templates before adding them to a cadence.

#### [Easily Organize Cadence Builder 2.0 Cadences](#)

Cadence creators can now organize their cadences in the way that makes the most sense for their team. Save Cadence Builder 2.0 cadences to any public or private folder.



### Cadence Builder Classic Is Being Retired

In Summer '25, Salesforce is retiring Cadence Builder Classic (1.0) within the Sales Engagement product. Cadence Builder Classic uses an older structure to allow responsiveness to target engagements. Cadence Builder 2.0 replaces that structure with a simpler one.

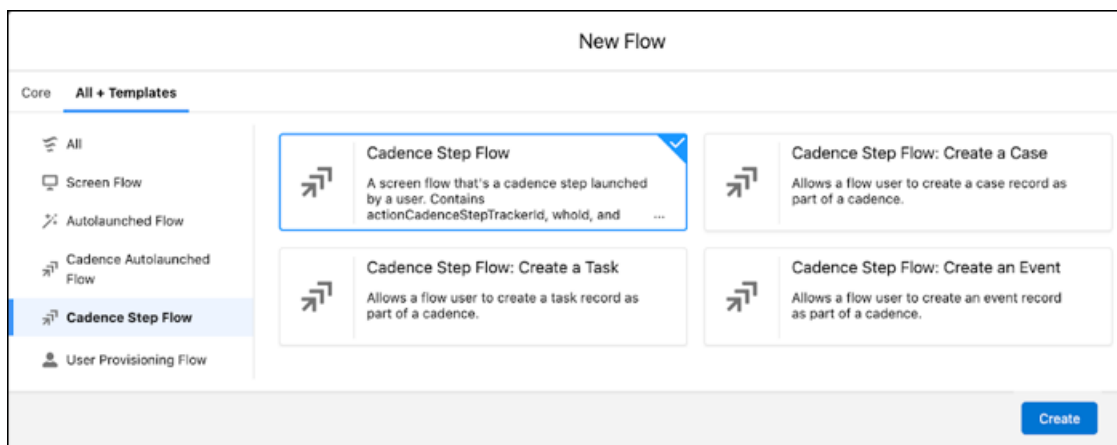
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Now sales managers can specify a screen flow as a cadence step in Cadence Builder 2.0. Use screen flow steps to let reps create a case, event, or task or to perform another action. The screen flow runs when the sales rep initiates the step for a target from their To Do List, Work Queue, or the Sales Engagement component on target records. Use the Cadence Step Flow process type to create screen flows for cadence steps, or use the included flow templates.

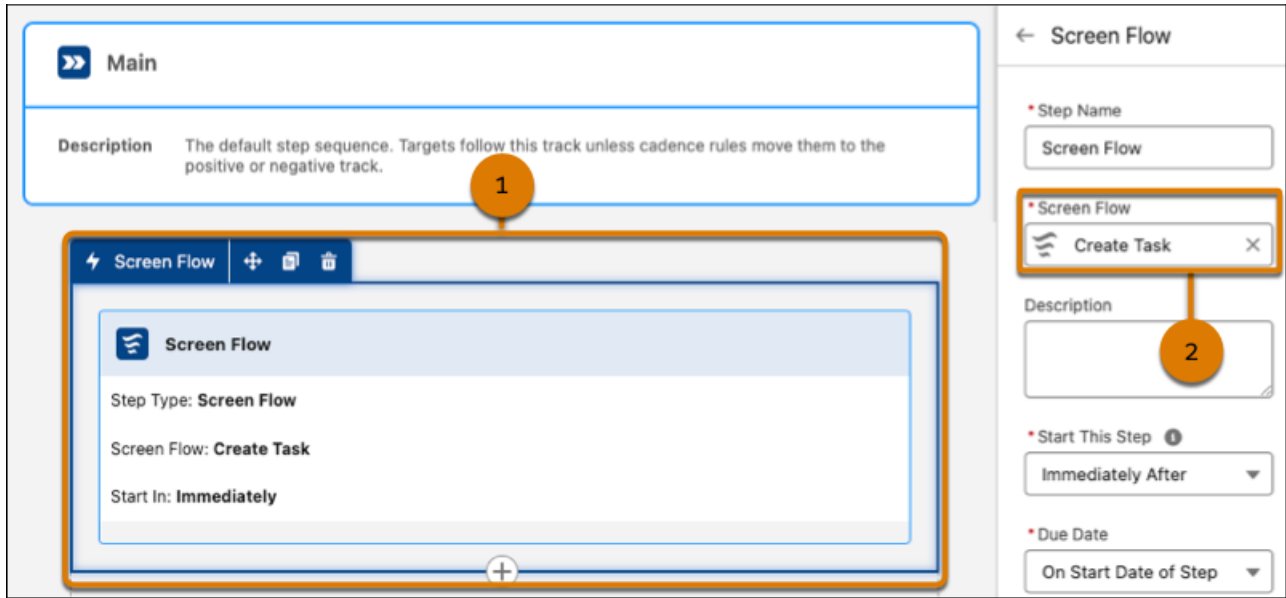
**Where:** This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions with Sales Cloud.

**How:** In the Flow Builder, create a screen flow from the Cadence Step Flow process type. Three flow templates are included with Sales Engagement. Flow templates must be activated before being cloned.

- Create a Case
- Create an Event
- Create a Task



Then add a screen flow step in Cadence Builder 2.0 (1) and choose a screen flow (2).

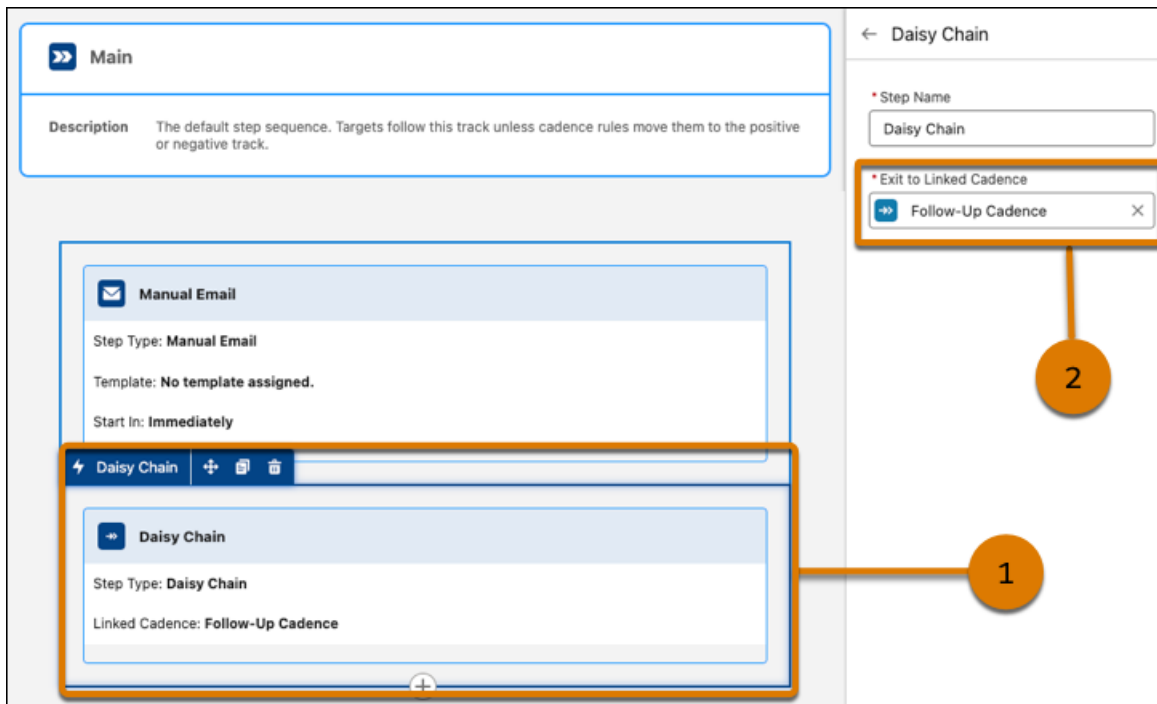


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Sales managers can create more flexible sales outreach playbooks by linking multiple cadences together in Cadence Builder 2.0. When prospects go through one cadence, they're automatically added to the next one. Sales managers can design one cadence for hot leads and connect it to a cadence for leads that don't convert during the first one.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions with Sales Cloud.

**How:** To send targets from one cadence to another, add a Cadence Link as the last step of the first cadence (1). Then choose the linked cadence (2).



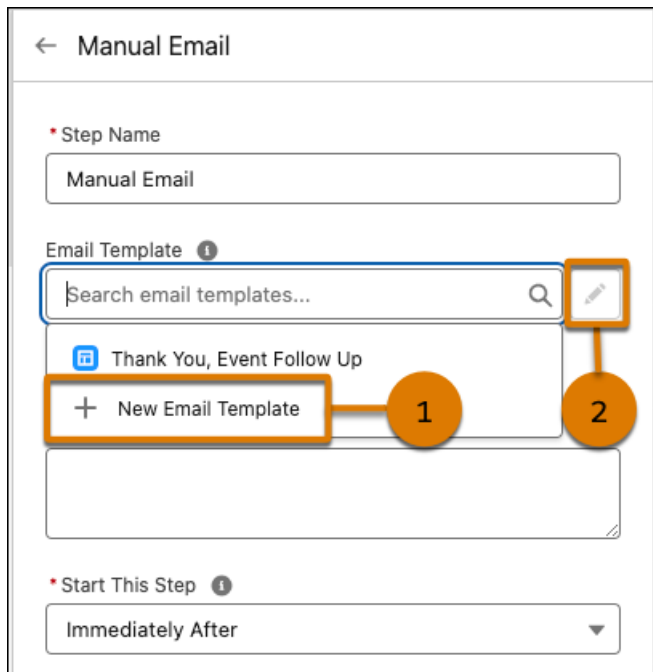
## Save Time by Creating Email Templates with Cadences

When users create a cadence, they can now create, view, or edit an email template directly from within the email step card in Cadence Builder 2.0. Previously, users had to create email templates before adding them to a cadence.

**Where:** This change applies to Lightning Experience in Enterprise and Professional editions with the Sales Cloud.

**Who:** Cadences are available to users with the Sales Engagement Cadence Creator or Sales Engagement Cadence Creator Included permission.

**How:** Users can choose to create an email template right from the dropdown list (1). Edit a selected template by clicking the pencil icon (2).



## Easily Organize Cadence Builder 2.0 Cadences

Cadence creators can now organize their cadences in the way that makes the most sense for their team. Save Cadence Builder 2.0 cadences to any public or private folder.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions with Sales Cloud.

## Cadence Builder Classic Is Being Retired

In Summer '25, Salesforce is retiring Cadence Builder Classic (1.0) within the Sales Engagement product. Cadence Builder Classic uses an older structure to allow responsiveness to target engagements. Cadence Builder 2.0 replaces that structure with a simpler one.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions with Sales Cloud.

**Why:** Start using Cadence Builder 2.0 now. The new builder is available beginning with Spring '24. It uses a set of three separate tracks—Main, Positive, and Negative—rather than branches to allow for responsiveness to target engagement. The three-track design enables faster and simpler cadence building.

Keep these dates in mind.

- Beginning in Spring '25, Cadence Builder Classic can only edit existing Classic cadences. Users can no longer create or clone Classic cadences.

- In Summer '25 Cadence Builder Classic will be retired. Users won't be able to access Cadence Builder Classic and sales reps won't be able to use cadences created in Cadence Builder Classic. Users will only be able to work with Cadence Builder 2.0 cadences.

Rebuild your branched cadences in Cadence Builder 2.0 before Summer '25. See [Build Cadences with Cadence Builder 2.0](#).

## Revenue Intelligence

Nurture relationships with stakeholders and identify opportunities to expand markets with lead metrics in the Einstein Account Management Account Inspector. Update your revenue data more frequently with the new hourly app refresh schedule. Explore all the Revenue Insights resources after a successful app installation using the Resources tab.

### IN THIS SECTION:

#### [Navigate Revenue Insights Dashboards More Easily](#)

Move quickly between your dashboards and insights with tabs across the top of your Revenue Insights app. You can also pin your preferred dashboard so that it opens automatically.

#### [Use Custom Fiscal Forecasts in Revenue Insights](#)

If your forecast types are configured with custom fiscal quarters or periods, you can now use them in Revenue Insights. For example, you can look at the total amount of closed won opportunities for the custom fiscal period defined for your group.

#### [Increase Your Deal Potential with Lead Data in Einstein Account Management](#)

Nurture relationships with stakeholders and identify opportunities to expand markets with lead metrics. Now, you can see lead metrics in the Einstein Account Management Account Inspector. You can see details such as the breakdown of leads by industry, source, or status. And you can see the conversion rate for leads and drill down into lead details.

#### [Access Your Revenue Insights Resources in One Place](#)

Explore Revenue Insights resources after a successful app installation. These resources consist of insights and assets, including dashboards, components, and Einstein Studio models. View data assets such as datasets and data model objects, and see transformations including recipes and batch data transforms.

#### [Get Your Revenue Data Even Faster](#)

Update your revenue data more frequently with the new hourly app refresh schedule option.

#### [Monitor Your Revenue Insights Installations and Upgrades](#)

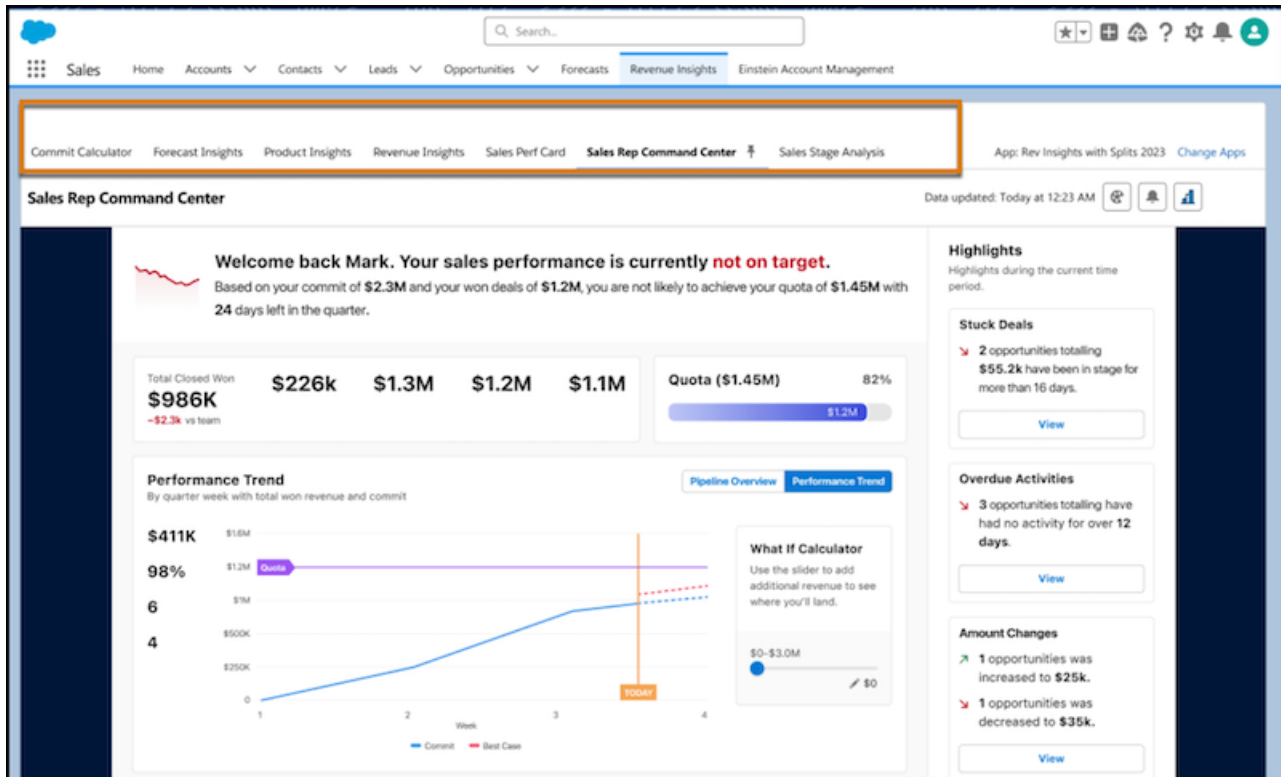
When Revenue Insights is installed or upgraded, the process progress displays the elapsed time.

## Navigate Revenue Insights Dashboards More Easily

Move quickly between your dashboards and insights with tabs across the top of your Revenue Insights app. You can also pin your preferred dashboard so that it opens automatically.

**Where:** This change applies to Sales Cloud in Lightning Experience in Enterprise and Unlimited editions for an additional cost.

**How:** From the Sales app navigation bar, find Revenue insights, and open it. View your dashboards and insights tabs across the top of the screen.



## Use Custom Fiscal Forecasts in Revenue Insights

If your forecast types are configured with custom fiscal quarters or periods, you can now use them in Revenue Insights. For example, you can look at the total amount of closed won opportunities for the custom fiscal period defined for your group.

**Where:** This change applies to Sales Cloud in Lightning Experience in Enterprise and Unlimited editions for an additional cost.

**How:** To use this feature, enable custom fiscal year usage in Data Prep. From Analytics Object Manager, go to Data Prep Settings, and click **Enable Date Settings**.

## Increase Your Deal Potential with Lead Data in Einstein Account Management

Nurture relationships with stakeholders and identify opportunities to expand markets with lead metrics. Now, you can see lead metrics in the Einstein Account Management Account Inspector. You can see details such as the breakdown of leads by industry, source, or status. And you can see the conversion rate for leads and drill down into lead details.

**Where:** This change applies to Sales Cloud in Lightning Experience in Enterprise and Unlimited editions for an additional cost.

**How:** From the Sales app navigation bar, find Einstein Account Management and open the Account Inspector. Find the Lead metrics card by navigating the carousel.

The screenshot displays the Einstein 1 Sales interface. At the top, there are navigation tabs: Home, Leads, Accounts, Einstein Account Management, Revenue Insights, Contacts, Opportunities, and Conversation Insights. Below the navigation, there are three main sections: 'Most at Risk' (64 accounts), 'Where to Sell' (39 accounts), and 'All Accounts' (80 accounts). The main content area is divided into two parts. On the left is a table of accounts with columns for Account Name, Health Score, Upside Score, Win Rate, Avg Deal Size, YTD Spend, Pipeline, and Activity Engagement. On the right is a detailed view for '24-7 Financial.com', which includes account information (Enterprise in Education, Account Owner: Bill South, Tenure: 11 Months, Employees: 191), lead metrics (Total Leads: 261, Conversion Rate: 9%), and a lead breakdown chart showing sources like Social Media (7), Cold Call (6), Marketing Event (5), and Website (5).

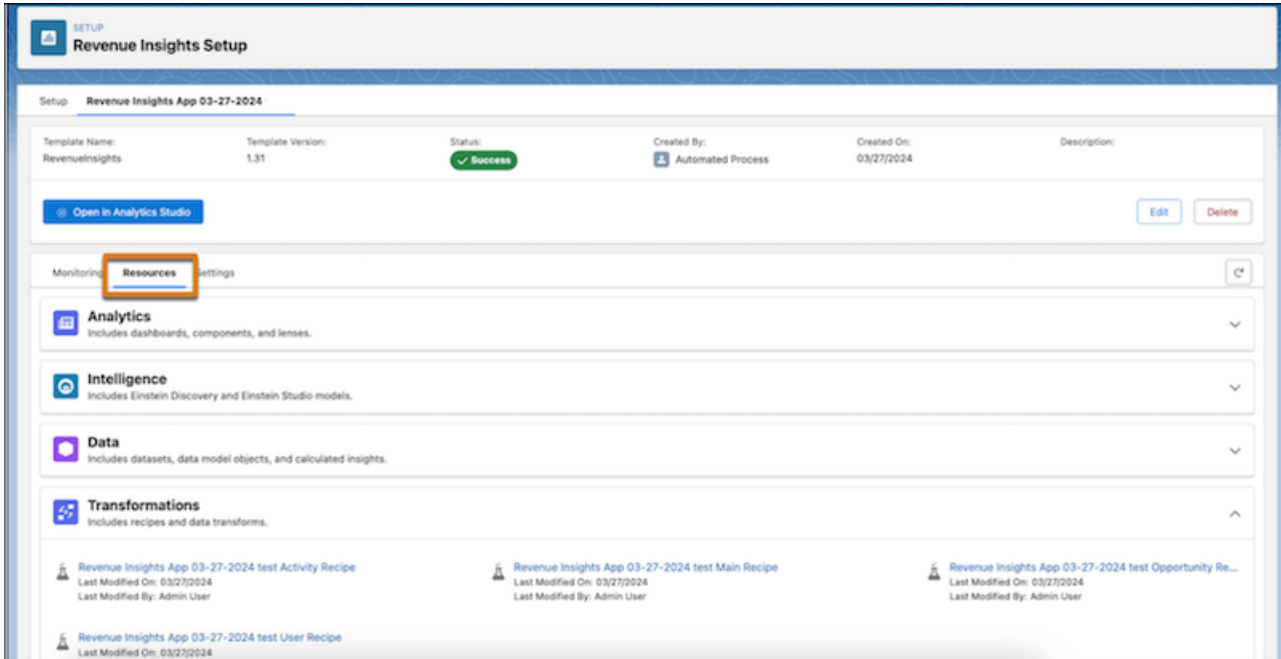
| Account Name                           | Health Score | Upside Score | Win Rate      | Avg Deal Size      | YTD Spend          | Pipeline          | Activity Engagement              |
|----------------------------------------|--------------|--------------|---------------|--------------------|--------------------|-------------------|----------------------------------|
| 24-7 Financial.com                     | 4            | 31           | 12%<br>-79% ↓ | \$150.5k<br>51% ↑  | \$1.9m<br>83% ↑    | \$8.1k<br>11% ↑   | Medium<br>Next activity: 41 days |
| A.I.S.G.                               | 19           | 36           | 75%<br>36% ↑  | \$132.0k<br>65% ↑  | \$625.0k<br>-17% ↓ | \$8.9k<br>53% ↑   | Medium<br>Next activity: 59 days |
| ACCELA.COM                             | 80           | 60           | 75%<br>42% ↑  | \$119.5k<br>166% ↑ | \$450.0k<br>-53% ↓ | \$5.5k<br>260% ↑  | Medium<br>Next activity: 37 days |
| AJC Corporation                        | 194          | 184          | 20%<br>-83% ↓ | \$240.0k<br>90% ↑  | \$1.2m<br>67% ↑    | \$19.1k<br>320% ↑ | Medium<br>Next activity: 64 days |
| ATL Technology                         | 68           | 9            | 72%<br>30% ↑  | \$137.0k<br>204% ↑ | \$350.0k<br>-63% ↓ | \$11.8k<br>110% ↑ | Medium<br>Next activity: 44 days |
| ATS Medical                            | 49           | 3            | 20%<br>-66% ↓ | \$162.5k<br>63% ↑  | \$500.0k<br>-51% ↓ | \$8.7k<br>-54% ↓  | Low<br>Next activity: 32 days    |
| AUTOSPORT USA                          | 99           | 84           | 48%<br>-17% ↓ | \$161.5k<br>62% ↑  | \$600.0k<br>-41% ↓ | \$12.5k<br>-11% ↓ | Medium<br>Next activity: 41 days |
| Abilizer Solutions Inc                 | 95           | 1            | 80%<br>30% ↑  | \$169.0k<br>168% ↑ | \$275.0k<br>-20% ↓ | \$9.7k<br>540% ↑  | Medium<br>Next activity: 59 days |
| Accusage, Inc.                         | 80           | 54           | 66%<br>-38% ↓ | \$297.0k<br>230% ↑ | \$1.4m<br>-30% ↓   | \$23.8k<br>200% ↑ | Medium<br>Next activity: 122     |
| Advanced Communications                | 126          | 8            | 96%<br>2% ↑   | \$387.0k<br>65% ↑  | \$1.4m<br>-39% ↓   | \$20.9k<br>-18% ↓ | Low<br>Next activity: 132        |
| Aerospan.com                           | 33           | 18           | 8%<br>-83% ↓  | \$187.5k<br>60% ↑  | \$1.3m<br>13% ↑    | \$12.1k<br>10% ↑  | Low<br>Next activity: 52 days    |
| Affiliated Foods Midwest               | 95           | 64           | 75%<br>29% ↑  | \$76.5k<br>-23% ↓  | \$1.9m<br>83% ↑    | \$10.5k<br>65% ↑  | Medium<br>Next activity: 36 days |
| Alchemedia                             | 99           | 79           | 95%<br>79% ↑  | \$110.5k<br>146% ↑ | \$1.3m<br>36% ↑    | \$9.8k<br>24% ↑   | Medium<br>Next activity: 45 days |
| American Environmental Container Corp. | 98           | 78           | 77%<br>40% ↑  | \$58.0k<br>-28% ↓  | \$450.0k<br>-40% ↓ | \$7.9k<br>-32% ↓  | Medium<br>Next activity: 25 days |

## Access Your Revenue Insights Resources in One Place

Explore Revenue Insights resources after a successful app installation. These resources consist of insights and assets, including dashboards, components, and Einstein Studio models. View data assets such as datasets and data model objects, and see transformations including recipes and batch data transforms.

**Where:** This change applies to Sales Cloud in Lightning Experience in Enterprise and Unlimited editions for an additional cost.

**How:** In Revenue Insights setup, installed versions of Revenue Intelligence are listed. Select a version and use the Resources tab to view all the assets. Click an asset to open it in its respective tool.

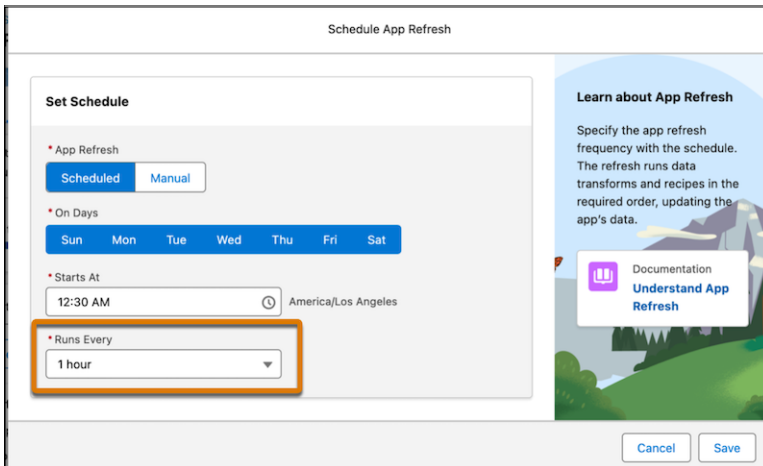


## Get Your Revenue Data Even Faster

Update your revenue data more frequently with the new hourly app refresh schedule option.

**Where:** This change applies to Sales Cloud in Lightning Experience in Enterprise and Unlimited editions for an additional cost.

**How:** In Revenue Insights setup, installed versions of Revenue Intelligence are listed. View details and update scheduled app refreshes on the Settings tab.

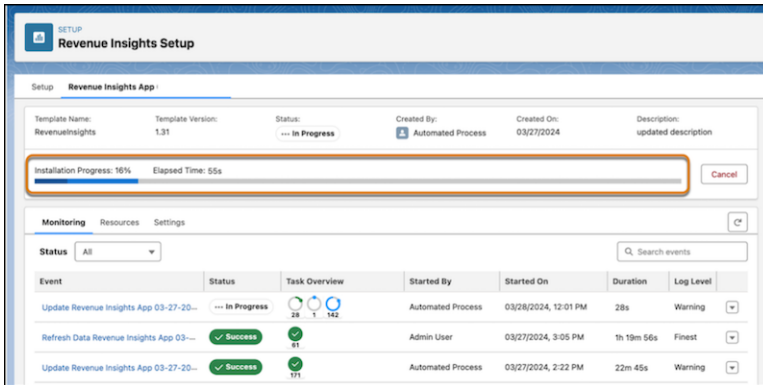


## Monitor Your Revenue Insights Installations and Upgrades

When Revenue Insights is installed or upgraded, the process progress displays the elapsed time.

**Where:** This change applies to Sales Cloud in Lightning Experience in Enterprise and Unlimited editions for an additional cost.

**How:** In Revenue Insights setup, installed versions of Revenue Intelligence are listed. View the installation progress on the app tab.



## Collaborative Forecasts

Sales managers can choose to review forecast rollups by team, then by forecast group or product family, or by group or product family, then by team.

### IN THIS SECTION:

#### [View Forecasts Grouped How It Makes Sense to You](#)

Review forecast rollups by team, forecast group, or product family on the forecasts page. For user role hierarchy forecast types that include groups or product families, Sales Managers can select to view forecasts rolled up by team, then by product family or group. Or, they can select to view forecasts rolled up by group values or product family, then by team.

#### [Further Customize the Forecast Guidance You Receive in Copilot](#)

The Get Forecast Guidance copilot action is now powered by a flow that customers can modify to better define copilot's response around forecasting. In Flow Builder, modify risk criteria, the number of opportunities to display, gap-to-quota formulas, and other elements to get the most out of forecast guidance in copilot.

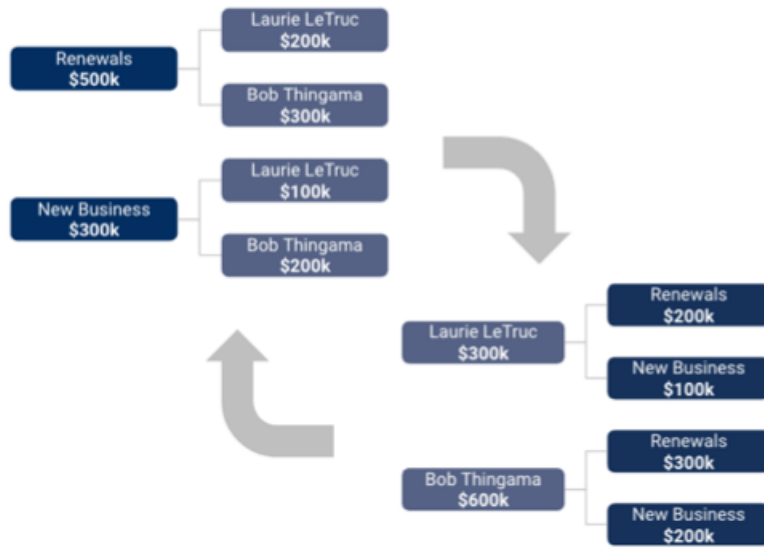
## View Forecasts Grouped How It Makes Sense to You

Review forecast rollups by team, forecast group, or product family on the forecasts page. For user role hierarchy forecast types that include groups or product families, Sales Managers can select to view forecasts rolled up by team, then by product family or group. Or, they can select to view forecasts rolled up by group values or product family, then by team.

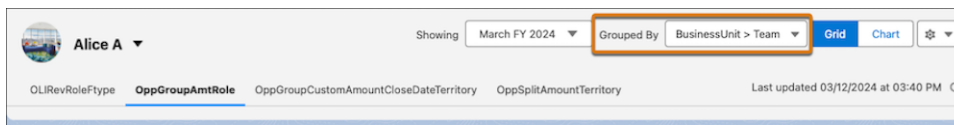
**When:** This change applies to Lightning Experience in Professional and Developer editions and in Enterprise and Unlimited editions with the Sales Cloud.

**Why:** To make comparisons while reviewing forecasts, Sales Managers review the sales performance of their direct reports and the forecasts rolled up to different business segments.





**How:** On the forecasts page, select a forecast type that uses a custom picklist to group values or is grouped using product families. Then, in the Grouped By field in the forecast header, select how to group the rollup values.



SEE ALSO:

[Salesforce Help: Group Sales Forecasts to Match Your Business \(can be outdated or unavailable during release preview\)](#)

## Further Customize the Forecast Guidance You Receive in Copilot

The Get Forecast Guidance copilot action is now powered by a flow that customers can modify to better define copilot's response around forecasting. In Flow Builder, modify risk criteria, the number of opportunities to display, gap-to-quota formulas, and other elements to get the most out of forecast guidance in copilot.

**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.

**When:** This change is available in early July.

**Who:** Get Forecast Guidance is available to users with the Run Flow user permission. Users also need the Use Einstein Copilot for Salesforce user permission to access Copilot. Customization of the flow is available to users with the Manage Flow user permission.

**How:** Open the Get Forecast Guidance Flow in Flow Builder and edit the Constants throughout the flow.

SEE ALSO:

[Defining the Forecast Guidance You Receive in Copilot](#)

## Pipeline Inspection

Boost productivity with the power of standard and custom list view actions in Pipeline Inspection. Get insight into potentially risky contacts on a deal.

### IN THIS SECTION:

#### [Save Time with More Actions in Pipeline Inspection](#)

Boost productivity with the power of standard and custom list view actions in Pipeline Inspection. You can update the close date of multiple deals, add opportunity products to opportunities, or even create quotes, without leaving the Pipeline Inspection view. Select up to 200 records and update them in bulk instead of one at a time. And, now you can update multiple records to the same value inline.

#### [Identify Potentially Risky Contacts on Deals](#)

With a new insight in Pipeline Inspection, sales reps can now learn whether a contact is a detractor on one of their deals. To see the detractor's relationships with other contacts on the deal, reps can view the Buyer Relationship Map directly from the insight.

## Save Time with More Actions in Pipeline Inspection

Boost productivity with the power of standard and custom list view actions in Pipeline Inspection. You can update the close date of multiple deals, add opportunity products to opportunities, or even create quotes, without leaving the Pipeline Inspection view. Select up to 200 records and update them in bulk instead of one at a time. And, now you can update multiple records to the same value inline.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions with Sales Cloud.

**How:** Standard and custom quick actions from the list view appear as buttons on Pipeline Inspection, with additional actions in a dropdown.

The screenshot displays the Salesforce Pipeline Inspection interface. At the top, there's a header with 'Opportunities' and 'My Team's Opportunities'. Below this is a navigation bar with 'Inspection' and 'Chart' tabs. A summary bar shows various pipeline metrics: Open Pipeline (¥20B), New (¥0), Won (¥1.5B), Increased (¥0), Moved In (¥25B), Moved Out (-), Decreased (¥0), Lost (¥3.3B), and Overdue (-). The main table lists 8 opportunities with columns for Opportunity Name, Account Name, Amount, Close Date, Stage, Recent Activ..., and Forecast Category. Three items are selected, indicated by checkboxes and a '3 items selected' label. A modal window is open over the table, showing a date picker set to 3/28/2024 and a checkbox for 'Update 3 selected items'. The modal has 'Cancel' and 'Apply' buttons. A red circle '1' points to the 'Opportunity Name' column header, a red circle '2' points to the 'Forecast Category' column header, and a red circle '3' points to the 'Close Date' column header.

| Opportunity Name                                  | Account Name                                | Amount                             | Close Date | Stage                | Recent Activ... | Forecast Category |
|---------------------------------------------------|---------------------------------------------|------------------------------------|------------|----------------------|-----------------|-------------------|
| 1 [x] <a href="#">Astra Fortis</a>                | <a href="#">Axiom PSB</a>                   | USD 88,219.38 (JPY 44,109,690)     | 3/26/2024  | Perception Analysis  | None            | Commit            |
| 2 [x] <a href="#">TECNB PM LLC</a>                | <a href="#">Microelectronics Elmira LLC</a> | USD 27,136.58 (JPY 13,568,290)     |            |                      | None            | Commit            |
| 3 [ ] <a href="#">Altra Exa Inc.</a>              | <a href="#">Ku6 Optimum Inc.</a>            | USD 68,724.89 (JPY 34,362,445)     |            |                      | None            | Pipeline          |
| 4 [x] <a href="#">Stampscom Collectors</a>        | <a href="#">Sfa Health Inc.</a>             | USD 1,769,883.00 (JPY 884,941,500) |            |                      | None            | Pipeline          |
| 5 [ ] <a href="#">orate ManTech</a>               | <a href="#">API MWI LLC</a>                 | USD 73,440.24 (JPY 36,720,120)     |            |                      | None            | Most Likely       |
| 6 [ ] <a href="#">Diamondback Lionbridge L...</a> | <a href="#">Papa Garrison Inc.</a>          | USD 34,678.75 (JPY 17,339,375)     | 3/29/2024  | Prospecting          | In 75 days      | Pipeline          |
| 7 [ ] <a href="#">Research Aerospace Inc.</a>     | <a href="#">Demestic Reinert</a>            | USD -87,930.50 (JPY -43,965,249)   | 3/26/2024  | Proposal/Price Quote | None            | Best Case         |
| 8 [ ] <a href="#">Rambus Innophos</a>             | <a href="#">FirstMerit U Solutions</a>      | USD 23,681.56 (JPY 11,840,780)     | 3/26/2024  | Prospecting          | None            | Pipeline          |

To mass update opportunities, select one or more records from the table (1), and then apply the action (2). To update multiple records inline, first select one or more records from the table. You can edit any field that shows a pencil icon when you hover. Select the pencil icon, then the checkbox indicating you want to update multiple items, and apply your changes (3).

SEE ALSO:

[Salesforce Help: Mass Quick Actions \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Guidelines and Limits for Pipeline Inspection \(can be outdated or unavailable during release preview\)](#)

## Identify Potentially Risky Contacts on Deals

With a new insight in Pipeline Inspection, sales reps can now learn whether a contact is a detractor on one of their deals. To see the detractor's relationships with other contacts on the deal, reps can view the Buyer Relationship Map directly from the insight.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Einstein 1 Sales Edition editions with Sales Cloud and with Buyer Relationship Map enabled.

**How:** The contact detractor insight is shown in the Pipeline Inspection side panel when it's found for an opportunity that has a Buyer Relationship Map created.

SEE ALSO:

[Visualize Key Contacts on the Buyer Relationship Map](#)

## Sales Programs and Partner Tracks with Enablement

Elevate the performance, confidence, and impact of your sales team and drive business growth with a community of informed and engaged partners. Give sales reps immediate, actionable feedback on their sales pitches, courtesy of Einstein, all in their flow of work. Create programs that align with your most complex revenue metrics, and provide more transparency and accountability to users who take your programs. Integrate the governance of your Enablement rollout with other Salesforce systems and processes.

IN THIS SECTION:

[Provide Users with Coaching-Inspired Feedback Driven by Einstein Generative AI](#)

Give sales reps private, personal, and timely coaching so they can excel in their roles without adding to a peer or manager's workload. With Einstein Coach in Enablement programs, Enablement admins can create Feedback Request exercises where Enablement users receive AI-generated coaching on their sales pitch in their flow of work. Einstein analyzes how reps introduce themselves, set context, articulate the value and benefit of the product or solution, define a business solution, make compelling points, use storytelling, and deliver complex information.

[Make Your Enablement Goals More Effective with Advanced Milestone Options](#)

Build more powerful milestones and outcomes related to your company's revenue goals, with no customization required. With new composite goals, your company can more easily integrate complex but critical metrics that require evaluating multiple objects. Associate two measures with a milestone or outcome and specify a calculation logic to aggregate the measure results. The aggregated measure result is compared against the target to track users' progress toward a goal. For example, count the total number of activities such as calls and emails, which track separate objects, on the same milestone. Previously, milestones or outcomes could reference only one measure, and more complicated use cases required customization such as custom objects or fields.

### [Get Transparency on Your Goal Progress with Itemized Progress Details](#)

Enablement users can now gain deeper insights on their progress toward an outcome or a milestone with display of the data being measured. The qualifying records tables in the Guidance Center and in supported Experience Cloud site pages show individual records that contribute to a goal completion. Users can analyze the qualifying records to validate their progress toward a goal and take strategic decisions to complete the program.

### [Help Users Discover and Complete Enablement Program Goals on Time](#)

Encourage discovery, adoption, and completion of your company's sales programs in Lightning Experience or partner programs in Experience Cloud sites. Provide accountability and transparency for users who contribute to your revenue outcomes by keeping them informed about upcoming due dates for programs, outcomes, and milestones. Help users stay focused by minimizing the noise and turning on only the notifications that make sense for your company and fine-tuning when those notifications are sent.

### [Develop, Test, and Deploy Enablement Programs and Measures More Easily](#)

Elevate your Enablement rollout strategy by integrating programs and measures with other sophisticated enterprise operations in your Salesforce implementation. After you develop and test Enablement programs and measures in a sandbox, easily deploy them to production with Metadata API for change sets and Salesforce CLI. Previously, Enablement admins could develop and test programs and measures in a sandbox but couldn't move them to production.

### [Tailor Your Enablement Programs to Your Company's Preferred Content System - Developer Preview](#)

Provide a more streamlined connection between your company's preferred content management system and your Enablement programs. Create custom exercise types that reference content from your own repository or a third-party repository. With custom exercise types, you can easily bring content from anywhere into your program. Previously, exercise types in Enablement programs supported content only from Salesforce systems, including Digital Experiences content, Trailhead, and Assessment surveys. Your sales reps can view custom exercise content in the flow of a program without navigating to a different page.

### [Other Changes in Enablement](#)

Salesforce admins, Enablement teams, and content creators benefit from other enhancements throughout the Enablement workflow.

## Provide Users with Coaching-Inspired Feedback Driven by Einstein Generative AI

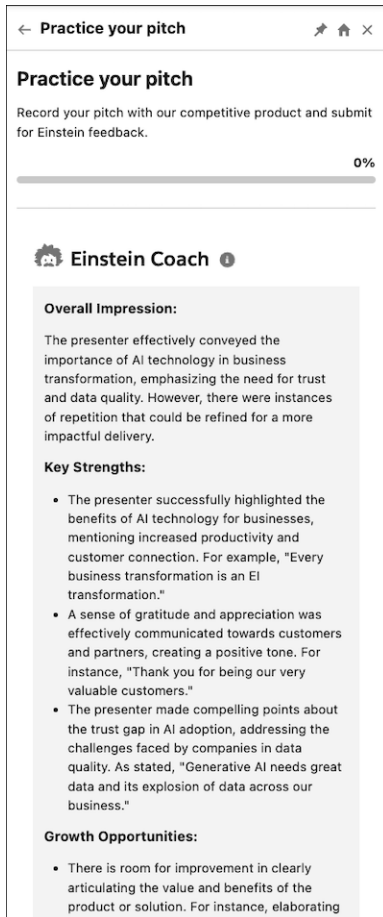
Give sales reps private, personal, and timely coaching so they can excel in their roles without adding to a peer or manager's workload. With Einstein Coach in Enablement programs, Enablement admins can create Feedback Request exercises where Enablement users receive AI-generated coaching on their sales pitch in their flow of work. Einstein analyzes how reps introduce themselves, set context, articulate the value and benefit of the product or solution, define a business solution, make compelling points, use storytelling, and deliver complex information.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions. Einstein generative AI is available in Lightning Experience. An Einstein for Sales license and Enablement add-on license are required.

**Who:** Enablement admins and users with the Use Einstein Coach permission can access AI-generated feedback for Feedback Request exercises. This permission is enabled by default in the Access Einstein Coach default permission set.

**How:** Turn on Einstein Coach in the Einstein for Sales setup page.

Generated feedback appears in the Guidance Center when users complete a Feedback Request exercise that uses Einstein Coach.

**SEE ALSO:**

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

[Salesforce Help: Managing Einstein Coach for Feedback Request Exercises \(can be outdated or unavailable during release preview\)](#)

## Make Your Enablement Goals More Effective with Advanced Milestone Options

Build more powerful milestones and outcomes related to your company's revenue goals, with no customization required. With new composite goals, your company can more easily integrate complex but critical metrics that require evaluating multiple objects. Associate two measures with a milestone or outcome and specify a calculation logic to aggregate the measure results. The aggregated measure result is compared against the target to track users' progress toward a goal. For example, count the total number of activities such as calls and emails, which track separate objects, on the same milestone. Previously, milestones or outcomes could reference only one measure, and more complicated use cases required customization such as custom objects or fields.

**Where:** This change applies to:

- Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions with Sales Cloud, Service Cloud, or Salesforce Platform. An Enablement add-on license is required, or you can try this enhancement with Enablement Lite.
- Supported [Experience Cloud sites](#) accessed through Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions with Sales Cloud and Service Cloud. An Enablement add-on license and PRM add-on license are required.

**How:** To create a composite goal, Enablement admins add an outcome or milestone component to a program from the Program Builder. Then Enablement admins add multiple measures to the goal and select a calculation logic to aggregate the results of the measures.

Program > Milestone

Milestone

\* Title  
Log 100 Activities by Day 15

\* Description  
Log 50 prospecting calls and emails with your accounts using tasks. To make sure your calls

\* Day  
15

Measure 1  
Number of Logged Calls

Measure 2  
Number of Logged Emails

Calculation Logic  
Add

Target  
100

Enablement users complete a composite goal outside the Guidance Center and refresh progress to view the milestone progress details. Partner users complete a composite goal outside their supported Experience Cloud site and refresh progress to view the progress details.

SEE ALSO:

[Salesforce Help: Managing Composite Outcomes and Milestones \(can be outdated or unavailable during release preview\)](#)

## Get Transparency on Your Goal Progress with Itemized Progress Details

Enablement users can now gain deeper insights on their progress toward an outcome or a milestone with display of the data being measured. The qualifying records tables in the Guidance Center and in supported Experience Cloud site pages show individual records that contribute to a goal completion. Users can analyze the qualifying records to validate their progress toward a goal and take strategic decisions to complete the program.

**Where:** This change applies to:

- Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions with Sales Cloud, Service Cloud, or Salesforce Platform. An Enablement add-on license is required, or you can try this enhancement with Enablement Lite.
- Supported [Experience Cloud sites](#) accessed through Lightning Experience in Enterprise, Performance, Unlimited, and Developer 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 refresh program progress. To view the qualifying records for an outcome or milestone, reps click that goal. Reps can select a record to view its details on the record home page.

← Close Deals worth \$200,000

**Close Deals worth \$200,000**

Close one or more opportunities that add up to \$200,000. To make sure the opportunities are counted, set the opportunity Stage field to Closed Won.

35%

Due 8/19/2024

**Progress Details**

Your total: 70,000 of 200,000

**Qualifying Records**

Total Revenue from Deals Won

| Name                       | Close Date   | Amount    |
|----------------------------|--------------|-----------|
| Global Media - 400 Widgets | Apr 18, 2024 | 50,000.00 |
| Acme - 200 Widgets         | Apr 16, 2024 | 20,000.00 |

Partner users access a program in a supported Experience Cloud site and refresh program progress. To view the qualifying records for an outcome or milestone, users click that goal. Users can select a record to view its details on the site.

Milestone

**Close a Deal by Day 90**

Close your first opportunity. To make sure it's counted, set the Opportunity Stage field to Closed Won.

Completed 4/16/2024

**Progress Details**

Record Count: 1 of 1  
Congrats! You did it.

**Qualifying Records**

Number of Deals Won

| Name                       | Close Date   |
|----------------------------|--------------|
| Global Media - 400 Widgets | Apr 16, 2024 |

SEE ALSO:

[Salesforce Help: Take Enablement Programs \(can be outdated or unavailable during release preview\)](#)

## Help Users Discover and Complete Enablement Program Goals on Time

Encourage discovery, adoption, and completion of your company's sales programs in Lightning Experience or partner programs in Experience Cloud sites. Provide accountability and transparency for users who contribute to your revenue outcomes by keeping them informed about upcoming due dates for programs, outcomes, and milestones. Help users stay focused by minimizing the noise and turning on only the notifications that make sense for your company and fine-tuning when those notifications are sent.

**Where:** This change applies to:

- Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions with Sales Cloud, Service Cloud, or Salesforce Platform. An Enablement add-on license is required, or you can try this enhancement with Enablement Lite.
- Supported [Experience Cloud sites](#) accessed through Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions with Sales Cloud and Service Cloud. An Enablement add-on license and PRM add-on license are required.

**How:** In Setup, the Enablement Settings and Partner Enablement Settings pages include new options for managing notifications. Specify whether users receive a notification when a program is assigned or completed. Send reminders when a program hasn't been started or for upcoming program, outcome, or milestone due dates. For each type, specify whether users receive in-app notifications or email notifications.

| Manage Notifications                                                                                         |                                     |                                     |                                                                                                           |
|--------------------------------------------------------------------------------------------------------------|-------------------------------------|-------------------------------------|-----------------------------------------------------------------------------------------------------------|
| Specify which notifications users receive for programs they're taking and when those notifications are sent. |                                     |                                     |                                                                                                           |
| Notification Type                                                                                            | In-App Notification                 | Email Notification                  | When to Send                                                                                              |
| Milestone or Outcome Due                                                                                     | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | After 20% of days have elapsed between the program's start date and the milestone's or outcome's due date |
| Program Assigned                                                                                             | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | On the start date                                                                                         |
| Program Completed                                                                                            | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | When the user completes the program                                                                       |
| Program Due                                                                                                  | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | After 20% of days have elapsed between the program's start date and the program's due date                |
| Program Not Started                                                                                          | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | After 20% of days have elapsed between the program's start date and the program's due date                |

Previously, users always received an in-app and email notification when a program was assigned or completed, and no options were available for modifying these settings.

#### SEE ALSO:

[Salesforce Help: Manage Notifications for Enablement Programs, Outcomes, and Milestones \(can be outdated or unavailable during release preview\)](#)

## Develop, Test, and Deploy Enablement Programs and Measures More Easily

Elevate your Enablement rollout strategy by integrating programs and measures with other sophisticated enterprise operations in your Salesforce implementation. After you develop and test Enablement programs and measures in a sandbox, easily deploy them to production with Metadata API for change sets and Salesforce CLI. Previously, Enablement admins could develop and test programs and measures in a sandbox but couldn't move them to production.

**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, or you can try this enhancement with Enablement Lite.

**How:** Use the new `EnablementMeasureDefinition` and `EnablementProgramDefinition` metadata types with change sets and Salesforce CLI. To avoid errors, retrieve and deploy program dependencies first, including measures, Digital Experiences content, surveys, and sites. Then, retrieve and deploy programs.

#### SEE ALSO:

[Salesforce Help: Deploy Enablement Programs and Measures from a Sandbox to Production \(can be outdated or unavailable during release preview\)](#)

[Salesforce Developers: EnablementProgramDefinition \(can be outdated or unavailable during release preview\)](#)

[Salesforce Developers: EnablementMeasureDefinition \(can be outdated or unavailable during release preview\)](#)

[Salesforce Developers: Deploying and Retrieving Metadata \(can be outdated or unavailable during release preview\)](#)

[Salesforce Developers: Salesforce CLI Command Reference \(can be outdated or unavailable during release preview\)](#)

[Trailhead: Package.xml Metadata Management](#)

## Tailor Your Enablement Programs to Your Company's Preferred Content System - Developer Preview

Provide a more streamlined connection between your company's preferred content management system and your Enablement programs. Create custom exercise types that reference content from your own repository or a third-party repository. With custom exercise types, you can easily bring content from anywhere into your program. Previously, exercise types in Enablement programs supported content only from Salesforce systems, including Digital Experiences content, Trailhead, and Assessment surveys. Your sales reps can view custom exercise content in the flow of a program without navigating to a different page.



**Where:** This change applies to Lightning Experience in Developer Edition with Sales Cloud. Custom exercise types are available as a developer preview feature. The feature isn't generally available unless or until Salesforce announces its general availability in documentation or in press releases or public statements.

**Who:** To add custom exercises to Enablement programs, users must have the View Setup and Configuration permission.

**How:** Salesforce developers at your company configure the custom items for your Salesforce org by using Apex classes and render them on the Salesforce platform through Lightning Web Components. Developers then map a preferred repository to host content for the custom exercises.

Enablement admins first add their content to the mapped repository. Then Enablement admins add a custom exercise to their program from Program Builder and select the content for it.

Sales reps view the referenced content in the flow of the program when they click a custom exercise in the Guidance Center.

The screenshot shows a form titled "Program > Exercise" with a sub-header "Google Recordings". The form contains the following fields:

- Name:** Watch Product Demo Meeting Recording
- Description:** Watch the recording of a product demo meeting to understand the features and know
- Day:** 5
- Google Recordings:** Product Demo Recording

SEE ALSO:

- [Salesforce Help: Custom Exercise Types in Enablement Programs \(can be outdated or unavailable during release preview\)](#)
- [Sfdc\\_enablement Namespace \(Developer Preview\)](#)

## 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, Unlimited, and Developer editions with Sales Cloud, Service Cloud, or Salesforce Platform. An Enablement add-on license is required, or you can try this enhancement with Enablement Lite.
- Supported [Experience Cloud sites](#) accessed through Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions with Sales Cloud and Service Cloud. An Enablement add-on license and PRM add-on license are required.

**How:** These changes are available.

- Enablement is now available in Developer Edition with Sales Cloud, Service Cloud, or Salesforce Platform. Enablement in Developer Edition doesn't include Einstein Conversation Insights (ECI) or surveys.
- When you add an exercise and create Digital Experiences content for the exercise in Program Builder, the title and description you enter for the exercise persist to the New Content window. Previously, you specified the title and description separately in the exercise properties in Program Builder and in the New Content window.

- You can edit Digital Experiences content for an exercise directly from Program Builder. Previously, to edit content for an exercise, you could only navigate to the Digital Experiences app, locate the Enablement workspace, and edit content outside of the program.
- The Usage Info tab on the detail page of a content record in the Digital Experiences app now lists the published programs where the content is used. This enhancement helps ensure that content managers don't disrupt users who are taking a program by accidentally unpublishing or deleting content from the program. For Enablement Lite, the Usage Info tab doesn't show data if you published a program, turned off Enablement Lite, and then turned it on again. In this case, unpublish your Enablement Lite programs and republish them to see the Usage Info tab details.
- Your company can request a change in the maximum number of users assigned to or enrolled in a partner program in supported Experience Cloud sites. To change the default limit of 10,000 users, submit a Salesforce Customer Support case. Previously, this limit was fixed.
- In sandboxes, the Prepare Your Sandbox for Enablement step now appears first on the Enablement Settings page in Setup. Previously, this step appeared at the end of the page.

#### SEE ALSO:

[Salesforce Help: Enablement Compatibility with Other Products and Environments \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Guidelines for Digital Experiences Content in Enablement Programs \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Create Content for an Exercise from Program Builder \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Sandbox Support for Enablement \(can be outdated or unavailable during release preview\)](#)

## Partner Relationship Management

Partner sellers can get help drafting personalized, thoughtful emails to their contacts and leads quickly with an assist from Einstein generative AI.

#### IN THIS SECTION:

[Help Partners Send Personalized Sales Emails Fast](#)

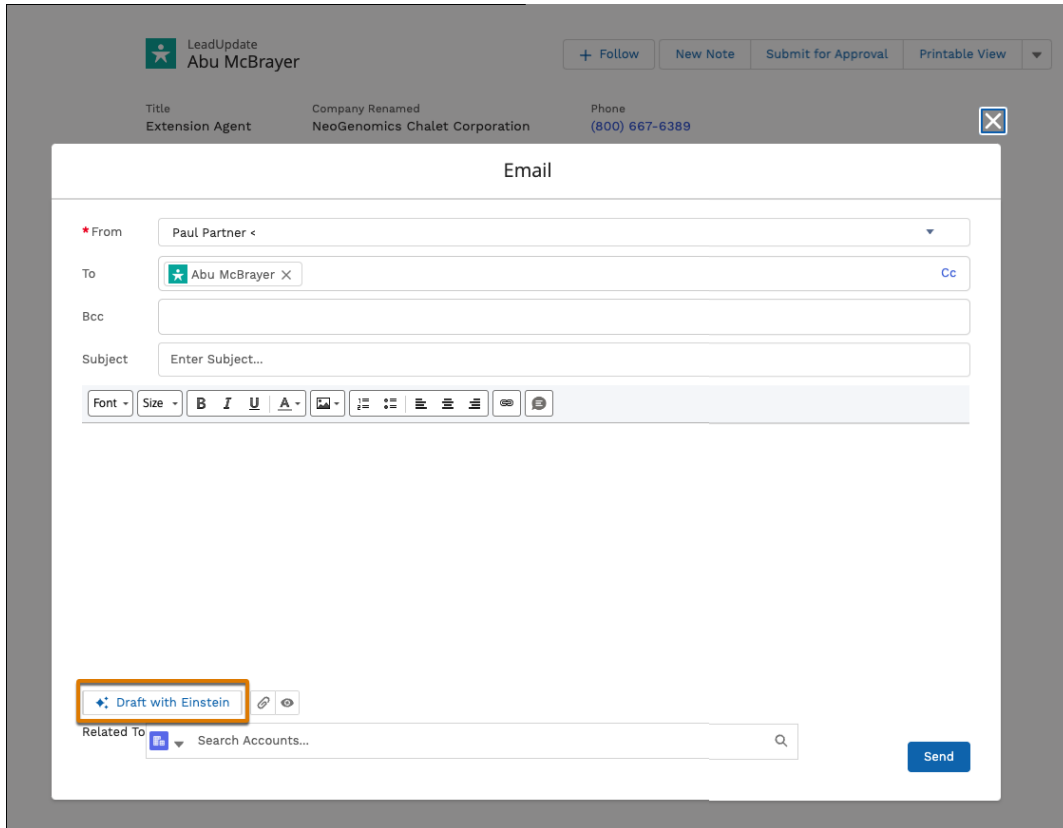
Unleash partner productivity and drive higher email engagement rates with a little help from Einstein generative AI. Einstein Sales Emails and custom sales email prompt templates are now available in Experience Cloud sites built on the Aura framework. From the email composer on contacts and leads, partners can lean on generative AI to quickly draft impactful emails, such as introductions, nudges, and meeting invitations. Plus, any custom sales emails prompt templates that you create in Prompt Builder for your Lightning Experience users are also available for partner users from their Experience Cloud sites.

### Help Partners Send Personalized Sales Emails Fast

Unleash partner productivity and drive higher email engagement rates with a little help from Einstein generative AI. Einstein Sales Emails and custom sales email prompt templates are now available in Experience Cloud sites built on the Aura framework. From the email composer on contacts and leads, partners can lean on generative AI to quickly draft impactful emails, such as introductions, nudges, and meeting invitations. Plus, any custom sales emails prompt templates that you create in Prompt Builder for your Lightning Experience users are also available for partner users from their Experience Cloud sites.

**Where:** This change applies to Experience Cloud [Aura sites](#) accessed through Lightning Experience in Enterprise and Unlimited editions. A [PRM add-on license](#) and an Einstein for Sales add-on license are required for each partner user.

**How:** Partners start by creating an email from a contact or lead. Click **Draft with Einstein**, choose an email prompt type from the list, review and edit the email, and then click **Send**.



SEE ALSO:

[Salesforce Help: Set Up Einstein Sales Emails for Partners \(can be outdated or unavailable during release preview\)](#)

[Einstein Features](#)

## Sales Performance Management

Get a serious bump in processing performance while plotting high-volume data such as ArcGIS Online layers and complex shape layers when you enable the new Salesforce Maps framework. Plan for and centralize your company's unique segmentation, territories, and quota targets in Sales Planning. And determine compensation for reps based on their effective territory assignment dates in Enterprise Territory Management, now named Sales Territories.

IN THIS SECTION:

[Salesforce Maps and Salesforce Maps Advanced](#)

Plot high-volume data such as ArcGIS Online layers and complex shape layers in a fraction of the usual time when you try out the new Salesforce Maps framework. And get the scoop on changes underway for importing data from custom data sources within Salesforce Maps Advanced.

[Sales Planning](#)

Define a sales strategy with input from key stakeholders. Structure sales plans that reflect your company's unique segmentation, territories, and quota targets—all in one place. In the latest Sales Planning experience, sales leaders and ops determine which disciplines to apply during planning processes.

### [Sales Territories \(Formerly Enterprise Territory Management\)](#)

Get to know Enterprise Territory Management as its new name, Sales Territories. And determine compensation for reps when their effective start and end dates differ from the dates they were added to and removed from their assigned territories.

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Plot high-volume data such as ArcGIS Online layers and complex shape layers in a fraction of the usual time when you try out the new Salesforce Maps framework. And get the scoop on changes underway for importing data from custom data sources within Salesforce Maps Advanced.

### IN THIS SECTION:

#### [Get More from Salesforce Maps with an Enhanced User Experience](#)

Deliver dramatic performance improvements while plotting high-volume data including ArcGIS Online layers and complex shape layers when you switch to the new framework in Salesforce Maps. And give your reps access to a modern and robust list view experience.

#### [Changes Afoot for Custom Data Sources](#)

Prepare for changes that affect the way you import data from custom sources within Salesforce Maps Advanced. That way your reps continue making the most of plotting that data on the map without interruptions.

## Get More from Salesforce Maps with an Enhanced User Experience

Deliver dramatic performance improvements while plotting high-volume data including ArcGIS Online layers and complex shape layers when you switch to the new framework in Salesforce Maps. And give your reps access to a modern and robust list view experience.

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

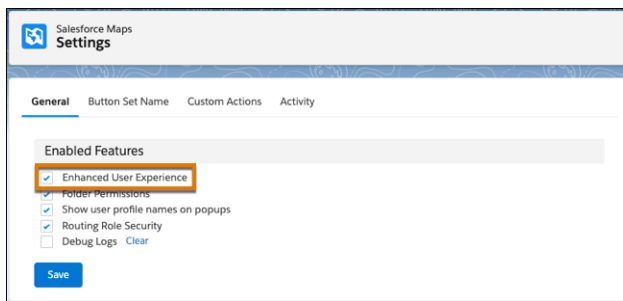
**When:** Expect the new Salesforce Maps framework by or shortly after the general availability of Summer '24.

**Why:** When you enable the enhanced framework, your reps can plot high volumes of data including ArcGIS Online layers and complex shape layers in less time. The framework also comes with these benefits.

| Feature Area            | Enhanced Framework Benefits                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
|-------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| The map                 | <p>Your reps get access to a world of available data for plotting on the map. Here's how the data helps them.</p> <ul style="list-style-type: none"> <li>Plot extensive, subscription-free data by using ArcGIS Living Atlas of the World, from Esri. For example, plot weather events and their historical paths, demographics, and utility and agricultural infrastructures. See <a href="#">Plot Publicly Available Content from Around the World</a>.</li> <li>Identify recent traffic events such as road closures, accidents, and construction areas.</li> <li>Page between neighboring markers and shape layers that overlap.</li> </ul> |
| List views              | <p>Modernized list views unlock your reps' productivity. Here's how.</p> <ul style="list-style-type: none"> <li>Perform actions on rows within any tab in list views. For example, add records to campaigns, change record owners, and set proximity centers based on record addresses.</li> <li>Refine list views continuously instead of having to create ones that include your changes.</li> </ul>                                                                                                                                                                                                                                          |
| Shape drawing functions | <p>Drawn shapes offer flexibility for your reps. Here's how.</p> <ul style="list-style-type: none"> <li>When your reps edit drawn shapes, they're moveable to other areas on the map.</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                |

| Feature Area | Enhanced Framework Benefits                                                                                                                                                                                                                                                               |
|--------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|              | <ul style="list-style-type: none"> <li>Set the center in shapes for travel time, travel distance, and circular boundaries by address or by latitude and longitude coordinates. As your reps enter addresses, Salesforce Maps suggests addresses with an auto-complete feature.</li> </ul> |
| Appearance   | The enhanced framework adds a refreshed and functional style for marker pop-ups, shape drawing features, list views, and marker clusters.                                                                                                                                                 |

**How:** To experience the new framework, open Salesforce Maps configuration, click **Settings**, and then select **Enhanced User Experience**.



SEE ALSO:

[Salesforce Help: Switching to the Enhanced User Experience \(can be outdated or unavailable during release preview\)](#)

## Changes Afoot for Custom Data Sources

Prepare for changes that affect the way you import data from custom sources within Salesforce Maps Advanced. That way your reps continue making the most of plotting that data on the map without interruptions.

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

**Why:** Support for importing data from custom sources retires on May 16, 2025. But an alternative method for bringing in the data provides an option for storing the data in Salesforce.

**How:** First create a custom object so that you can store your data in its records, and then import your data by using the Data Import Wizard. Next, create a base object that represents your newly created custom object. And finally, create your marker layers that include the imported data for your sales reps.

SEE ALSO:

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

[Salesforce Help: Import Data with the Data Import Wizard \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Create Base Objects to Plot on Maps \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Create Marker Layers \(can be outdated or unavailable during release preview\)](#)

## Sales Planning

Define a sales strategy with input from key stakeholders. Structure sales plans that reflect your company's unique segmentation, territories, and quota targets—all in one place. In the latest Sales Planning experience, sales leaders and ops determine which disciplines to apply during planning processes.

## IN THIS SECTION:

[Data Sources Management](#)

Start your sales planning process with relevant data from Salesforce or from other proprietary and third-party sources that you connect to in Sales Planning.

[Segmentation](#)

Plan for and capture your company's unique business units and record assignments within Sales Planning. Segment by location, industry, and any demographics from your data sources so that your business units align with your business objectives.

[Territory Planning](#)

Assign work within territories fairly by applying the drive-time network, update details and assignments directly from the legend, and anticipate changes that affect how users interact with the legend.

[Quota Planning](#)

Motivate sellers while achieving business objectives when you create quota plans in Sales Planning. Add insight to your quota plans by adding historical role and calculated data.

[Limited Availability of Original Sales Planning](#)

Plan your company's sales strategy in the original Sales Planning experience until Winter '25. Afterward, plan new strategies with the latest Sales Planning experience, in which you structure sales plans that reflect your company's unique segmentation, territories, and quota targets.

## SEE ALSO:

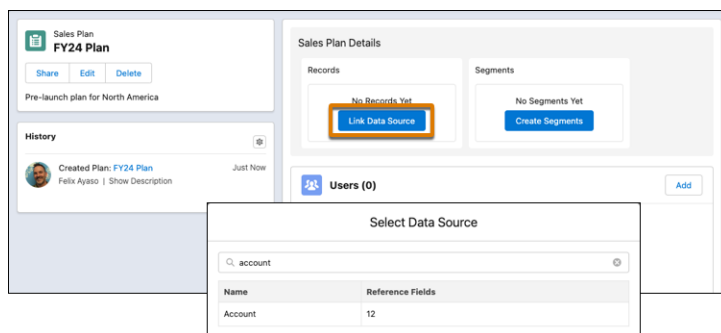
[Salesforce Help: Sales Planning \(can be outdated or unavailable during release preview\)](#)

## Data Sources Management

Start your sales planning process with relevant data from Salesforce or from other proprietary and third-party sources that you connect to in Sales Planning.

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

**How:** In Sales Planning, select **Data Sources**. Add data sources that include standard Salesforce data or even proprietary and third-party data from Data Pipelines. For example, search for and select from datasets that include accounts, accounts and leads, data from custom objects, or data from outside Salesforce. After you create a sales plan, you're ready to link to a data source.



## SEE ALSO:

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

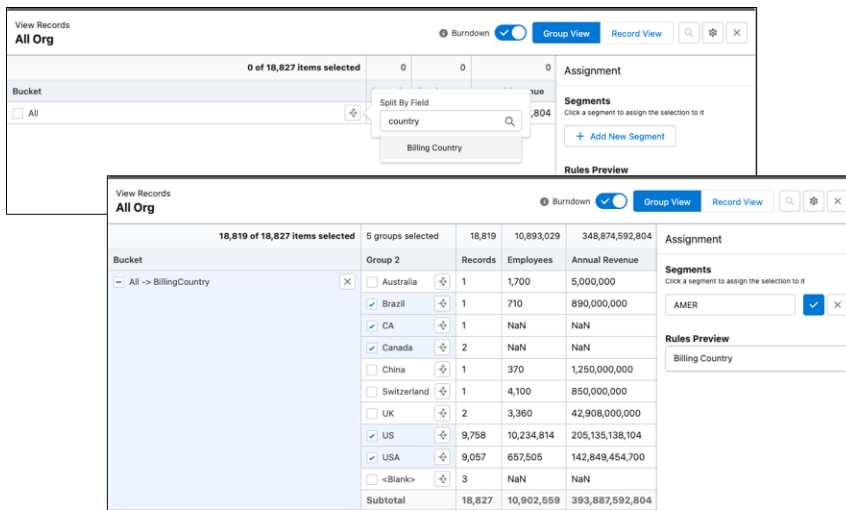
## Segmentation

Plan for and capture your company's unique business units and record assignments within Sales Planning. Segment by location, industry, and any demographics from your data sources so that your business units align with your business objectives.

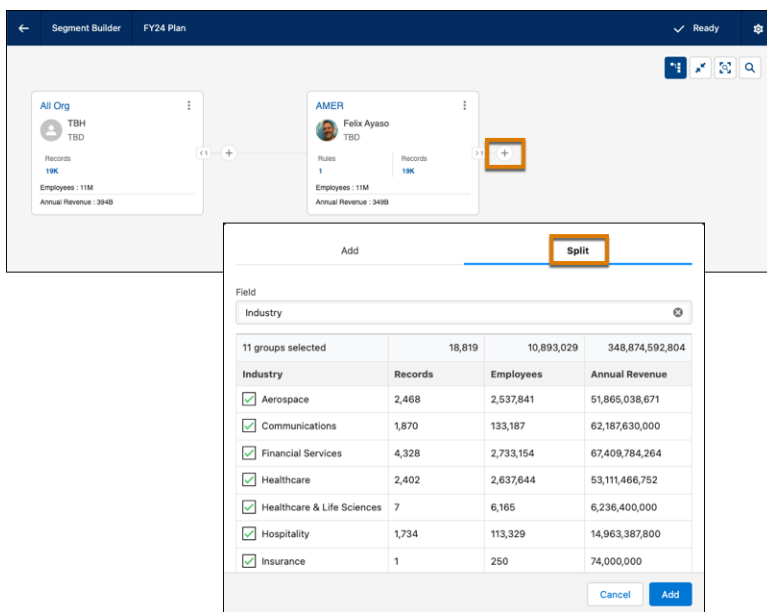
**Where:** This change applies to Lightning Experience and Salesforce Classic in Professional, Enterprise, Unlimited, and Developer editions.

**How:** In Sales Planning, select your sales plan, and then click **Create Segments**. Start with the top part of your sales hierarchy, and then assign users and records to those segments. Split the top segments by a field. For example, to segment by country, split your segment by Billing Country.

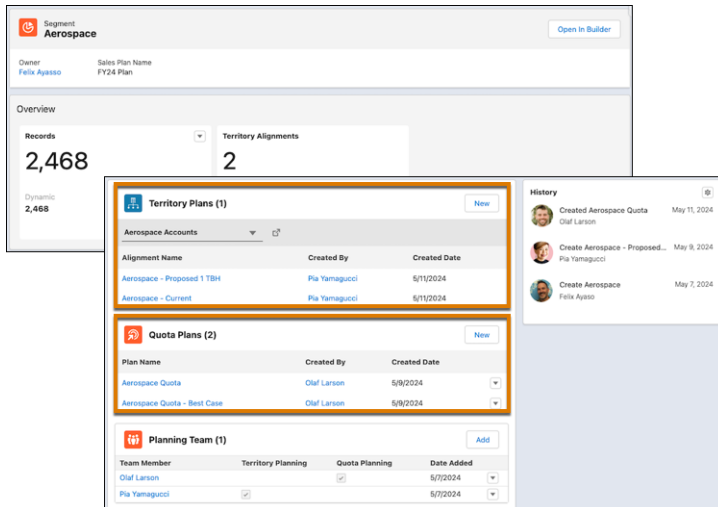
Create other segments from splits, or further split segments into smaller ones when you select specific fields depending on your goal. For example, you create a segment for the AMER region that includes accounts in the Americas.



Then you split AMER into segments by industry. From any segment, delegate planning authority to team leaders and members.



When you're done splitting your segments, you're ready to add other planners to your split segments. Then those planners can carve territories and plan quotas.



SEE ALSO:

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

## Territory Planning

Assign work within territories fairly by applying the drive-time network, update details and assignments directly from the legend, and anticipate changes that affect how users interact with the legend.

IN THIS SECTION:

### [Estimate Travel Times](#)

Distribute work within territories fairly by estimating travel times between neighboring customers. Consider visit frequency and limit travel time estimates to only assigned units in Territory Planning.

### [Edit Territory and Assignment Details on the Legend](#)

Adjust details and assignments for individual units, areas, and boundaries when you edit them directly from the legend in Territory Planning.

### [Other Improvements in Territory Planning](#)

Better predict legend behaviors, clone datasets using the names of your choice, and recall the setting for including unassigned units in alignments in Territory Planning.

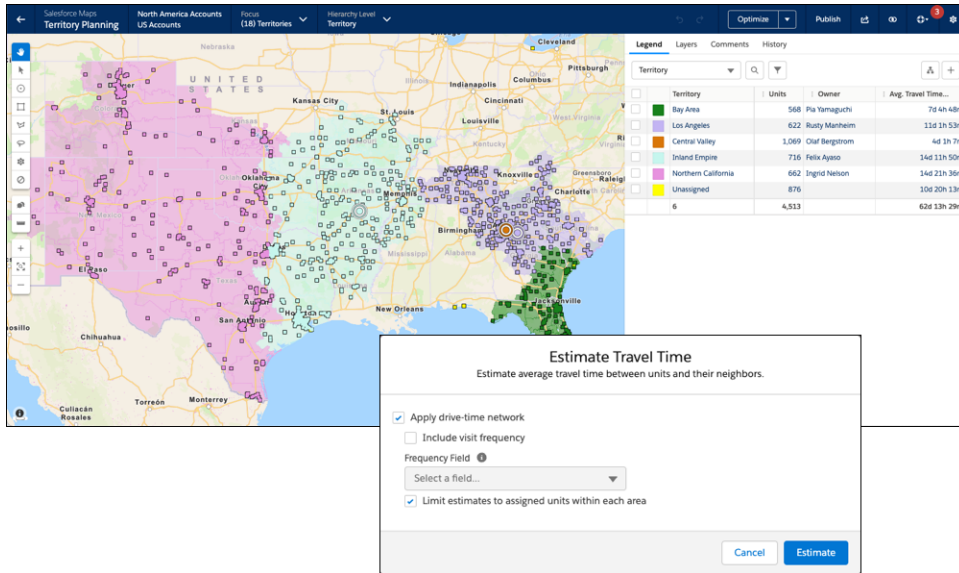
## Estimate Travel Times

Distribute work within territories fairly by estimating travel times between neighboring customers. Consider visit frequency and limit travel time estimates to only assigned units in Territory Planning.

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

**How:** Open an alignment, and then click **Options > Travel Time Estimates**. Select options to consider visit frequency and whether to estimate travel times for only assigned units.



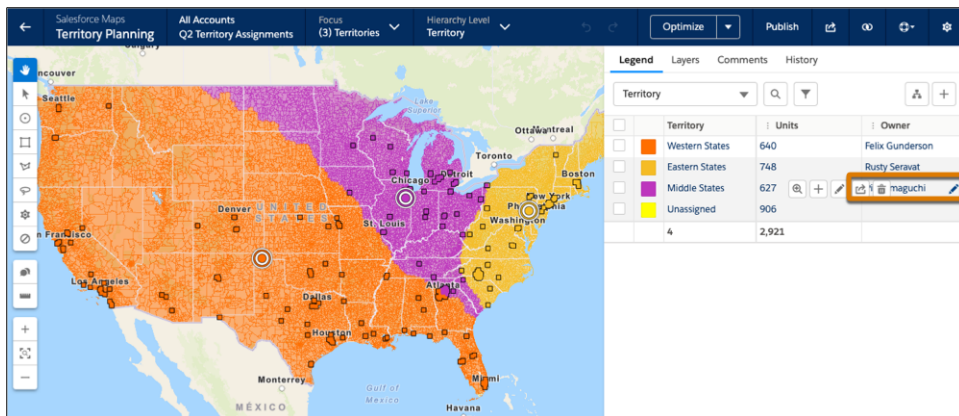


### Edit Territory and Assignment Details on the Legend

Adjust details and assignments for individual units, areas, and boundaries when you edit them directly from the legend in Territory Planning.

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

**How:** To update territory, assignment, and attribute details directly on the legend, hover over the element that you want to update. Then click **Edit**.



Some updates, such as calculations, appear after you reload the focus or the legend.

### Other Improvements in Territory Planning

Better predict legend behaviors, clone datasets using the names of your choice, and recall the setting for including unassigned units in alignments in Territory Planning.

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

**Why:** Territory Planning now comes enabled with these improvements.

| Function                       | Improvement                                                                                                                                                                                                                                                                                                                                                                                        |
|--------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Legend panel                   | <p>Legend functions now work more like you expect. Here's how.</p> <ul style="list-style-type: none"> <li>• Adjust the size of the legend and preserve it even after changing the size of the browser and returning to alignments.</li> <li>• Filter data, create rules, and assign units by selecting fields and their values from Salesforce instead of entering the values manually.</li> </ul> |
| Dataset and alignment cloning  | When cloning datasets and alignments, name them during the cloning process instead of having to first save them and then change their names.                                                                                                                                                                                                                                                       |
| Unassigned units in alignments | Control whether unassigned units appear when opening alignments for the first time. To include unassigned units, select the option to include unassigned units when first opening alignments in Territory Planning Settings. Also, Territory Planning now recalls whether to include unassigned units when returning to alignments.                                                                |
| Boundaries in datasets         | <p>Territory Planning includes updated boundaries so that you plan territories with the latest and most accurate ones.</p> <p>Download the most recent data coverage, which you can access in <a href="#">Data Coverage for Salesforce Maps and Sales Performance Management</a>.</p>                                                                                                              |

## SEE ALSO:

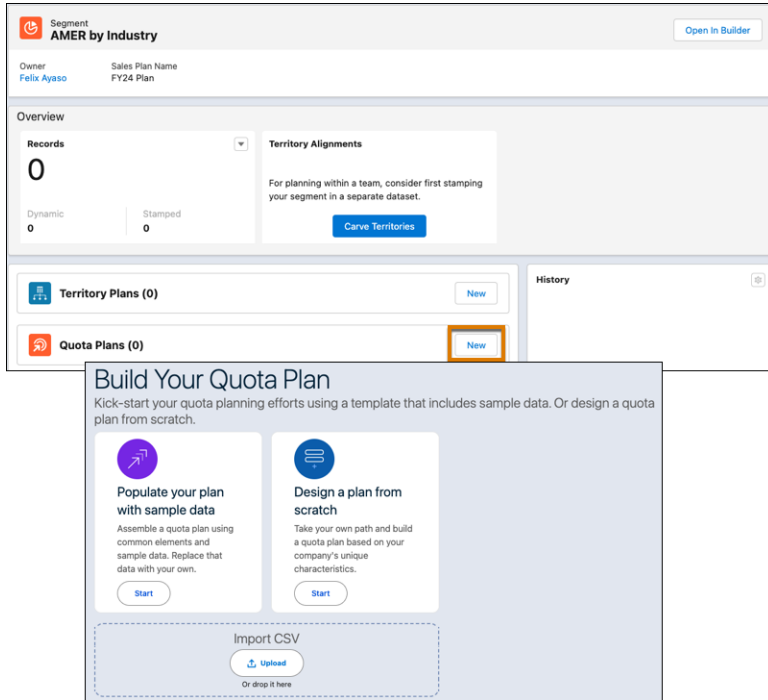
[Salesforce Help: Configure Options for Data Management \(can be outdated or unavailable during release preview\)](#)

## Quota Planning

Motivate sellers while achieving business objectives when you create quota plans in Sales Planning. Add insight to your quota plans by adding historical role and calculated data.

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

**How:** Open a segment in Sales Planning. In Quota Plans, click **New**. You get options to create a plan with sample data or start one from scratch. Or import your plan from a CSV file.



For example, you import from a CSV file. In your file, you include your hierarchy, owner, and historical and role details. After you import the file, continue your quota planning.

### Import

• CSV File

FY24\_AMER.csv

• Territory Identifier Column

Territory

**Columns to Import**

Name-matched columns are automatically mapped  Show only selected rows

| Import                              | CSV Column    | Quota Plan Column | Sample CSV Data            | Type      |
|-------------------------------------|---------------|-------------------|----------------------------|-----------|
| <input checked="" type="checkbox"/> | Parent        | Parent            | , SVP, SVP, West, West     | Territory |
| <input checked="" type="checkbox"/> | Owner         | Owner             | Hank Scurry, Heather A...  | User      |
| <input checked="" type="checkbox"/> | Role          | Role              | SVP, RVP 1, RVP 2, AE 6... | Text      |
| <input checked="" type="checkbox"/> | PY Attainment | PY Attainment     | 900000, 425000, 4750...    | Numeric   |

| Territory | Owner       | Add     | Role  | # PY Attainment |
|-----------|-------------|---------|-------|-----------------|
| SVP       | TBH         | + ✎ ✕ 🗑 | SVP   | 900,000         |
| East      | TBH         | + ✎ ✕ 🗑 | RVP 1 | 425,000         |
| East 1    | TBH         | + ✎ ✕ 🗑 | AE 6  | 65,000          |
| East 2    | Bob Hodges  | + ✎ ✕ 🗑 | AE 6  | 70,000          |
| East 3    | Drew Harper | + ✎ ✕ 🗑 | AE 7  | 90,000          |
| East 4    | Felix Ayaso | + ✎ ✕ 🗑 | AE 7  | 90,000          |

SEE ALSO:

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

## Limited Availability of Original Sales Planning

Plan your company's sales strategy in the original Sales Planning experience until Winter '25. Afterward, plan new strategies with the latest Sales Planning experience, in which you structure sales plans that reflect your company's unique segmentation, territories, and quota targets.

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

**Why:** The latest Sales Planning experience better aligns with your planning teams' processes. And it centralizes data when you create datasets that include standard Salesforce data and even proprietary and third-party data from Data Pipelines.

**How:** If you need more time to migrate, you can still create plans in the original Sales Planning experience until Winter '25.

SEE ALSO:

[Salesforce Help: Legacy Sales Planning \(can be outdated or unavailable during release preview\)](#)

## Sales Territories (Formerly Enterprise Territory Management)

Get to know Enterprise Territory Management as its new name, Sales Territories. And determine compensation for reps when their effective start and end dates differ from the dates they were added to and removed from their assigned territories.

**IN THIS SECTION:**[Enterprise Territory Management Is Now Sales Territories](#)

Manage territories the same way you did by using Enterprise Territory Management, but now under the name Sales Territories. The new name better represents key disciplines for designing and managing territories as part of your teams' overall efforts around sales performance management. And most importantly, Sales Territories isn't just for enterprise businesses!

[Compensate Reps Based on Effective Territory Coverage Dates](#)

Determine compensation for reps based on their effective territory assignment dates when those dates differ from the assignment dates entered into Sales Territories.

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Manage territories the same way you did by using Enterprise Territory Management, but now under the name Sales Territories. The new name better represents key disciplines for designing and managing territories as part of your teams' overall efforts around sales performance management. And most importantly, Sales Territories isn't just for enterprise businesses!

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

**SEE ALSO:**

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

## Compensate Reps Based on Effective Territory Coverage Dates

Determine compensation for reps based on their effective territory assignment dates when those dates differ from the assignment dates entered into Sales Territories.

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

**Why:** Territory assignment dates can differ from effective dates. For example, the assignment start date for a rep reflects when she joined the company on May 1. But she didn't assume ownership of her territory until her onboarding finished on May 31. Tracking that adjusted start date ensures fair compensation for her effective territory coverage.

**How:** Track adjusted start dates, end dates, and reasons for any adjustments in custom fields or triggers that you add to the User Territory Association Logs object and any page layouts you create for it. Then give managers more insight for sales planning, equitable compensation, and analysis of sales performance when they report on that assignment data.

## Email, Calendar, and Integrations

Sales reps can use generative AI in their Salesforce email integrations. Inbox mobile has been retired. The retirement date for Salesforce for Outlook has been extended.

**IN THIS SECTION:**[Einstein Activity Capture](#)

Downloaded connection status reports now have more understandable field names.

[Outlook and Gmail Integration](#)

Sales reps can use generative AI in their Salesforce email integrations.

[Salesforce Inbox \(Retired\)](#)

Review information about the Inbox mobile 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.

## Einstein Activity Capture

Downloaded connection status reports now have more understandable field names.

### IN THIS SECTION:

#### [Understand Downloaded User Connection Reports Quickly](#)

To improve readability when you review connection reports from Einstein Activity Capture Status & Metrics, the terms of service field names changed. In the CSV file for the report, the Terms of Services and Global Terms of Services fields are now named User Auth Terms of Service Accepted and Global Auth User Email Consent Status, respectively.

### SEE ALSO:

[Visualize Key Contacts on the Buyer Relationship Map](#)

[Add Company and Buyer Information to Contacts Automatically](#)

## Understand Downloaded User Connection Reports Quickly

To improve readability when you review connection reports from Einstein Activity Capture Status & Metrics, the terms of service field names changed. In the CSV file for the report, the Terms of Services and Global Terms of Services fields are now named User Auth Terms of Service Accepted and Global Auth User Email Consent Status, respectively.

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

**Who:** This feature is available to users who have Einstein Activity Capture enabled.

**How:** From Setup, in the Quick Find box, enter *Einstein Activity Capture*, and then select **Status & Metrics**. Download connection reports to see the improved field names.

- User Auth Terms of Service Accepted—For user-level authenticated email account connections, this field indicates whether a user accepted the terms of service.
- Global Auth User Email Consent Status—For org or service account connections with email sync, this field indicates the status of the user's acceptance of the terms of service.

### SEE ALSO:

[Salesforce Help: Check Connection Status and Metrics for Einstein Activity Capture Users \(can be outdated or unavailable during release preview\)](#)

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

## Outlook and Gmail Integration

Sales reps can use generative AI in their Salesforce email integrations.

## IN THIS SECTION:

[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 Intuitively](#)

Email and event logging for the Outlook and Gmail integration for users without EAC is more intuitive. The Pick Records button, formerly labeled Edit, makes it clear what the next step is. We also prevent you from logging an email or event without any associated records by removing the Log Now button if no records are associated.

## 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.

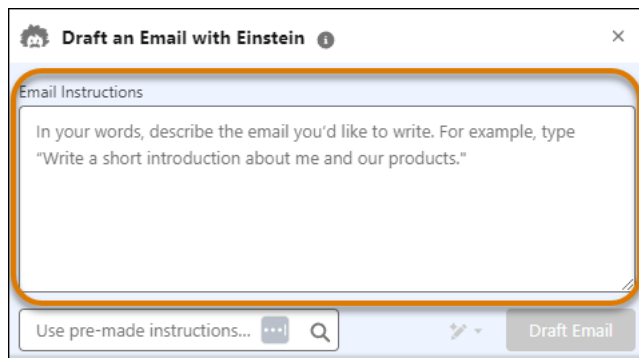
**Where:** This feature is available in Lightning Experience in Performance and Unlimited editions. Einstein generative AI is available in Lightning Experience.

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.

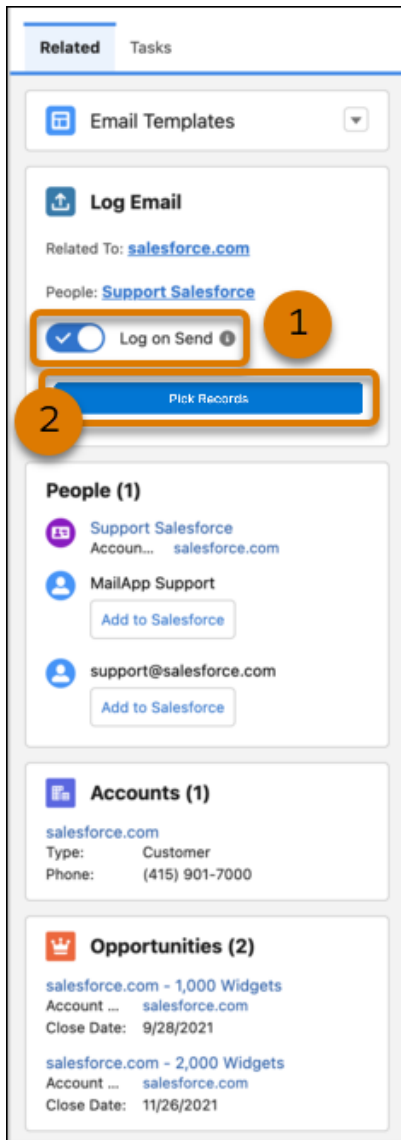
## Log Emails and Events More Intuitively

Email and event logging for the Outlook and Gmail integration for users without EAC is more intuitive. The Pick Records button, formerly labeled Edit, makes it clear what the next step is. We also prevent you from logging an email or event without any associated records by removing the Log Now button if no records are associated.

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

**When:** This change became available with the Summer '24 release.

**How:** 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 by clicking **Pick Records**, and then click **Log on Send** and sending the email.



Attachments are logged by default.

For inbound emails, the sales rep accepts the suggestions (1) or picks the correct records (2) before logging.



The screenshot shows the 'Related' section in Salesforce, which is divided into three main areas:

- Log Email:** This section shows 'Related To: None' and 'People: Sophia Zhang'. Below this, there is a link icon and the text '1/1 Attachment(s) Included'. At the bottom of this section are two buttons: 'Log Now' (highlighted with a red circle '1') and 'Pick Records' (highlighted with a red circle '2').
- People (1):** This section lists two people: Sophia Zhang and Kshitij Gupta. Below the names is an 'Add to Salesforce' button. At the bottom of this section is a 'View All' link.
- Opportunities (2):** This section lists two opportunities:
  - salesforce.com - 1,000 Widgets  
Account ... salesforce.com  
Close Date: 9/28/2021
  - salesforce.com - 2,000 Widgets  
Account ... salesforce.com  
Close Date: 11/26/2021

## Salesforce Inbox (Retired)

Review information about the Inbox mobile retirement.

### IN THIS SECTION:

[Inbox Mobile Was Retired](#)

Inbox mobile is retired as of February 1, 2024.

### 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.

## 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.

### IN THIS SECTION:

#### [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.

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**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. And sales reps can choose which fields to see in their detail pages, and in which order.

### IN THIS SECTION:

#### [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.

#### [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.

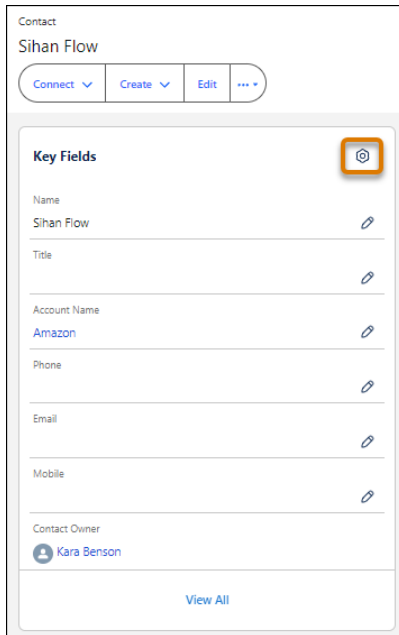
## See the Fields You Want in Sales Cloud Everywhere

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.

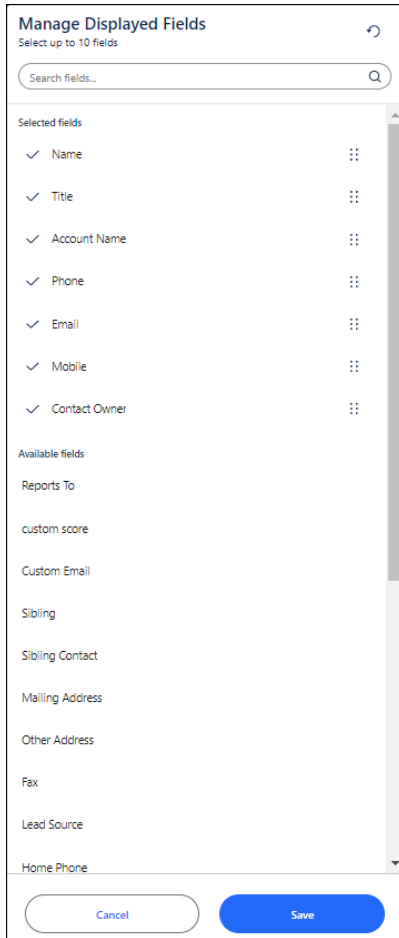
**Where:** This change applies to Lightning Experience in Starter, Enterprise, Performance, Unlimited, and Developer editions.

**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 \(can be outdated or unavailable during release preview\)](#)

## 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: [Date Picker]

Number of Records: 3

**Sort By**

Field: Close Date, Sort Order:  Newest to Oldest

Buttons: 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: Filter Records in Workspace \(can be outdated or unavailable during release preview\)](#)

## Other Changes in the Sales Cloud

Learn about other changes we made in Summer '24.

**IN THIS SECTION:**[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.

[Focus More Easily with the Latest Visual Refresh in Sales Cloud](#)

Sales Cloud has a fresh look in new Salesforce orgs. The streamlined color palette, font, and spacing improvements, with the increased contrast, help you find and focus on the information that matters most to you. This visual enhancement is turned on for all users by default in orgs created starting in Summer '24.

## 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 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**.

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.

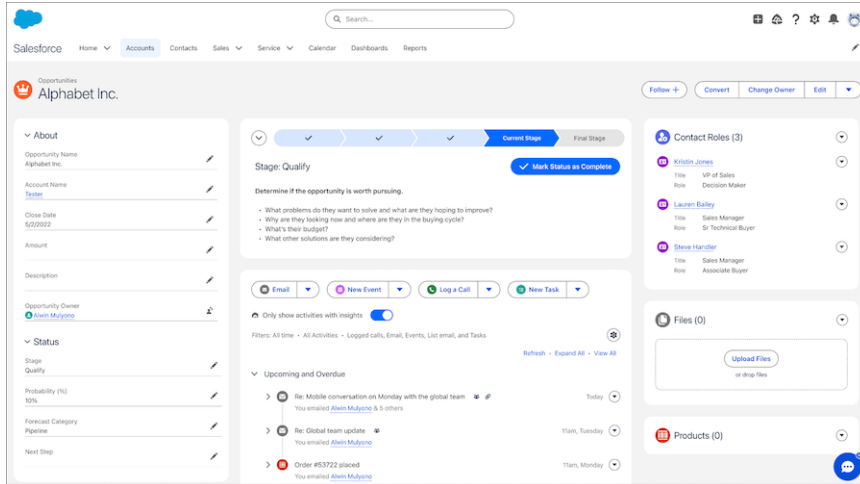
## Focus More Easily with the Latest Visual Refresh in Sales Cloud

Sales Cloud has a fresh look in new Salesforce orgs. The streamlined color palette, font, and spacing improvements, with the increased contrast, help you find and focus on the information that matters most to you. This visual enhancement is turned on for all users by default in orgs created starting in Summer '24.

**Where:** This change applies to Sales Cloud Professional and Sales Cloud Enterprise editions.

**When:** The enhanced Lightning user interface is available in new Sales Cloud Professional Edition orgs created after June 27, 2024, and in new Sales Cloud Enterprise Edition orgs created after July 25, 2024.

**How:**



If the original Lightning Experience is preferred or if themes and customizations are needed, you can opt out of the enhanced Lightning user interface by turning it off in User Interface Settings in Setup.

Financial Services Cloud, available as an add-on in Sales Cloud Enterprise Edition, is currently not compatible with the enhanced Lightning user interface.

#### SEE ALSO:

[Salesforce Blog: We Are Refreshing Our Visual Design – Here’s How It Helps You Work Faster](#)

[Salesforce Help: User Interface Settings](#)

## Salesforce CMS

Clone any content type and its variants, add an API name when you create an enhanced CMS workspace and content, and work with CMS content previews.

#### IN THIS SECTION:

[Save Time with Content Record Cloning in Your Enhanced CMS Workspace](#)

Instead of creating a content record from scratch, make copies of an existing content record of any content type—and its variants—in enhanced CMS workspaces. Organize content into folders, then edit cloned content for quick reuse.

[Preview Custom Content Types in Enhanced CMS Workspaces](#)

Preview custom content types on your enhanced LWR site without leaving your enhanced CMS workspace. Preview custom content types before or after you publish, and change the view mode from desktop to mobile devices to see how the content appears for your site visitors. Previously, you could preview only news, document, or image content.

[Preview CMS Content as a Guest or Authenticated User](#)

To see how your CMS content looks for a broad audience, preview it as a guest user. With this preview option, CMS workspace contributors can preview content on a site even when they aren’t contributors to that site. To see your content as a customer who’s logged in, preview it as an authenticated user.

### [Secure Linked Sources in Salesforce CMS Content with Trusted URLs](#)

Salesforce's strict content security policy (CSP) rules help prevent code injection attacks. Now, when you create CMS content and insert a source image file with an external link, you must add the domain of the hosted image to your org's trusted URL list. This way, Salesforce CMS users can preview the linked image content and other content types that reference these images, such as a news item with a banner image.

### [Add an API Name to New Enhanced CMS Workspaces and Content](#)

You can now use API names as a developer-friendly way to identify new enhanced CMS workspaces and CMS content. The API Name field is required when you create a new enhanced CMS workspace. It's not required for content, but if you leave it blank, Salesforce creates an API name for you. In Summer '24, after you save the workspace or content, you can't change its API name.

## Save Time with Content Record Cloning in Your Enhanced CMS Workspace

Instead of creating a content record from scratch, make copies of an existing content record of any content type—and its variants—in enhanced CMS workspaces. Organize content into folders, then edit cloned content for quick reuse.

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

**How:** There are two ways to clone content. From the content detail page in your enhanced CMS workspace, click **Clone**. Or, from the row-level actions in the workspace's content list, select **Clone**. You can clone variants of the content record, too.

SEE ALSO | [Salesforce Help: Create and Clone Content in a CMS Workspace](#)

## Preview Custom Content Types in Enhanced CMS Workspaces

Preview custom content types on your enhanced LWR site without leaving your enhanced CMS workspace. Preview custom content types before or after you publish, and change the view mode from desktop to mobile devices to see how the content appears for your site visitors. Previously, you could preview only news, document, or image content.

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

**How:** Add your enhanced LWR site as a channel to your enhanced CMS workspace. Then, from the Pages menu in Experience Builder, create a CMS Content page for the site. To preview content in an enhanced CMS workspace, open the content detail page, and then click **Preview**.

SEE ALSO:

[Salesforce Help: Preview Salesforce CMS Content on Your Site \(can be outdated or unavailable during release preview\)](#)

## Preview CMS Content as a Guest or Authenticated User

To see how your CMS content looks for a broad audience, preview it as a guest user. With this preview option, CMS workspace contributors can preview content on a site even when they aren't contributors to that site. To see your content as a customer who's logged in, preview it as an authenticated user.

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



**How:** When you preview CMS content, switch between Authenticated User and Guest User with the Preview As menu. To preview as a guest user, make sure that the enhanced LWR site has public access enabled. To preview as an authenticated user, a CMS workspace contributor must also be a contributor to the site.

SEE ALSO:

[Salesforce Help: Preview Salesforce CMS Content on Your Site \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Control Public Access to Your Experience Builder Sites \(can be outdated or unavailable during release preview\)](#)

## Secure Linked Sources in Salesforce CMS Content with Trusted URLs

Salesforce's strict content security policy (CSP) rules help prevent code injection attacks. Now, when you create CMS content and insert a source image file with an external link, you must add the domain of the hosted image to your org's trusted URL list. This way, Salesforce CMS users can preview the linked image content and other content types that reference these images, such as a news item with a banner image.

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

SEE ALSO:

[Salesforce Help: Manage Trusted URLs \(can be outdated or unavailable during release preview\)](#)

## Add an API Name to New Enhanced CMS Workspaces and Content

You can now use API names as a developer-friendly way to identify new enhanced CMS workspaces and CMS content. The API Name field is required when you create a new enhanced CMS workspace. It's not required for content, but if you leave it blank, Salesforce creates an API name for you. In Summer '24, after you save the workspace or content, you can't change its API name.

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

SEE ALSO:

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

[Salesforce Help: Create Content in a CMS Workspace \(can be outdated or unavailable during release preview\)](#)

## Salesforce Flow

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

IN THIS SECTION:

[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 Updates

Use Einstein generative AI to draft a flow. Create better experiences for your users with screen flow enhancements like retrieving information from an autolaunched flow, updating choices in real time, and finding addresses in Google Maps. Work more efficiently with several quality of life enhancements in the Flow Builder UI. Transform collections of data with the Transform element, now generally available. Check for duplicate records before creating new ones.

### Flow Marketing Cloud Updates

Send users to the end of a flow with exit rules. Wait for specific link clicks with the updated Wait Until Event element. Use data graph attributes in exit rules and Decision elements. View detailed flow execution data in new reports. Verify proper flow behavior with the ability to debug segment-triggered flows

### Flow Testing and Debugging

Quickly run through various scenarios for your Data Cloud-triggered flows with tests. Troubleshoot scheduled flows with expanded debug options.

### Flow Runtime

Versioned updates are available for flows and processes that are configured to run on API version 61.0.

### Flow Management

Manage flows in the Automation Lightning app, which is now available to all users. Use new permissions to enable users that don't have the Manage Flows permission to access certain elements. Get more flexibility managing your flows with unlimited paused and waiting flow interviews.

### Flow Actions

Lock and unlock records with an action. Set actions using visible default values and custom placeholder text. Configure a secure MuleSoft connection with all org types and customers. Use threading tokens in emails to link email replies to the right records.

### Flow and Process Release Updates

Salesforce Flow has several release updates that are scheduled to be enforced in future releases.

### Flow Orchestration

Manually suspend a running orchestration. Fix the errors in an orchestration run that failed within the previous 14 days because of a recoverable error, and then resume the orchestration run. See all of your assigned orchestration work items for a record and select the one to complete first.

## 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 Updates

Use Einstein generative AI to draft a flow. Create better experiences for your users with screen flow enhancements like retrieving information from an autolaunched flow, updating choices in real time, and finding addresses in Google Maps. Work more efficiently with several quality of life enhancements in the Flow Builder UI. Transform collections of data with the Transform element, now generally available. Check for duplicate records before creating new ones.

## IN THIS SECTION:

### [Let Einstein Build a Draft Flow for You \(Beta\)](#)

Reach your automation goals with Einstein by describing what you want to automate and letting Einstein generative AI handle the heavy lifting. From the description you provide, Einstein creates a draft screen, record-triggered, schedule-triggered, or autolaunched flow to get you started. Einstein can build a flow using any element and most resources and can even use your org's custom objects. Most Einstein draft flows can have up to six elements. You can help Einstein generative AI gain increased capabilities by providing feedback on your flows.

### [Screen Flow Updates](#)

Help your users easily fill in create multiple instances of the same set of fields. Enable your users to find addresses in the Address flow screen component more quickly with a search field powered by Google Maps. Require user input in the Address screen component. Update choices on a screen in real time.

### [User Experience Updates](#)

Easily find the type of flow or orchestration you want to build with a streamlined creation process. View elements by label instead of API name. Work faster with auto-generated element names. Find resources more efficiently in Collection Filter, Collection Sort, Decision, Loop, Subflows, Recommendation Assignment, and Orchestration Stages and Steps elements.

### [Transform Your Data in Flows \(Generally Available\)](#)

Modify your data into the shape that fits your business process with the new Transform element in Flow Builder. Now generally available, the Transform element includes some changes since the last release. Mapping tips help you avoid errors before you save your flow. Previously, you received errors for the Transform element only when you saved the flow. Also, you can use your keyboard and screen reader to navigate the Transform element more easily. Previously, you couldn't navigate source or target data or hear descriptions about mappings.

### [Configure Conditions More Easily with Is Blank and Is Empty Operators in Flows](#)

Use the Is Blank operator in a condition to check whether a text value contains no characters or only white space. For data type values other than text values, the Is Blank operator checks whether values are null. Previously, you used the Equals operator and the Blank Value (Empty String) global constant. To check whether a collection is empty, use the Is Empty operator. Previously, you added the Assignment and Decision elements to check the collection size.

### [Check for Duplicates Before Creating Records in a Flow](#)

To prevent duplicate records, check for records that match a set of criteria in the Create Records element. Also specify whether to skip or update matching records. If you choose to skip matching records, the flow doesn't create or modify any records. If you choose to update matching records, the flow modifies the records with the values that you provide. Some field-level configurations and validations in your org override the settings in the Create Records element.

### [Reuse Prompt Flows to Boost Efficiency](#)

Now, you can craft a single template-triggered prompt flow and seamlessly apply it across various templates, independent of their prompt template types. An input on the template and the flow must match. Previously, you selected a prompt template type in the flow that generated the associated inputs. Each flow was confined to a specific template that matched its input requirements. You not only build fewer flows but also use each flow more broadly.


## Let Einstein Build a Draft Flow for You (Beta)

Reach your automation goals with Einstein by describing what you want to automate and letting Einstein generative AI handle the heavy lifting. From the description you provide, Einstein creates a draft screen, record-triggered, schedule-triggered, or autolaunched flow to get you started. Einstein can build a flow using any element and most resources and can even use your org's custom objects. Most Einstein draft flows can have up to six elements. You can help Einstein generative AI gain increased capabilities by providing feedback on your flows.

**Where:** This change applies to Lightning Experience.

- All Einstein 1 Editions
- Enterprise, Performance, and Unlimited Editions with the Einstein for Sales, Einstein for Service, or Einstein for Platform add-on.
- Einstein generative AI is available in Lightning Experience.

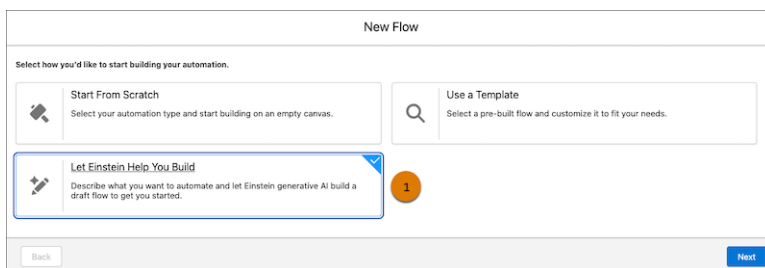
To purchase Einstein for Sales, Einstein for Platform, or Einstein for Service add-ons, contact your Salesforce account executive.

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

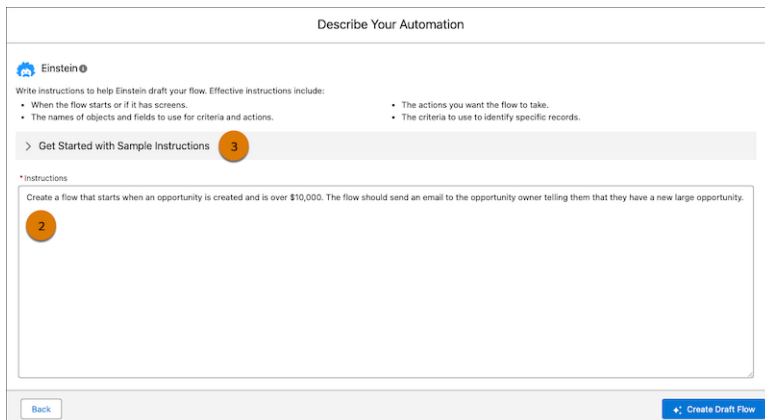
**When:** You can use Einstein to build draft flows (beta) starting on July 16, 2024.

**How:** To enable Einstein for Flow (beta), turn on [Einstein generative AI](#) in Setup. Then, in Setup, find and select **Einstein for Flow (Beta)**, and activate it.

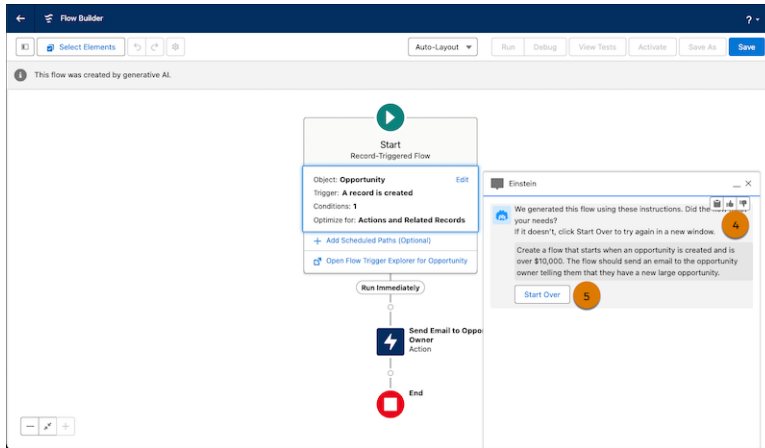
To use Einstein to build flows, from the Flows section in Setup, click **New Flow**, or from the Automation Lightning app, click **New**. Select **Let Einstein Help You Build** (1) and then click **Next**.



Write instructions from scratch (2), or get started with sample instructions (3).



After your draft flow opens in Flow Builder, it's important to check the flow for accuracy and safety. Also, be sure to debug and test the flow before activating. To get increasingly better flows from Einstein, share your feedback in the Einstein window by hovering over the Einstein message and selecting thumbs up or thumbs down (4). If the flow doesn't meet your needs, start over in a new window (5).

**SEE ALSO:**

[Salesforce Help: Let Einstein Help You Build Flows](#) (can be outdated or unavailable during release preview)

[Video: Get to Know Einstein for Flow \(Beta\)](#)

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

## Screen Flow Updates

Help your users easily fill in create multiple instances of the same set of fields. Enable your users to find addresses in the Address flow screen component more quickly with a search field powered by Google Maps. Require user input in the Address screen component. Update choices on a screen in real time.

**IN THIS SECTION:**

[IdeaExchange Delivered: Collect User Input to Build a List of Records from a Screen \(Generally Available\)](#)

Collect information about multiple items of the same type on a screen with the Repeater component. For example, use a Repeater component to gather details about beneficiaries on an insurance policy. Users can add as many beneficiaries as needed on the screen. You can then loop through the list of beneficiaries to create records. This feature, now generally available, includes some changes since the last release. We delivered this feature thanks to your ideas on IdeaExchange.

[IdeaExchange Delivered: Empower Users to Fill in Addresses More Quickly with the New Search Field in the Address Screen Component](#)

Include a search field powered by Google Maps in the Address screen component. When the user selects an address in the search field, the flow populates the address fields. We delivered this feature thanks to your ideas on IdeaExchange.

[IdeaExchange Delivered: Require User Input in the Address Screen Component](#)

Require users to fill in the fields of the Address screen component before navigating to the next screen with the Required field. If you set the Required field to true, a red asterisk appears next to the label of each input fields in the component. We delivered this feature thanks to your ideas on IdeaExchange.

[Update Choices on a Screen in Real Time with Reactive Collection Choice Sets](#)

Screen components that accept Collection Choice Set resources as inputs can now react to changes in other components on the same screen. For example, you can now use the output of a Data Table component to populate a collection choice set resource, and then use that resource to configure a Choice Lookup component on the same screen. Each time a user updates a selection in the Data Table component, the Choice Lookup component reflects the change. Previously, collection choice set resources couldn't react to changes on the same screen.

### Troubleshoot Screen Flows Faster with More Detailed Error Messages

Many runtime error messages in screen flows now include more details to help you troubleshoot issues such as network connection problems, reactivity issues, and exceeded character limits in Lightning web components. Previously, these error messages provided generic troubleshooting recommendations such as `Hmm, that didn't work. Check your internet connection and try again, or refresh the page.` Now the messages include the cause of any errors in addition to the recommendations. For example, when the client sends Salesforce an incompatible navigation action, the resulting error message includes this detail: `Action not available for interview: NEXT.`

### Restrict User Input on Screen Components with the Disabled and Read Only Fields

Use two new fields to specify how users interact with screen components. When the Disabled field is set to true, users can't navigate to or modify any fields in the component. A gray background appears on the input fields in the component to provide users with a visual cue. When the Read Only field is set to true, users can't modify any fields in the component. However, they can navigate to and copy values.

### Update Records Using the State and Country Codes Selected in Address Screen Components

The Address screen component now includes two new fields that store the ISO code for the country or territory and state or province that a user selects. Previously, the Address component stored only the name associated with the user's selection. With this new support for ISO codes, you can update the country or territory and state or province fields on records with ISO codes instead of names.

### Run and Use the Results of an Autolaunched Flow on the Same Screen with the New Action Button Component (Beta)

Add an Action Button component to a flow screen to run and retrieve information from an active autolaunched flow without leaving the screen. The component renders a button that invokes the flow when clicked. For example, create a screen that includes a Lookup component that enables a user to search for and select a Contact record. Add an Action Button component to the screen to launch a flow that retrieves the Account, Case, and Opportunity records associated with the Contact record and populates other fields on the same screen. The user doesn't have to navigate away from the screen to run the flow.

### Other Improvements in Screen Flow Components

Enjoy improved formatting in the Display Text component. Have a better screen reader experience for Long Text Area, Picklist, and Data Table components. See reactive interactions in input-only fields as soon as a screen loads.



## Collect User Input to Build a List of Records from a Screen (Generally Available)

Collect information about multiple items of the same type on a screen with the Repeater component. For example, use a Repeater component to gather details about beneficiaries on an insurance policy. Users can add as many beneficiaries as needed on the screen. You can then loop through the list of beneficiaries to create records. This feature, now generally available, includes some changes since the last release. We delivered this feature thanks to your ideas on IdeaExchange.

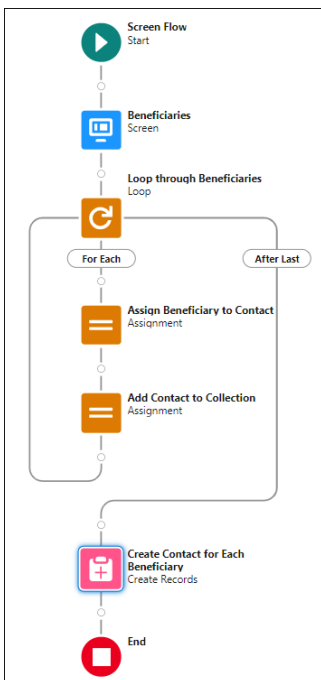
**Where:** This change applies to Lightning Experience and Salesforce Classic in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions. It's not supported in Classic runtime for flows.

**Why:** The Repeater component provides an intuitive interface for building a list and includes these enhancements since the beta release:

- Use custom components and all standard generally available screen components as child components.
- Reference the output of a child component in a different child component in a Repeater component.
- Apply conditional field visibility, input validation, and help text.
- When you debug a flow that includes a Repeater component, view information about the component in the debugger.
- Configure the component to react to user input on the same screen.

**How:** In Flow Builder, open a Screen element and add a Repeater component. Add child components to the Repeater component. For example, add components to collect the first name, last name, date of birth, and relationship for a beneficiary on an insurance policy.

After the Screen element, loop through the Repeater component output and save the list of beneficiaries in a collection variable that you can use elsewhere in the flow. For example, you can use the variable to create a Contact record for each beneficiary.



SEE ALSO:

[Salesforce Help: Flow Screen Component: Repeater \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Flow Example: Create a Contact for Each Beneficiary on a Policy \(can be outdated or unavailable during release preview\)](#)

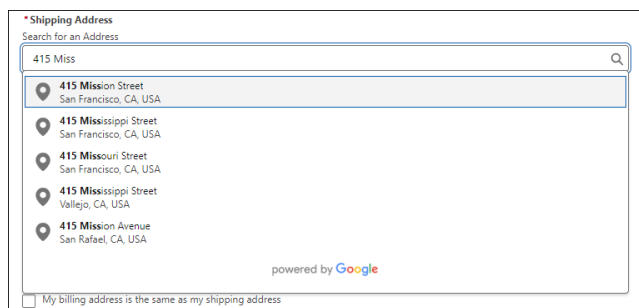


## Empower Users to Fill in Addresses More Quickly with the New Search Field in the Address Screen Component

Include a search field powered by Google Maps in the Address screen component. When the user selects an address in the search field, the flow populates the address fields. We delivered this feature thanks to your ideas on IdeaExchange.

**Where:** This change applies to Lightning Experience and Salesforce Classic in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions. It's not supported in Classic runtime for flows. It's also not supported in Playground, Experience Builder sites, Lightning Out, Lightning Components for Visualforce, and standalone apps.

**How:** In Flow Builder, create a screen flow, add a Screen element to the flow and include an Address component in the Screen element. In the Enable Google Maps Search Field field, enter `{ !$GlobalConstant.True }` or specify a formula resource that evaluates to true. Specify a label for the search field. Save and run the flow.



SEE ALSO:

[Salesforce Help: Flow Screen Component: Address \(can be outdated or unavailable during release preview\)](#)



## Require User Input in the Address Screen Component

Require users to fill in the fields of the Address screen component before navigating to the next screen with the Required field. If you set the Required field to true, a red asterisk appears next to the label of each input fields in the component. We delivered this feature thanks to your ideas on IdeaExchange.

**Where:** This change applies to Lightning Experience and Salesforce Classic in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions. It's not supported in Classic runtime for flows.

**How:** In Flow Builder, create a screen flow, add a Screen element to the flow. Add an Address component to the screen. Set the Required field to a Boolean value such as `{ !$GlobalConstant.True }` or to a formula resource that evaluates to true. Save and run the flow.



\* Shipping Address  
Search for an Address

\* Country  
--None--

\* Street

\* City \* State/Province  
--None--

\* Zip/Postal Code

**SEE ALSO:**

[Salesforce Help: Flow Screen Component: Address \(can be outdated or unavailable during release preview\)](#)

## Update Choices on a Screen in Real Time with Reactive Collection Choice Sets

Screen components that accept Collection Choice Set resources as inputs can now react to changes in other components on the same screen. For example, you can now use the output of a Data Table component to populate a collection choice set resource, and then use that resource to configure a Choice Lookup component on the same screen. Each time a user updates a selection in the Data Table component, the Choice Lookup component reflects the change. Previously, collection choice set resources couldn't react to changes on the same screen.

**Where:** This change applies to Lightning Experience and Salesforce Classic in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions. It's not supported in Classic runtime for flows.

**How:** In Flow Builder, create a screen flow, add a Screen element to the flow, and include a component that populates a collection choice set on the screen. Add a choice component such as a Choice Lookup component to the screen and set the Choice value for the component to the collection choice set. Save and run the flow.

**SEE ALSO:**

[Salesforce Help: Flow Resource: Collection Choice Set \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Make Your Screen Flows Reactive \(can be outdated or unavailable during release preview\)](#)

## Troubleshoot Screen Flows Faster with More Detailed Error Messages

Many runtime error messages in screen flows now include more details to help you troubleshoot issues such as network connection problems, reactivity issues, and exceeded character limits in Lightning web components. Previously, these error messages provided generic troubleshooting recommendations such as `Hmm, that didn't work. Check your internet connection and try again, or refresh the page.` Now the messages include the cause of any errors in addition to the recommendations. For example, when the client sends Salesforce an incompatible navigation action, the resulting error message includes this detail: `Action not available for interview: NEXT.`

**Where:** This change applies to Lightning Experience and Salesforce Classic in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions. It's not supported in Classic runtime for flows.

## Restrict User Input on Screen Components with the Disabled and Read Only Fields

Use two new fields to specify how users interact with screen components. When the Disabled field is set to true, users can't navigate to or modify any fields in the component. A gray background appears on the input fields in the component to provide users with a visual cue. When the Read Only field is set to true, users can't modify any fields in the component. However, they can navigate to and copy values.

**Where:** This change applies to Lightning Experience and Salesforce Classic in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions. It's not supported in Classic runtime for flows.

**How:** In Flow Builder, create a screen flow, add a Screen element to the flow. Include one or more components with the Disabled or Read Only field. Set one or both of the new fields to `{ !$GlobalConstant.True }` or to a formula resource that evaluates to true. Save and run the flow. For example, this image shows a Name component with the Disabled field set to true.



The following table shows which components have the Disabled and Read Only fields.

| Screen Component      | Has Disabled Field | Has Read Only Field |
|-----------------------|--------------------|---------------------|
| Action Button (Beta)  | No                 | Not applicable      |
| Address               | Yes                | No                  |
| Checkbox              | Yes                | Not applicable      |
| Checkbox Group        | Yes                | Not applicable      |
| Choice Lookup         | Yes                | Not applicable      |
| Currency              | Yes                | Yes                 |
| Date                  | Yes                | Yes                 |
| Date & Time           | Yes                | Yes                 |
| Dependent Picklist    | No                 | Not applicable      |
| Email                 | Yes                | Yes                 |
| File Upload           | Yes                | Not applicable      |
| Long Text Area        | Yes                | Yes                 |
| Lookup                | No                 | No                  |
| Multi-Select Picklist | Yes                | Not applicable      |
| Name                  | Yes                | Yes                 |
| Number                | Yes                | Yes                 |
| Password              | Yes                | Yes                 |

| Screen Component | Has Disabled Field | Has Read Only Field |
|------------------|--------------------|---------------------|
| Phone            | No                 | Yes                 |
| Picklist         | Yes                | Not applicable      |
| Radio Buttons    | Yes                | Not applicable      |
| Slider           | No                 | Not applicable      |
| Text             | Yes                | Yes                 |
| Toggle           | Yes                | Not applicable      |
| URL              | Yes                | Yes                 |

## Update Records Using the State and Country Codes Selected in Address Screen Components

The Address screen component now includes two new fields that store the ISO code for the country or territory and state or province that a user selects. Previously, the Address component stored only the name associated with the user's selection. With this new support for ISO codes, you can update the country or territory and state or province fields on records with ISO codes instead of names.

**Where:** This change applies to Lightning Experience and Salesforce Classic in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions. It's not supported in Classic runtime for flows.

**How:** In Setup, on the State and Country/Territory Picklists page, ensure that Enable Picklists for Address Fields is enabled. In Flow Builder, create a screen flow, add a Screen element to the flow and include an Address component in the Screen element. Optionally, specify a default value in the Country Code and State or Province Code fields. Save and run the flow. Later in the flow, use the StateCode and CountryCode values to update or create records.

### SEE ALSO:

[Salesforce Help: Flow Screen Component: Address \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Enable and Disable State and Country/Territory Picklists \(can be outdated or unavailable during release preview\)](#)

## Run and Use the Results of an Autolaunched Flow on the Same Screen with the New Action Button Component (Beta)

Add an Action Button component to a flow screen to run and retrieve information from an active autolaunched flow without leaving the screen. The component renders a button that invokes the flow when clicked. For example, create a screen that includes a Lookup component that enables a user to search for and select a Contact record. Add an Action Button component to the screen to launch a flow that retrieves the Account, Case, and Opportunity records associated with the Contact record and populates other fields on the same screen. The user doesn't have to navigate away from the screen to run 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](#).

(In case the "Agreements and Terms" link doesn't work when you copy and paste into Oxygen, it's <https://www.salesforce.com/company/legal/agreements/>)

**Where:** This change applies to Lightning Experience and Salesforce Classic in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions. It's not supported in Classic runtime for flows.

**How:** In Flow Builder, create and activate an autolaunched flow that retrieves data and saves data as one or more outputs that you can reference later in the flow. Then, create a screen flow, add a Screen element to the flow, and include an Action Button on the screen. Configure the Action Button component to launch the autolaunched flow that you previously created. Add another element to the screen that ingests the data you retrieve with the Action Button component. Save and run the flow.

The screenshot shows a Salesforce screen flow interface. At the top, there is a search bar labeled "Search Accounts..." with a magnifying glass icon. Below the search bar, there is a blue button labeled "Global Media" with an 'X' icon to its right. Underneath that is another button labeled "Get Opportunities & Contacts". The main content area is titled "Contacts on Selected Accounts" and shows "3 of 3 items • 0 items selected". Below this is a table with three columns: "Full Name", "Email", and "Mailing Address". Each row has a checkbox on the left. The data in the table is as follows:

| <input type="checkbox"/> | Full Name    | Email               | Mailing Address                                   |
|--------------------------|--------------|---------------------|---------------------------------------------------|
| <input type="checkbox"/> | Geoff Minor  | info@salesforce.com | 150 Chestnut Street<br>Toronto, L4B 1Y3<br>Canada |
| <input type="checkbox"/> | Carole White | info@salesforce.com | 150 Chestnut Street<br>Toronto, L4B 1Y3<br>Canada |
| <input type="checkbox"/> | Jon Amos     | info@salesforce.com | 150 Chestnut Street<br>Toronto, L4B 1Y3<br>Canada |

### SEE ALSO:

[Salesforce Help: Flow Screen Component: Action Button \(Beta\) \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Flow Example: Retrieve Opportunities for an Account that a User Selects \(can be outdated or unavailable during release preview\)](#)

## Other Improvements in Screen Flow Components

Enjoy improved formatting in the Display Text component. Have a better screen reader experience for Long Text Area, Picklist, and Data Table components. See reactive interactions in input-only fields as soon as a screen loads.

**Where:** These changes apply to Lightning Experience and Salesforce Classic in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions. They're supported only in Lightning runtime for flows.

**Why:** Screen flow users can now:

- See improved formatting when you reference Action Button or Data Table component outputs in Display Text components. Specifically, the Display Text component now renders Decimal and Date record variable outputs with the correct formatting. Currency values are still rendered without a currency symbol. To avoid this issue, wrap the reference in a formula.

- Have screen readers announce the label of Long Text Area and Picklist components when focusing on them. Previously, screen readers didn't announce these labels.
- Have screen readers announce when no items are selected in a Data Table component.

## User Experience Updates

Easily find the type of flow or orchestration you want to build with a streamlined creation process. View elements by label instead of API name. Work faster with auto-generated element names. Find resources more efficiently in Collection Filter, Collection Sort, Decision, Loop, Subflows, Recommendation Assignment, and Orchestration Stages and Steps elements.

### IN THIS SECTION:

#### [Find the Type of Automation to Build with Ease](#)

Now it's easier to find the type of flow or orchestration you want to build. Instead of scrolling through all types and templates in one window, you're prompted to decide whether you want to start from scratch or use a template. The next window shows only relevant information, based on what you selected on the previous window. For example, if you select the option to use a template, the next window lists only templates. Also, you can now search for templates.

#### [View Your Elements by Label in the Flow Builder Toolbox](#)

Elements are now listed in the Flow Builder toolbox by their label instead of by their API name. This change unifies the label-first user experience across Flow Builder. You can view the API name by hovering over a tooltip next to the element. You can now search for an element by its label or by its API name.

#### [Build Flows More Easily with Auto-Generated Element Names](#)

Now when you add an element to your flow while in Auto-Layout mode, a value in the Label is generated automatically. We also select that label so you can easily edit the generated value. This change applies to all elements except Screens. For Decision and Wait elements, paths are also named automatically. We also updated the panel headings to be consistent across elements when editing.

#### [Find and Select Flow Resources More Easily in More Elements](#)

With this update, Flow Builder extends enhanced resource selection to the Collection Filter, Collection Sort, Decision, Loop, Subflows, Recommendation Assignment, and Orchestration Stages and Steps elements. It's also available in Actions that don't have custom property editors. This enhanced selection is available only where an expression builder isn't present with the exception of the Decision element. Additional improvements include displaying resources by their labels and displaying icons that are more intuitive. There's also a new tooltip to provide more details for the resource such as data type and description. All of these improvements make it easier for you to more quickly discover the resources that you need.

#### [Use the Enhanced Action and Subflow Panel in Flow Builder](#)

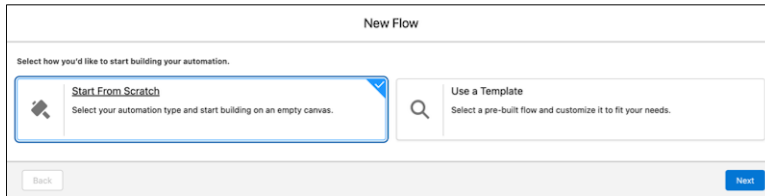
Flow Builder Action and Subflow panels now replace the existing Flow Builder Action and Subflow window for browsing, selecting, and configuring invocable actions and creating HTTP Callout actions. Easily use the search bar functionality to browse by Category and Custom Action Type.

## Find the Type of Automation to Build with Ease

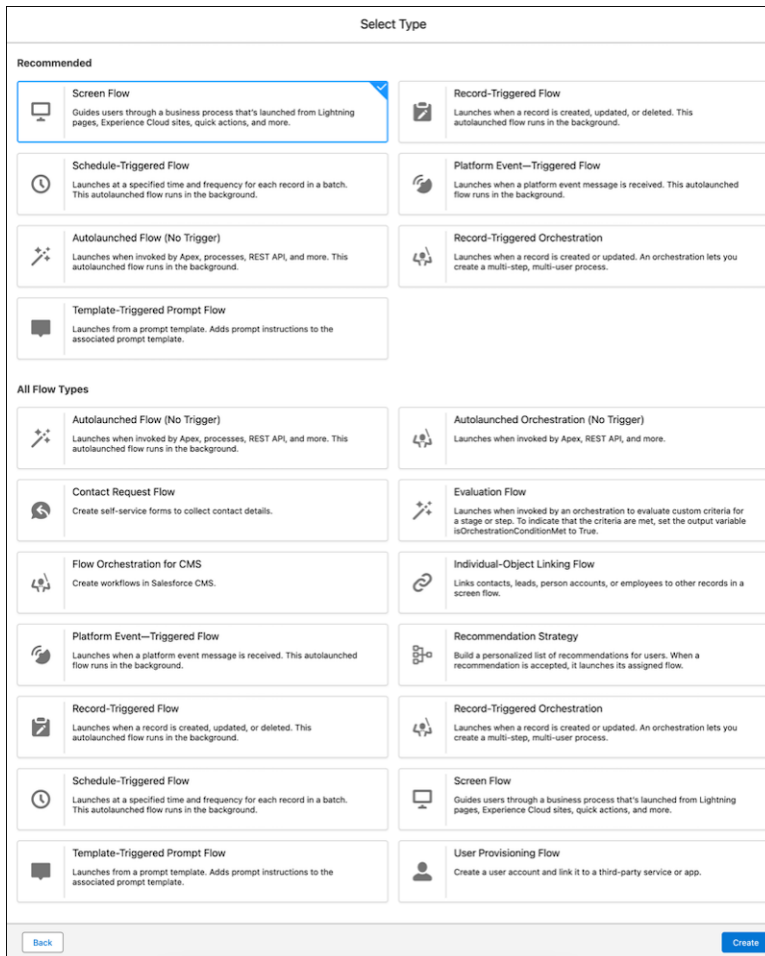
Now it's easier to find the type of flow or orchestration you want to build. Instead of scrolling through all types and templates in one window, you're prompted to decide whether you want to start from scratch or use a template. The next window shows only relevant information, based on what you selected on the previous window. For example, if you select the option to use a template, the next window lists only templates. Also, you can now search for templates.

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

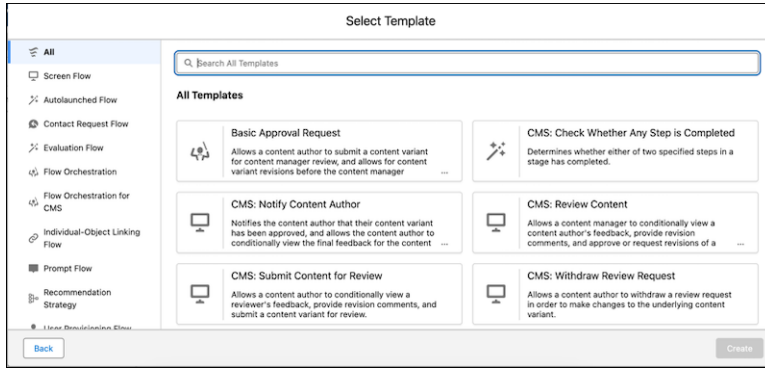
**How:** From the Flows section in Setup, click **New Flow**, or from the Automation Lightning app, click **New**. Select the type of automation you want to build, then click **Next**.



If the selected automation type is Start From Scratch, the next window shows flows and orchestrations.



If the selected automation type is Use a Template, the next window shows templates. Search for your template to find it faster.



SEE ALSO:

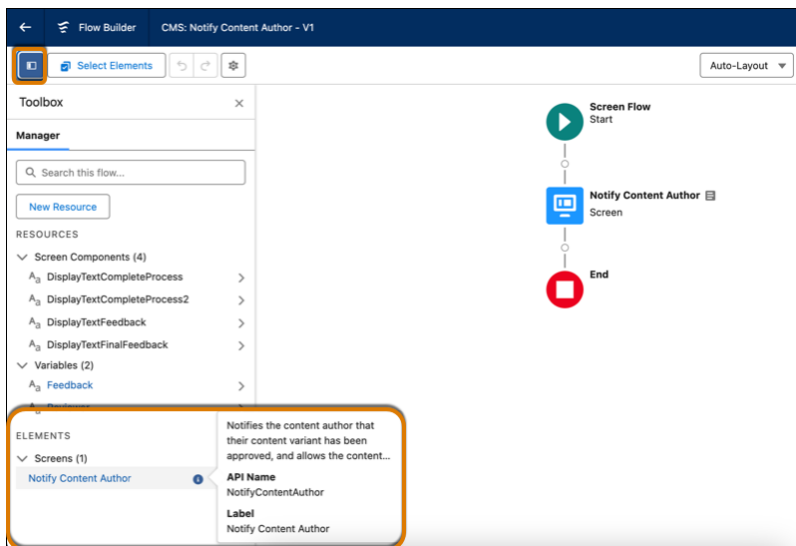
[Salesforce Help: Flow Types \(can be outdated or unavailable during release preview\)](#)

## View Your Elements by Label in the Flow Builder Toolbox

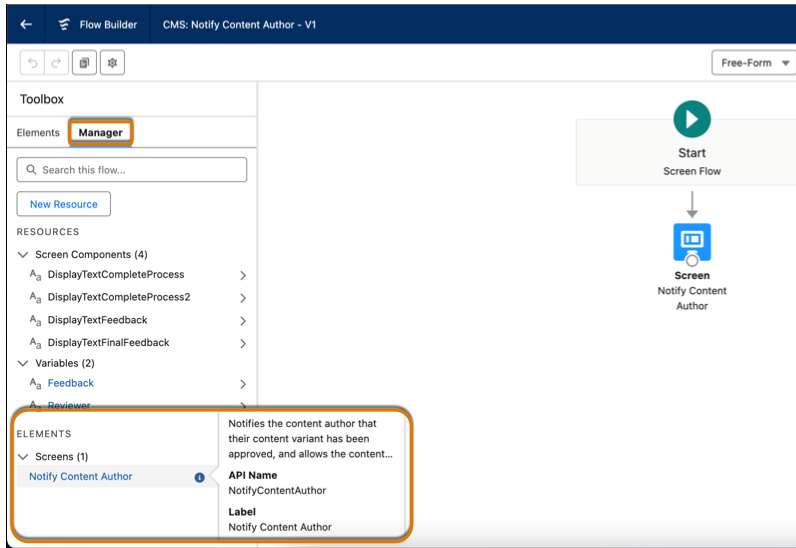
Elements are now listed in the Flow Builder toolbox by their label instead of by their API name. This change unifies the label-first user experience across Flow Builder. You can view the API name by hovering over a tooltip next to the element. You can now search for an element by its label or by its API name.

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

**How:** From the Flow Builder canvas in Auto-Layout, click **Toolbox** and scroll down to view your element. Hover over the tooltip icon to see the element's description, API name, and label.



From the Flow Builder canvas in Free-Form, click **Toolbox**, then click **Manager**. Scroll down to view your element. Hover over the tooltip icon to see the element's description, API name, and label.



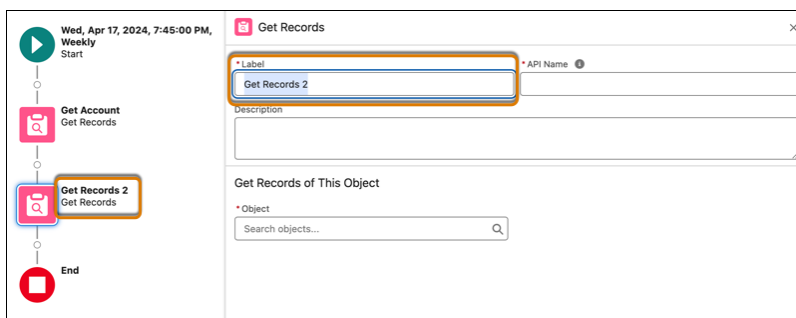
## Build Flows More Easily with Auto-Generated Element Names

Now when you add an element to your flow while in Auto-Layout mode, a value in the Label is generated automatically. We also select that label so you can easily edit the generated value. This change applies to all elements except Screens. For Decision and Wait elements, paths are also named automatically. We also updated the panel headings to be consistent across elements when editing.

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

**Why:** To streamline the process of naming elements, we pre-populate the Label field to ensure that names are consistent and unique across your flow.

**How:** From the canvas in Auto-Layout mode, add an element to your flow. The Label is automatically generated and selected.



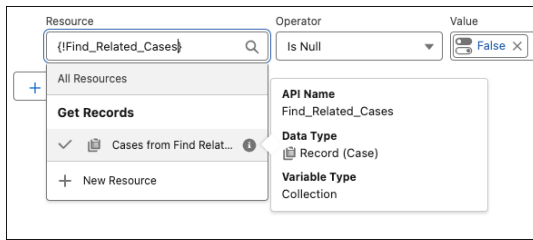
## Find and Select Flow Resources More Easily in More Elements

With this update, Flow Builder extends enhanced resource selection to the Collection Filter, Collection Sort, Decision, Loop, Subflows, Recommendation Assignment, and Orchestration Stages and Steps elements. It's also available in Actions that don't have custom property editors. This enhanced selection is available only where an expression builder isn't present with the exception of the Decision element. Additional improvements include displaying resources by their labels and displaying icons that are more intuitive. There's also a new tooltip to provide more details for the resource such as data type and description. All of these improvements make it easier for you to more quickly discover the resources that you need.

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



**How:** Open an existing flow, select an element, and then click **Edit Element**. Click in a resource field. Resource grouping now displays automatic outputs and variables with user-friendly labels under the elements in which they're created.



Previously, you could search for a screen component by its name without having to drill into the specific screen. Now, you must select the screen it was created from first. If you're unsure on which screen it was created, go to the Toolbox, click **Manager**, and search for the screen component. Click **>** to view in which Screen the component is used. This change in searching also impacts other nested entities like Decision outcomes, Wait events, and Orchestration Steps.



## Use the Enhanced Action and Subflow Panel in Flow Builder

Flow Builder Action and Subflow panels now replace the existing Flow Builder Action and Subflow window for browsing, selecting, and configuring invocable actions and creating HTTP Callout actions. Easily use the search bar functionality to browse by Category and Custom Action Type.


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

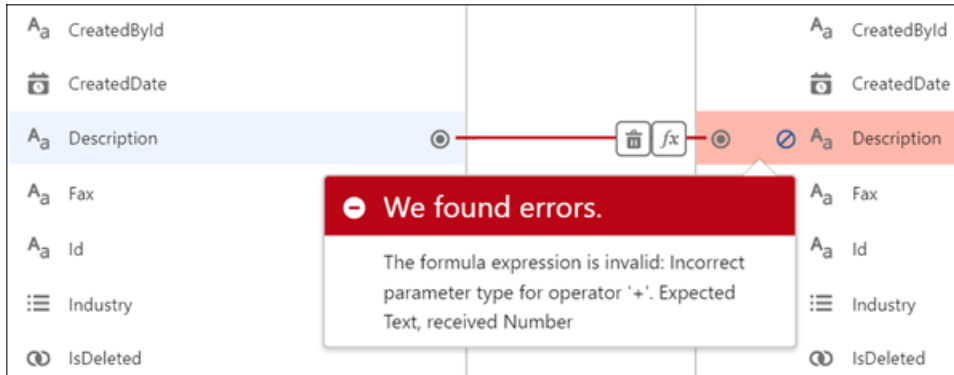
**How:** Click the add element icon from the open flow canvas. Choose between adding an Action or Subflow and begin your process.

## Transform Your Data in Flows (Generally Available)

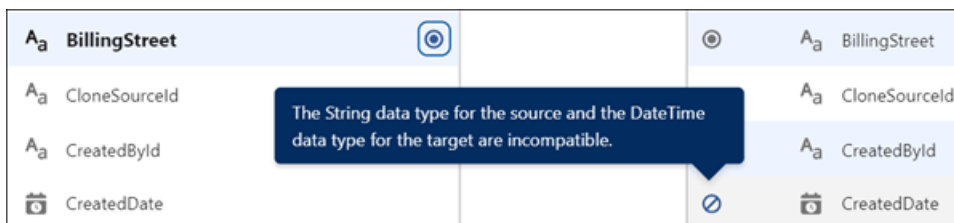
Modify your data into the shape that fits your business process with the new Transform element in Flow Builder. Now generally available, the Transform element includes some changes since the last release. Mapping tips help you avoid errors before you save your flow. Previously, you received errors for the Transform element only when you saved the flow. Also, you can use your keyboard and screen reader to navigate the Transform element more easily. Previously, you couldn't navigate source or target data or hear descriptions about mappings.

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

**How:** To view a mapping tip of a misconfiguration error, hover over the error icon  shown next to a target data field or collection when you configure the Transform element in Flow Builder.



To view a mapping tip next to a target field or collection that's unavailable for mapping, hover over the space next to the target field or collection.



SEE ALSO:

[Video: Transform Your Data with Flow Builder \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Transform Data in a Flow \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Flow Builder Tour \(can be outdated or unavailable during release preview\)](#)

## Configure Conditions More Easily with Is Blank and Is Empty Operators in Flows

Use the Is Blank operator in a condition to check whether a text value contains no characters or only white space. For data type values other than text values, the Is Blank operator checks whether values are null. Previously, you used the Equals operator and the Blank Value (Empty String) global constant. To check whether a collection is empty, use the Is Empty operator. Previously, you added the Assignment and Decision elements to check the collection size.

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

**How:** Add one of these elements to your flow: Decision, Wait for Conditions, or Collection Filter. To configure a condition in the element, enter a resource that references a value. Select the **Is Blank** operator. Enter a resource that references a collection. And then select the **Is Empty** operator.

Resource: Aa ...from get contact > Account ID X  
 Operator: Is Blank  
 Value: True X

SEE ALSO:

[Salesforce Help: Flow Operators in Decision and Wait Elements \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Flow Operators in Data Elements and Record Choice Sets \(can be outdated or unavailable during release preview\)](#)

## Check for Duplicates Before Creating Records in a Flow

To prevent duplicate records, check for records that match a set of criteria in the Create Records element. Also specify whether to skip or update matching records. If you choose to skip matching records, the flow doesn't create or modify any records. If you choose to update matching records, the flow modifies the records with the values that you provide. Some field-level configurations and validations in your org override the settings in the Create Records element.

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

**How:** In Flow Builder, create a flow that includes a Create Records element. In the Create Records pane, enable **Check for Matching Records**. Add one or more conditions. Select whether to update or skip matching records. Save the flow.

Check for Matching Records Enabled

To prevent duplicate records, check for records that match these criteria and specify what happens when matching records are found. Some field-level configurations and validations in your org override this setting.

Condition Requirements  
 All Conditions Are Met (AND)

| Field | Operator | Value                          |
|-------|----------|--------------------------------|
| Id    | Equals   | Accountid from Create_Recor... |

+ Add Condition

If a single matching record exists:  
 Update the matching record  
 Skip the matching record

If multiple matching records exist:  
 Update the most recently modified matching record  
 Skip all matching records

SEE ALSO:

[Salesforce Help: Flow Element: Create Records \(can be outdated or unavailable during release preview\)](#)

## Reuse Prompt Flows to Boost Efficiency

Now, you can craft a single template-triggered prompt flow and seamlessly apply it across various templates, independent of their prompt template types. An input on the template and the flow must match. Previously, you selected a prompt template type in the flow that generated the associated inputs. Each flow was confined to a specific template that matched its input requirements. You not only build fewer flows but also use each flow more broadly.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions. Einstein generative AI is available in Lightning Experience.

**How:** Choose to either use automatic inputs based on the selected prompt template type or manually configure inputs. Consider the convenience of handling open cases for an Account across different departments using the same prompt flow. For example, a Field Generation template that requires an input for an account, and a Record Summary template that needs an account input can now use the same underlying flow.

## Select Input Type

Select how to provide input to this flow from the prompt template.

**Manual Inputs**

Manually create input variables to store prompt template information.

**Automatic Inputs**

Use the inputs provided by a specified prompt template type to store prompt template information.

When you configure manual inputs, you can significantly decrease the time spent on creating and managing multiple prompt flows.

SEE ALSO:

[Salesforce Help: Example of Reusable Template-Triggered Prompt Flow \(can be outdated or unavailable during release preview\)](#)

## Flow Marketing Cloud Updates

Send users to the end of a flow with exit rules. Wait for specific link clicks with the updated Wait Until Event element. Use data graph attributes in exit rules and Decision elements. View detailed flow execution data in new reports. Verify proper flow behavior with the ability to debug segment-triggered flows

IN THIS SECTION:

### [End a Flow for a User at Any Point with Exit Rules](#)

Create up to 10 rules in a segment triggered flow that specify when to end the execution of a flow for a user. For example, create a rule that removes users who switch job roles. Since a user's circumstances can change over time, exit rules can be especially useful for long-running flows with Wait elements. Each exit rule contains one or more conditions, which act like filters to remove users. Conditions are based on global attributes of the flow or Data Cloud data graph attributes, related attributes, or calculated insights.

### [Wait for Specific Link Clicks with the Wait Until Event Element](#)

The Wait Until Event element is updated with the ability to wait until a specific link in an email or SMS is clicked.

### [Access Data Graph Attributes in Your Campaign Flows](#)

In segment triggered flows, use Data Cloud data graph attributes to create conditions in exit rules and Decision elements. A data graph is a collection of fields from existing Data Cloud data model objects that you group for fast access.

### [View Detailed Flow Execution Data](#)

Analyze flow data from your segment-triggered flows in a report that aggregates flow run or flow element results by the triggering individual. For example, get insights into which decision outcome paths were taken, flow exits, and when flows were triggered.

### [Debug Segment-Triggered Flows](#)

Test the behavior of your segment-triggered flows with the debug tool in Flow Builder.

### Package Segment and Form-Triggered Flow Templates

Package segment and form-triggered flows that are in a draft status so that your users can use those flows as templates for their own flows.

SEE ALSO:

[Get More Done with Updated Flow Functionality](#)

## End a Flow for a User at Any Point with Exit Rules

Create up to 10 rules in a segment triggered flow that specify when to end the execution of a flow for a user. For example, create a rule that removes users who switch job roles. Since a user's circumstances can change over time, exit rules can be especially useful for long-running flows with Wait elements. Each exit rule contains one or more conditions, which act like filters to remove users. Conditions are based on global attributes of the flow or Data Cloud data graph attributes, related attributes, or calculated insights.

**Where:** This feature is available in Lightning Experience for Salesforce Enterprise and Unlimited editions with Marketing Cloud Growth edition.

**How:** In Flow Builder, open a segment triggered flow. In the Start node, click **Edit** next to the count of exit rules. Click **Add Exit Rule**. Configure one or more conditions in the rule. Save your work. The flow evaluates the exit rules each time a user starts a flow, resumes a flow after a pause, or invokes an action.


The screenshot shows the 'Exit Rules' configuration window. At the top, there's a red square icon and the title 'Exit Rules'. Below that, a dropdown menu is expanded to show 'Campaign Expiration'. Underneath, there are two input fields: 'Label' with the value 'Campaign Expiration' and 'API Name' with the value 'Campaign\_Expiration'. Below these is a dropdown menu for 'End Flow for User When' set to 'All Conditions Are Met (AND)'. The main configuration area has three columns: 'Resource', 'Operator', and 'Value'. The 'Resource' field contains 'Running Flow Interview > CurrentDate', the 'Operator' is 'Equals', and the 'Value' is '4/9/2024'. There are search and delete icons next to the value field. At the bottom, there are two buttons: '+ Add Condition' and '+ Add Exit Rule'.

## Wait for Specific Link Clicks with the Wait Until Event Element

The Wait Until Event element is updated with the ability to wait until a specific link in an email or SMS is clicked.

**Where:** This feature is available in Lightning Experience for Salesforce Enterprise and Unlimited editions with Marketing Cloud Growth edition.

**How:** In Flow Builder, add the Wait Until Event element to the canvas. If the selected email or SMS contains links, you can select which specific link to wait for.

 Wait Until Event
✕

---

**\* Label**

**\* API Name** ⓘ

Description

---

▼ Select What to Monitor


**\* Object**

---

▼ When to Resume the Flow

Select the flow action and user interaction that resumes the flow.

**\* Flow Action to Monitor**

 Send Email Message Action 1 ✕

**\* Content Interaction**

**\* Link**

Any Link

<https://trailhead.salesforce.com/>

<https://www.salesforce.com>

<https://help.salesforce.com/>

---

**\* Amount of Time** ⓘ

− 1 +

## Access Data Graph Attributes in Your Campaign Flows

In segment triggered flows, use Data Cloud data graph attributes to create conditions in exit rules and Decision elements. A data graph is a collection of fields from existing Data Cloud data model objects that you group for fast access.

**Where:** This feature is available in Lightning Experience for Salesforce Enterprise and Unlimited editions with Marketing Cloud Growth edition.

**How:** In Flow Builder, create a segment triggered flow that includes an exit rule or a Decision element. In the configuration pane for the exit rule or Decision element, select a data graph field as the Resource in a condition. Finish configuring the flow, and save your work.

## View Detailed Flow Execution Data

Analyze flow data from your segment-triggered flows in a report that aggregates flow run or flow element results by the triggering individual. For example, get insights into which decision outcome paths were taken, flow exits, and when flows were triggered.

**Where:** This feature is available in Lightning Experience for Salesforce Enterprise and Unlimited editions with Marketing Cloud Growth edition.

**How:** On the Reports tab, click **New Report**. In the Flow category, select the Flow History by Individual report to create a report to view the overall result of each flow per triggering individual. Select Flow Run Details by Individual to see a flow's results broken down by each individual element in the flow.

|    | Flow Name                    | Flow Version Number | Flow Element Name | Flow Element Run Status | Individual Person Name | Error Reason | Flow Element      | Data Source                                                 |
|----|------------------------------|---------------------|-------------------|-------------------------|------------------------|--------------|-------------------|-------------------------------------------------------------|
| 1  | ora14 250 code segment Flow1 | 1                   | send_email        | Completed               | John Gardner           | -            | 11MOL0000000012AA | dc_flow_sdb3_Flow_Runs_caa52ecb_54eb_4614_8c02_18316a9ebe1f |
| 2  | ora14 250 code segment Flow1 | 1                   | send_email        | Completed               | Jon Amos               | -            | 11MOL0000000012AA | dc_flow_sdb3_Flow_Runs_caa52ecb_54eb_4614_8c02_18316a9ebe1f |
| 3  | ora14 250 code segment Flow1 | 1                   | send_email        | Completed               | Andy Smith             | -            | 11MOL0000000012AA | dc_flow_sdb3_Flow_Runs_caa52ecb_54eb_4614_8c02_18316a9ebe1f |
| 4  | ora14 250 code segment Flow1 | 1                   | send_email        | Completed               | Carole White           | -            | 11MOL0000000012AA | dc_flow_sdb3_Flow_Runs_caa52ecb_54eb_4614_8c02_18316a9ebe1f |
| 5  | ora14 250 code segment Flow1 | 1                   | send_email        | Completed               | Edward Stamos          | -            | 11MOL0000000012AA | dc_flow_sdb3_Flow_Runs_caa52ecb_54eb_4614_8c02_18316a9ebe1f |
| 6  | ora14 250 code segment Flow1 | 1                   | send_email        | Completed               | Leanne Tomlin          | -            | 11MOL0000000012AA | dc_flow_sdb3_Flow_Runs_caa52ecb_54eb_4614_8c02_18316a9ebe1f |
| 7  | ora14 250 code segment Flow1 | 1                   | send_email        | Completed               | Howard Jones           | -            | 11MOL0000000012AA | dc_flow_sdb3_Flow_Runs_caa52ecb_54eb_4614_8c02_18316a9ebe1f |
| 8  | ora14 250 code segment Flow1 | 1                   | send_email        | Completed               | Marc Bernioff          | -            | 11MOL0000000012AA | dc_flow_sdb3_Flow_Runs_caa52ecb_54eb_4614_8c02_18316a9ebe1f |
| 9  | ora14 250 code segment Flow1 | 1                   | send_email        | Completed               | Sarah Loehr            | -            | 11MOL0000000012AA | dc_flow_sdb3_Flow_Runs_caa52ecb_54eb_4614_8c02_18316a9ebe1f |
| 10 | ora14 250 code segment Flow1 | 1                   | send_email        | Completed               | Jim Steele             | -            | 11MOL0000000012AA | dc_flow_sdb3_Flow_Runs_caa52ecb_54eb_4614_8c02_18316a9ebe1f |
| 11 | ora14 250 code segment Flow1 | 1                   | send_email        | Completed               | Geoff Minor            | -            | 11MOL0000000012AA | dc_flow_sdb3_Flow_Runs_caa52ecb_54eb_4614_8c02_18316a9ebe1f |
| 12 | ora14 250 code segment Flow1 | 1                   | send_email        | Completed               | Howard Jones           | -            | 11MOL0000000012AA | dc_flow_sdb3_Flow_Runs_caa52ecb_54eb_4614_8c02_18316a9ebe1f |
| 13 | ora14 250 code segment Flow1 | 1                   | send_email        | Completed               | Carole White           | -            | 11MOL0000000012AA | dc_flow_sdb3_Flow_Runs_caa52ecb_54eb_4614_8c02_18316a9ebe1f |
| 14 | ora14 250 code segment Flow1 | 1                   | send_email        | Completed               | Geoff Minor            | -            | 11MOL0000000012AA | dc_flow_sdb3_Flow_Runs_caa52ecb_54eb_4614_8c02_18316a9ebe1f |
| 15 | ora14 250 code segment Flow1 | 1                   | send_email        | Completed               | Marc Bernioff          | -            | 11MOL0000000012AA | dc_flow_sdb3_Flow_Runs_caa52ecb_54eb_4614_8c02_18316a9ebe1f |
| 16 | ora14 250 code segment Flow1 | 1                   | send_email        | Completed               | Andy Smith             | -            | 11MOL0000000012AA | dc_flow_sdb3_Flow_Runs_caa52ecb_54eb_4614_8c02_18316a9ebe1f |
| 17 | ora14 250 code segment Flow1 | 1                   | send_email        | Completed               | Sarah Loehr            | -            | 11MOL0000000012AA | dc_flow_sdb3_Flow_Runs_caa52ecb_54eb_4614_8c02_18316a9ebe1f |

## Debug Segment-Triggered Flows

Test the behavior of your segment-triggered flows with the debug tool in Flow Builder.

**Where:** This feature is available in Lightning Experience for Salesforce Enterprise and Unlimited editions with Marketing Cloud Growth edition.

**How:** In Flow Builder, click **Debug** to debug your flow.

SEE ALSO:

[Salesforce Help: Debug a Flow in Flow Builder \(can be outdated or unavailable during release preview\)](#)

## Package Segment and Form-Triggered Flow Templates

Package segment and form-triggered flows that are in a draft status so that your users can use those flows as templates for their own flows.

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

## Flow Testing and Debugging

Quickly run through various scenarios for your Data Cloud-triggered flows with tests. Troubleshoot scheduled flows with expanded debug options.

### IN THIS SECTION:

#### [Run Tests for Data Cloud-Triggered Flows](#)

Create and manage specific scenarios to test your Data Cloud-triggered flows. With tests, you can quickly verify that your flow is behaving as intended without having to manually configure debug parameters for each debug run.

#### [Debug Scheduled Flows More Successfully](#)

New options are available when debugging scheduled flows. You can skip the start condition requirements for the flow. You're no longer restricted to using the first available record to debug. Instead, you select the specific record on which to run. You can also test multiple scenarios by selecting different triggering records to see whether a record runs.

## Run Tests for Data Cloud-Triggered Flows

Create and manage specific scenarios to test your Data Cloud-triggered flows. With tests, you can quickly verify that your flow is behaving as intended without having to manually configure debug parameters for each debug run.

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

**How:** In Flow Builder, click **View Tests** to create and manage tests.

### Edit Test

Set Test Details, Trigger, and Path

[Set Initial Triggering Record](#)

Set Updated Triggering Record

Set Assertions

**Set Initial Triggering Record**

Set the initial values for the record that triggers the test. If you convert the debug run to a test, the values are set from the debug run's triggering record. After the test finishes, all transactions are rolled back, and record changes aren't saved.

**Birth Date**

Date  Time

First Name

**Last Modified Date**

Date  Time

Person Name

Salutation

**Created Date**

Date  Time

Unified Individual Id

Last Name

Photo URL

### SEE ALSO:

[Salesforce Help: Testing Your Flow](#) (can be outdated or unavailable during release preview)



## Debug Scheduled Flows More Successfully

New options are available when debugging scheduled flows. You can skip the start condition requirements for the flow. You're no longer restricted to using the first available record to debug. Instead, you select the specific record on which to run. You can also test multiple scenarios by selecting different triggering records to see whether a record runs.

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

**Why:** Because scheduled flow debugging automatically used the first available record as input, it can lead to inaccurate results or failures when you're debugging. This new flexibility can also help to identify potential performance issues.

**How:** From Setup, in the Quick Find box, enter *Flows*, and then select **Flows**. From your Flow list, open a scheduled flow. Click **Debug**. Select your debug options and the triggering record from the list. Click **Run**. The debug executes.



The screenshot shows a "Debug flow" dialog box. It contains the following elements:

- Debug Options:**
  - Skip start condition requirements ⓘ
  - Debug pause element behavior
  - Run flow in rollback mode
- Select a Record:**
  - The selected record is used to debug this flow.
  - Account\*
  - Search Accounts... (with a magnifying glass icon)
- Buttons:** Cancel and Run (highlighted in blue).

When completed, the Debug Details panel shows the ID of the record on which the debug operation ran (1) and the number of records impacted when the scheduled flow is triggered (2).

The screenshot displays two sections of the 'Debug Details' window. The top section, titled 'How the Interview Started', shows the flow's execution context, including the record ID: '\$Record = Account (001SG00000NRKtRYAX)'. This text is highlighted with an orange box and a red circle containing the number '1'. The bottom section, titled 'Affected Records', shows the result of a 'Get Records' step: 'this flow impacts 2 records.' This text is also highlighted with an orange box and a red circle containing the number '2'.

## Flow Runtime

Versioned updates are available for flows and processes that are configured to run on API version 61.0.

IN THIS SECTION:

[Flow and Process Run-Time Changes in API Version 61.0](#)

These updates affect only flows and processes that are configured to run on API version 61.0 or later.

### Flow and Process Run-Time Changes in API Version 61.0

These updates affect only flows and processes that are configured to run on API version 61.0 or later.

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

**How:** With versioned updates you can test and adopt run-time behavior changes for individual flows and processes at your convenience. To change the run-time API version of a flow, open it in Flow Builder and edit the flow version properties. To change the run-time API version of a process, open it in Process Builder and edit its properties.

### **Run the Active Instead of the Latest Version of Subflows**

This versioned update enables screen flows to call the active version of any subflows. Previously, a screen flow called the latest version of a subflow regardless of whether it was also the active version.

### **Fields Available Only for Input in Screen Flow Components Are Reactive When the Screen Loads**

This versioned update ensures that input-only fields such as the Source Collection field of the Data Table component are reactive the first time a screen loads. This change also ensures that any Lightning web components configured to provide data to other components on the same screen do so when the screen loads.

### **Screen Component Conditional Visibility Works With Choice Values Using Display Text Input**

This versioned update ensures that component conditional visibility works as expected when a conditional visibility condition depends on a choice value that uses display text input.

## Flow Management

Manage flows in the Automation Lightning app, which is now available to all users. Use new permissions to enable users that don't have the Manage Flows permission to access certain elements. Get more flexibility managing your flows with unlimited paused and waiting flow interviews.

### IN THIS SECTION:

#### [Manage Your Flows More Efficiently with the Automation Lightning App](#)

View and monitor your flows in the Automation Lightning app, which is now available to all flow admins and other users that you grant access to. From the app, you can create flows or open any flow that you have permission to access in Flow Builder. New list views show your most recently modified flows and flow definitions that include errors. Search for flows using a keyword in the flow label. Filter or sort flows by type, progress status, last modified date, last modifying user, and associated record fields. Additionally, find a direct link to the Trailblazer Community and to relevant learning material on Trailhead.

#### [Fine-Tune Access to Elements in Flow Builder](#)

Use new permissions to enable users that don't have the Manage Flows permission to access the Assignment, Collection Filter, Collection Sort, Delete Records, Get Records, Loop, and Subflow elements in segment-triggered and form-triggered flows.

#### [Have Unlimited Paused and Waiting Flows](#)

We've removed the per-org usage-based limit for paused and waiting flow interviews. While there's no limit now for paused and waiting flow interviews, the number of paused and waiting flows can still be limited by the amount of storage available to your org. If you need more storage, call your Salesforce account rep.

#### [Organize Your Flows Based on Categories and Subcategories That You Define](#)

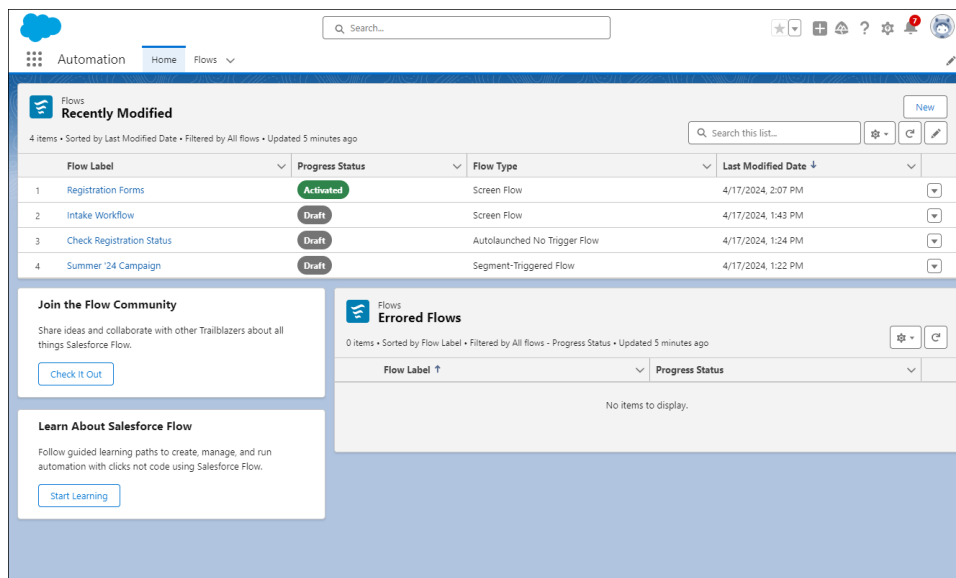
Group your flows into categories and subcategories with two new fields on the flow record Details page. Use these fields to create custom list views of your flows in the Automation Lightning app.

## Manage Your Flows More Efficiently with the Automation Lightning App

View and monitor your flows in the Automation Lightning app, which is now available to all flow admins and other users that you grant access to. From the app, you can create flows or open any flow that you have permission to access in Flow Builder. New list views show your most recently modified flows and flow definitions that include errors. Search for flows using a keyword in the flow label. Filter or sort flows by type, progress status, last modified date, last modifying user, and associated record fields. Additionally, find a direct link to the Trailblazer Community and to relevant learning material on Trailhead.

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

**How:** In the App Launcher, search for Automation and select the Automation app. If you don't see the app, go to Process Automation Settings in Setup, and select **Enable the Automation Lightning App**.



## Fine-Tune Access to Elements in Flow Builder

Use new permissions to enable users that don't have the Manage Flows permission to access the Assignment, Collection Filter, Collection Sort, Delete Records, Get Records, Loop, and Subflow elements in segment-triggered and form-triggered flows.

**Where:** This feature is available in Lightning Experience for Salesforce Enterprise and Unlimited editions with Marketing Cloud Growth edition.

**How:** In Setup, on the Permission Sets page, select a permission set such as Marketing Cloud Admin. Go to App Permissions and select one or more of these permissions:

| Permission Name                 | Description                                                                                                                                                          |
|---------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Add Assignment Element to Flows | Allow users without the Manage Flow user permission to add the Assignment element to segment-triggered and form-triggered flows in the Automation or Marketing apps. |

| Permission Name                        | Description                                                                                                                                                                 |
|----------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Add Collection Filter Element to Flows | Allow users without the Manage Flow user permission to add the Collection Filter element to segment-triggered and form-triggered flows in the Automation or Marketing apps. |
| Add Collection Sort Element to Flows   | Allow users without the Manage Flow user permission to add the Collection Sort element to segment-triggered and form-triggered flows in the Automation or Marketing apps.   |
| Add Delete Records Element to Flows    | Allow users without the Manage Flow user permission to add the Delete Records element to segment-triggered and form-triggered flows in the Automation or Marketing apps.    |
| Add Get Records Element to Flows       | Allow users without the Manage Flow user permission to add the Get Records element to segment-triggered and form-triggered flows in the Automation or Marketing apps.       |
| Add Loop Element to Flows              | Allow users without the Manage Flow user permission to add the Loop element to segment-triggered and form-triggered flows in the Automation or Marketing apps.              |
| Add Subflow Element to Flows           | Allow users without the Manage Flow user permission to add the Subflow element to segment-triggered and form-triggered flows in the Automation or Marketing apps.           |

## Have Unlimited Paused and Waiting Flows

We've removed the per-org usage-based limit for paused and waiting flow interviews. While there's no limit now for paused and waiting flow interviews, the number of paused and waiting flows can still be limited by the amount of storage available to your org. If you need more storage, call your Salesforce account rep.

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

## Organize Your Flows Based on Categories and Subcategories That You Define

Group your flows into categories and subcategories with two new fields on the flow record Details page. Use these fields to create custom list views of your flows in the Automation Lightning app.

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

**How:** In the Automation Lightning app, click a Flow Label to open the Details page for a flow. Edit the Category or Subcategory field. For example, set the Category field to Service. Because Category and Subcategory are text fields, we recommend maintaining a list of any values that you create.

In the Flows tab of the Automation Lightning app, create a new list view using the Category or Subcategory field as a filter.

## Flow Actions

Lock and unlock records with an action. Set actions using visible default values and custom placeholder text. Configure a secure MuleSoft connection with all org types and customers. Use threading tokens in emails to link email replies to the right records.

### IN THIS SECTION:

#### [Lock and Unlock Records with an Action](#)

Worried about someone updating a record when you're updating it in a flow? Use the Lock Record action in a flow's Action element to lock or unlock a record and specify who can edit the record while it's locked.

#### [Use the New Toggle for Flow Action Inputs with Explicit Default Values](#)

You can now see explicitly defined default values for flow action inputs. Use the Included with Default Value toggle value to see the explicitly defined default value that's sent to the action at run time. Or use the Included with Specified Value toggle value to instead specify a value for the input. You can also see custom guidance in inputs with defined placeholder text. This update doesn't impact actions that were created or updated before Summer '24.

#### [Configure a Secure Connection with MuleSoft in Setup \(Generally Available\)](#)

Now generally available, customers can configure a secure connection with MuleSoft directly from the MuleSoft Services Setup page. Manually add a connection through the simplified process of exchanging your provided MuleSoft and Salesforce org codes. Establishing this connection enables MuleSoft to publish MuleSoft assets to Salesforce, creating the entities necessary to invoke those assets.

### [Use Threading Tokens in Emails](#)

Now even automated emails support the new token-based threading. To securely link email replies to the correct record, place a threading token in the email's subject or body.

## Lock and Unlock Records with an Action

Worried about someone updating a record when you're updating it in a flow? Use the Lock Record action in a flow's Action element to lock or unlock a record and specify who can edit the record while it's locked.

**Where:** This change applies to Lightning Experience, Salesforce Classic (not available in all orgs), and all versions of the mobile app in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

SEE ALSO:

[Salesforce Help: Flow Core Action: Lock Record \(can be outdated or unavailable during release preview\)](#)

## Use the New Toggle for Flow Action Inputs with Explicit Default Values

You can now see explicitly defined default values for flow action inputs. Use the Included with Default Value toggle value to see the explicitly defined default value that's sent to the action at run time. Or use the Included with Specified Value toggle value to instead specify a value for the input. You can also see custom guidance in inputs with defined placeholder text. This update doesn't impact actions that were created or updated before Summer '24.

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

**How:** Add an Action element to your flow. Select an action with an explicitly defined default value or custom placeholder text. See the explicitly defined default value (1). To specify a different value, toggle **Included with Default Value** (2) to **Included with Specified Value**. If the input has custom placeholder text, you can see it in the text box (3).

**Create New Account Tasks**

\* Label  
Create New Account Tasks Action 1

\* API Name ⓘ  
Create\_New\_Account\_Tasks\_Action\_1

Description

**Create New Account Tasks**  
apex-CreateNewAccountTasks

Use values from earlier in the flow to set the inputs for the "Create New Account Tasks" Apex action. To use its outputs later in the flow, store them in variables.

Set Input Values for the Selected Action

Account ID ⓘ  
Specify the account ID to create tasks for... Q  Included

Recurring  
True  Included with Default Value

**SEE ALSO:**

[Make Invocable Actions Easier to Configure with New InvocableVariable Modifiers](#)

[Developer Documentation: InvocableVariable Annotation \(can be outdated or unavailable during release preview\)](#)

## Configure a Secure Connection with MuleSoft in Setup (Generally Available)

Now generally available, customers can configure a secure connection with MuleSoft directly from the MuleSoft Services Setup page. Manually add a connection through the simplified process of exchanging your provided MuleSoft and Salesforce org codes. Establishing this connection enables MuleSoft to publish MuleSoft assets to Salesforce, creating the entities necessary to invoke those assets.

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

**How:** From Setup, in the Quick Find box, enter *MuleSoft*, and then select **MuleSoft > Services**. Click **Manage** to open a new dialog. Click **Connect** in the dialog to start establishing the connection.

## Use Threading Tokens in Emails

Now even automated emails support the new token-based threading. To securely link email replies to the correct record, place a threading token in the email's subject or body.

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

**How:** Go to the Send Email core action in Flow Builder. When you're setting input values, choose to add a threading token to the email subject or body. Be sure to include a Related Record ID.

If the related record is a case, Email-to-Case processes email replies automatically. Salesforce now also supports threading for other types of objects. To process incoming emails containing tokens that aren't cases, create an Apex Email Service and use the `EmailMessages.getRecordIdFromEmail` function to find the record that matches the token. For example, if you're implementing approval



processing and you've provided a Related Record ID of a PurchaseRequest custom object record, use the Apex Email Service to retrieve the recordId and pass it to an autolaunched flow.

SEE ALSO:

[Salesforce Help: Flow Core Action: Send Email \(can be outdated or unavailable during release preview\)](#)

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

[Apex Reference Guide: getRecordIdFromEmail \(can be outdated or unavailable during release preview\)](#)

## Flow and Process Release Updates

Salesforce Flow has several release updates that are scheduled to be enforced in future releases.

IN THIS SECTION:

[Enable EmailSimple Invocable Action to Respect Organization-Wide Profile Settings \(Release Update\)](#)

With this update enabled, the Send Email 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. This update is available starting in Spring '24.

[Prevent Guest User from Editing or Deleting Approval Requests \(Release Update\)](#)

After Prevent Guest User from Editing or Deleting Approval Requests is enabled, guest users can approve or reject an approval request. Guest users are no longer able to edit, reassign, or delete approval requests. This update was first 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. This update is available starting in Winter '24.

[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.

#### [Improve Scheduled Flow Performance with Updated Limits](#)

Update your scheduled flow API to API version 61.0 to take advantage of the changed asynchronous limits. This change provides a better automation experience for complex flows.

#### [Sort Apex Batch Action Results by Request Order \(Release Update\)](#)

This update enables Apex batch action results to be returned in the order the requests are received. Currently, error-prone requests are prioritized at the top of the result list, while successful ones are positioned at the bottom.

#### [Enforce Permission Requirements Defined on Built-In Apex Classes Used as Inputs \(Release Update\)](#)

This update enables permission requirements to be enforced for built-in Apex classes that are used as inputs for Apex actions. It also guarantees that the affected Apex action operates within the current component context. Currently, Apex actions rely on the previous component context. This behavior leads to failed flow interviews when the flow includes an Apex action that contains a built-in Apex class with permission requirements as input.

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

With this update enabled, the Send Email 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 Send Email 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. This update is available starting in Spring '24.

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

**When:** Salesforce enforces this update in 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 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. This update is available starting in Winter '24.

**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 \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Limit User Access to Execute Flows \(can be outdated or unavailable during release preview\)](#)

## 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:

[Release Updates](#)

[Salesforce Help: Customize a Flow URL to Control Finish Behavior \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Manage Redirections to External URLs \(can be outdated or unavailable during release preview\)](#)

## 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.

SEE ALSO:

[Release Updates](#)

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

This update fixes a bug with the evaluation criteria in processes that have multiple criteria and a record update. This release update ensures that a process with multiple criteria and a record update evaluates the original value of the field that began the process with a value of null. This update was first made available in Summer '19.

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

**When:** Salesforce enforces this update in Summer '25. To get the major release upgrade date for your instance, go to [Trust Status](#), search for your instance, and click the maintenance tab.

**How:** To apply this update, from Setup, in the Quick Find box, enter *Release Updates*, and then select **Release Updates**. For Evaluate Criteria Based on Original Record Values in Process Builder, follow the testing and activation steps.

If you have a process with the *Do you want to execute the actions only when specified changes are made to the record?* option selected, or it uses the `ISCHANGED()` function in your criteria, this update can cause the process to behave differently.

SEE ALSO:

[Release Updates](#)

## Make 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 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.

SEE ALSO:

[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.

**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.

SEE ALSO:

[Release Updates](#)

## 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:**

Review any API integrations that use invocable actions to ensure they properly accommodate partial-save behavior. Then, from Setup, in the Quick Find box, enter *Release Updates*, and then select **Release Updates**. To get the Enable Partial Save for Invocable Actions release update, follow the testing and activation steps

SEE ALSO:

[Release Updates](#)

## Improve Scheduled Flow Performance with Updated Limits

Update your scheduled flow API to API version 61.0 to take advantage of the changed asynchronous limits. This change provides a better automation experience for complex flows.

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

SEE ALSO:

[Developer Documentation: Apex Governor Limits](#)



## Sort Apex Batch Action Results by Request Order (Release Update)

This update enables Apex batch action results to be returned in the order the requests are received. Currently, error-prone requests are prioritized at the top of the result list, while successful ones are positioned at the bottom.

**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.

**Why:** Currently, results with errors are prioritized at the top of the result list, and successful ones are positioned at the bottom. With this change, all results are sorted by when the associated requests were received.

**How:** After this update is applied, Apex batch action results are ordered according to when the incoming requests were received. Then, from Setup, in the Quick Find box, enter *Release Updates*, and then select **Release Updates**. To get the Enforce Permission Requirements Defined on File-Based Apex Classes Used as Inputs release update, follow the testing and activation steps.

## Enforce Permission Requirements Defined on Built-In Apex Classes Used as Inputs (Release Update)

This update enables permission requirements to be enforced for built-in Apex classes that are used as inputs for Apex actions. It also guarantees that the affected Apex action operates within the current component context. Currently, Apex actions rely on the previous component context. This behavior leads to failed flow interviews when the flow includes an Apex action that contains a built-in Apex class with permission requirements as input.

**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.

**Why:** Currently, Apex actions rely on the previous component context. With this update enabled, permission requirements are enforced for built-in Apex classes that are used as inputs for Apex actions. It also guarantees that the affected Apex action operates within the current component context.

**How:** When this update is enabled, permission requirements for Apex inputs that use built-in Apex classes are enforced, and the affected Apex action operates within the current component context. Then, from Setup, in the Quick Find box, enter *Release Updates*, and then select **Release Updates**. To get the Enforce Permission Requirements Defined on Built-In Apex Classes Used as Inputs release update, follow the testing and activation steps.

## Flow Orchestration

Manually suspend a running orchestration. Fix the errors in an orchestration run that failed within the previous 14 days because of a recoverable error, and then resume the orchestration run. See all of your assigned orchestration work items for a record and select the one to complete first.

### IN THIS SECTION:

#### [Suspend and Resume an Orchestration](#)

You started your loan processing orchestration, but your customer wants to pause the process so they can add more documentation. What can you do? Now you can suspend a running orchestration, and when the customer has updated their documentation, you can resume the orchestration.

#### [Resume a Failed Orchestration](#)

Your orchestration ran for 3 weeks and then failed. Did it fail because a flow or action called by a step failed? If it did and the orchestration run failed within the last 14 days, you can now fix the error and resume the orchestration run.

### [Select the Orchestration Work Item to Complete](#)

You've been assigned 3 work items for an opportunity record. You can now see all items assigned to you in the Orchestration Work Guide component on the associated record page, so you select the one that you want to complete first. When you've completed a work item, the work item list refreshes automatically.

### [Use Omni-Channel Routing with Work Items](#)

When an interactive step is assigned to a group or queue, the orchestration run emails all assigned users a notification that they have an assigned work item. Now use Omni-Channel to route work items based on routing logic that you define. To use Omni-Channel routing, assign an interactive step to a queue that's associated with the Orchestration Work Item object. With Omni-Channel routing, queue members still receive notification emails, but they're also notified via the Omni-Channel widget based on your routing logic.

### [Configure Conditions More Easily with the Is Blank Operator in Orchestration](#)

You can now use the Is Blank operator in a condition to check whether a text value contains no characters or only white space. For values of data types other than text, the Is Blank operator checks whether the values are null. Previously, you used the Equals operator and the Blank Value (Empty String) global constant.

### [Other Changes to Flow Orchestration](#)

We made several improvements to Flow Orchestration.

## Suspend and Resume an Orchestration

You started your loan processing orchestration, but your customer wants to pause the process so they can add more documentation. What can you do? Now you can suspend a running orchestration, and when the customer has updated their documentation, you can resume the orchestration.

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

**Who:** Users with the Manage Orchestration Runs user permission or the Manage Orchestration Runs and Work Items user permission.

**How:** To suspend an orchestration run, from the Orchestration Runs list view, locate the orchestration run you want to suspend, and, from its Quick Action menu, select **Suspend Run**. To resume a suspended orchestration run, from the Orchestration Runs list view, locate the suspended orchestration run you want to resume, and, from its Quick Action menu, select **Resume Run**.

SEE ALSO:

[Salesforce Help: Suspend a Running Orchestration \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Resume a Suspended Orchestration \(can be outdated or unavailable during release preview\)](#)

## Resume a Failed Orchestration

Your orchestration ran for 3 weeks and then failed. Did it fail because a flow or action called by a step failed? If it did and the orchestration run failed within the last 14 days, you can now fix the error and resume the orchestration run.

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

**Who:** Users with the Manage Orchestration Runs user permission or the Manage Orchestration Runs and Work Items user permission.

**How:** To resume a failed orchestration run, from the Orchestration Runs list view, locate the orchestration run you want to resume, and, from its Quick Action menu, select **Resume Run**. Resume Run isn't available for an orchestration run when its failure wasn't due to a called flow or when action or the failure occurred more than 14 days in the past.

SEE ALSO:

[Salesforce Help: Resume a Failed Orchestration \(can be outdated or unavailable during release preview\)](#)

## Select the Orchestration Work Item to Complete

You've been assigned 3 work items for an opportunity record. You can now see all items assigned to you in the Orchestration Work Guide component on the associated record page, so you select the one that you want to complete first. When you've completed a work item, the work item list refreshes automatically.

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

SEE ALSO:

[Salesforce Help: View Orchestration Work Items on a Record \(can be outdated or unavailable during release preview\)](#)

## Use Omni-Channel Routing with Work Items

When an interactive step is assigned to a group or queue, the orchestration run emails all assigned users a notification that they have an assigned work item. Now use Omni-Channel to route work items based on routing logic that you define. To use Omni-Channel routing, assign an interactive step to a queue that's associated with the Orchestration Work Item object. With Omni-Channel routing, queue members still receive notification emails, but they're also notified via the Omni-Channel widget based on your routing logic.

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

SEE ALSO:

[Salesforce Help: Route Work with Omni-Channel \(can be outdated or unavailable during release preview\)](#)

## Configure Conditions More Easily with the Is Blank Operator in Orchestration

You can now use the Is Blank operator in a condition to check whether a text value contains no characters or only white space. For values of data types other than text, the Is Blank operator checks whether the values are null. Previously, you used the Equals operator and the Blank Value (Empty String) global constant.

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

**How:** Add a Stage element, a Decision element, or Step resource to your orchestration. To determine whether a text resource references an empty string, configure a condition with a resource that can contain a string. Then select the **Is Blank** operator.

| Resource    | Operator | Value |
|-------------|----------|-------|
| my_resource | Is Blank | True  |

SEE ALSO:

[Salesforce Help: Flow Orchestration Operators in Decision Elements \(can be outdated or unavailable during release preview\)](#)

## Other Changes to Flow Orchestration

We made several improvements to Flow Orchestration.

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

### Enhanced Flow Orchestration Object Relationships

We've enhanced the relationships between Flow Orchestration objects. This change means that you can add relationships to custom reports and use those reports in more robust dashboards.

## Searchable Work Items in the To-Do List

You can now search orchestration work items that appear in the To-Do List.

## Ownership of Work Items Assigned to Queues

When you assign an interactive step to a queue, ownership of the work item depends on whether the queue supports the Orchestration Work Item object. If the queue doesn't support the Orchestration Work Item object, then the work item owner is still the automated process user. If the queue supports the Orchestration Work Item object, then the work item owner is now the queue.

## Updated Resource Picker for Orchestrations

When you set up conditions or pass values to called actions, access resources associated with steps through the step's parent stage in the Resource picker.

## Updated Orchestration Run Quick Menu Labels

We've updated the labels on the orchestration run Quick Menu. Cancel Orchestration and Debug Orchestration are now Cancel and Debug respectively.

SEE ALSO:

[Salesforce Help: Flow Orchestration Work Items \(can be outdated or unavailable during release preview\)](#)

[Use Omni-Channel Routing with Work Items](#)

# 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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External Client App Manager, OAuth 2.0 token exchange handlers, and Event Log File Browser are each now available in Setup. Also, external client apps now support a bunch of new OAuth flows. Give users access to manage custom domains with a new, more targeted user permission. Create uninterrupted user experiences across Salesforce and custom interfaces with the new Single-Access UI Bridge API. Access your Data Cloud encryption policy status from the Security Center Encryption Policy metric. Scratch orgs on Salesforce Edge Network use partitioned domains. And Android mobile connected apps now require the Admin SDK private key and project ID from a Google Firebase project.

IN THIS SECTION:

[Salesforce Backup](#)

Salesforce Backup managed package expands the list of supported objects to cover read-only objects. Choose when your backups run with new customizable backup scheduling.

[Domains](#)

Update references to legacy Salesforce URLs before redirections stop in Winter '25. Give users access to manage custom domains with a new, more targeted user permission. And scratch orgs on Salesforce Edge Network use partitioned domains.

### [Identity and Access Management](#)

Use the External Client App Manager in Setup to create and manage external client apps, and check out the new flows for external client apps. Also in Setup, define and enable OAuth 2.0 token exchange handlers for the OAuth 2.0 token exchange flow. Create uninterrupted user experiences across Salesforce and custom interfaces with the new Single-Access UI Bridge API.

### [Privacy Center](#)

Review recent changes to Privacy Center's user interface and functionality.

### [Salesforce Shield](#)

Encrypt more Nonprofit Cloud data. Net Zero Cloud objects are compatible with Field Audit Trail. Event Log File Browser is generally available for easy access to event log files right from Setup. And say goodbye to third-party tools for digging into event logs. Event Monitoring's new event log object framework (beta) captures event data in standard objects that support direct queries via API.

### [Security Center](#)

View pertinent data with enhanced charts. Access your Data Cloud encryption policy status from the Security Center Encryption Policy metric. Create custom metrics (beta) in Security Center.

### [Other Security Changes](#)

To prepare for two release updates, view blocked redirections and resources in an updated Setup page. Reduce emails about certificate expirations, and create certificates with a 3072-bit key length. And refresh Named Credentials access tokens based on non-standard HTTP status codes.

## Salesforce Backup

Salesforce Backup managed package expands the list of supported objects to cover read-only objects. Choose when your backups run with new customizable backup scheduling.

### IN THIS SECTION:

#### [Set a Custom Backup Schedule](#)

Every organization has their own rhythm, schedules, and work cadences. You can now customize your backup schedule to suit your needs. Configure your policy to capture backups monthly, weekly, daily, or hourly. You can also choose a start time and preferred time zone. This change is available in v2.19 of the Salesforce Backup managed package.

#### [Add Read-Only Objects to Your Backup Policy](#)

Version 2.19 of the Salesforce Backup managed package now supports some read-only objects, including History associated objects and more Activities objects. Add these objects to your policy when you want to retain records for future auditing purposes such as reviewing changes to important fields over time.

## Set a Custom Backup Schedule

Every organization has their own rhythm, schedules, and work cadences. You can now customize your backup schedule to suit your needs. Configure your policy to capture backups monthly, weekly, daily, or hourly. You can also choose a start time and preferred time zone. This change is available in v2.19 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 Salesforce Backup add-on subscription.

**How:** In the Salesforce Backup app, on the Backup tab, click **Configure Policy Defaults**. Then choose when you want the app to make backups.

**Configure Policy Details**

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**Backup Schedule**

Define when and how often your backup runs. By default, backups run daily at 5:00 PM Central Time (GMT - 5).

\* Frequency

\* Start Day and Time      \* Start Time  
     

\* Time Zone

#### IN THIS SECTION:

##### [Get More Information from Backup and Restore Logs](#)

Messages on the Logs page in the Salesforce Backup managed package are simpler, easier to scan, and more informative. The Log Name column now shows only when jobs have started and complete. New job status categories group issues based on severity: errors that require the help of Salesforce Customer Support, alerts about states—such as missing permissions—that you can fix, and informational messages that don't require action. We also improved some object status codes for clarity and accuracy.

#### SEE ALSO:

[Salesforce Help: Set a Custom Backup Schedule \(can be outdated or unavailable during release preview\)](#)

## Get More Information from Backup and Restore Logs

Messages on the Logs page in the Salesforce Backup managed package are simpler, easier to scan, and more informative. The Log Name column now shows only when jobs have started and complete. New job status categories group issues based on severity: errors that require the help of Salesforce Customer Support, alerts about states—such as missing permissions—that you can fix, and informational messages that don't require action. We also improved some object status codes for clarity and accuracy.

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

**How:** In the Salesforce Backup managed package, select the Logs tab. You can review more informative object status codes on a log's detail page. For example, objects that were previously marked as NOT\_VISIBLE are now marked as MISSING\_PERMISSIONS, helping you understand the next steps you can take to fix the issue.

## Add Read-Only Objects to Your Backup Policy

Version 2.19 of the Salesforce Backup managed package now supports some read-only objects, including History associated objects and more Activities objects. Add these objects to your policy when you want to retain records for future auditing purposes such as reviewing changes to important fields over time.

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

**Who:** This change applies to editions that have the Salesforce Backup add-on subscription.

**How:** In the Salesforce Backup app, on the Backup tab, supported read-only objects appear in the list of available objects. Select an object, and enable it in your policy.

## Domains

Update references to legacy Salesforce URLs before redirections stop in Winter '25. Give users access to manage custom domains with a new, more targeted user permission. And scratch orgs on Salesforce Edge Network use partitioned domains.

**IN THIS SECTION:**[Update References to Your Previous Salesforce Domains](#)

Prevent disruption for your customers and end users when the temporary redirection of legacy Salesforce domains ends. To help your users update outdated links and bookmarks, show 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.

[Identify Redirections for Your Instanced My Domain Hostnames](#)

Identify your hard-coded instanced My Domain URLs to update before those redirections end in Winter '25. To help you, a field on the Hostname Redirects event type now tracks redirections for these URLs.

[Grant Specific Permission to Manage Custom Domains](#)

Permit users to add, edit, and delete custom domains and custom URLs without granting them broader admin privileges. A custom domain serves your Experience Cloud sites or Salesforce Sites on a domain that you own, such as <https://www.example.com>. Previously, to manage custom domains, you assigned the Customize Application user permission.

[Maximize Availability with 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 so that Salesforce can gradually roll out service-delivery changes. This feature is enabled by default in new qualifying orgs, and sandboxes with enhanced domains are always partitioned. 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. To help your users update outdated links and bookmarks, show 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 \(can be outdated or unavailable during release preview\)](#)

## Identify Redirections for Your Instanced My Domain Hostnames

Identify your hard-coded instanced My Domain URLs to update before those redirections end in Winter '25. To help you, a field on the Hostname Redirects event type now tracks redirections for these URLs.

**Where:** This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions. The Hostname Redirects event is available in the API but not in the Event Monitoring Analytics app. This event is free for all customers with a 24-hour data retention period.

**SEE ALSO:**

[Identify Instanced Hostname Redirections](#)

## Grant Specific Permission to Manage Custom Domains

Permit users to add, edit, and delete custom domains and custom URLs without granting them broader admin privileges. A custom domain serves your Experience Cloud sites or Salesforce Sites on a domain that you own, such as <https://www.example.com>. Previously, to manage custom domains, you assigned the Customize Application user permission.

**Where:** This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, and Unlimited editions. Custom domains are also available in Professional Edition with Marketing Cloud Account Engagement (Pardot).

**How:** Add the new Custom Domain Management user permission to a new or existing permission set. Then assign the permission set to the users who require this permission.

SEE ALSO:

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

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

## Maximize Availability with 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 so that Salesforce can gradually roll out service-delivery changes. This feature is enabled by default in new qualifying orgs, and sandboxes with enhanced domains are always partitioned. 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 scratch partition is newly available if you use Salesforce Edge Network. Only the sandbox partition is available in Government Cloud—Defense orgs. Partitioned domains aren't available in Trailhead Playgrounds on Salesforce Edge Network.

**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: **mycompany-dev-ed.my.salesforce.com with enhanced domains**

Before changing your My Domain details, review My Domain Considerations in Salesforce Help.

If you change your My Domain name or suffix, you must deploy your new My Domain.

My Domain Name  Check Availability Available

Domain Suffix  ▼

Domain Partitioning  Use partitioned domains

Your chosen new My Domain URL **mycompany-dev-ed.develop.my.salesforce.com with partitioned enhanced domains**

Save Cancel

SEE ALSO:

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



# Identity and Access Management

Use the External Client App Manager in Setup to create and manage external client apps, and check out the new flows for external client apps. Also in Setup, define and enable OAuth 2.0 token exchange handlers for the OAuth 2.0 token exchange flow. Create uninterrupted user experiences across Salesforce and custom interfaces with the new Single-Access UI Bridge API.

## IN THIS SECTION:

### [Customize SMS One-Time Password Delivery for Experience Cloud Sites \(Beta\)](#)

To provide branded, personalized identity verification experiences for external users, create an Apex handler to send one-time passwords (OTPs) via an SMS messaging provider of your choice. Customize the content of the message and the short code that tells users who sent it. Use the handler to send OTPs for any Experience Cloud identity verification use case, such as multi-factor authentication (MFA) and passwordless login.

### [Brand the Welcome Email for Passwordless Registration](#)

Take control of identity experiences for customers and partners. Use the new Welcome New Member for Passwordless Registration email template to customize the one-time password (OTP) email that users receive when they sign up for your Experience Cloud site using passwordless registration.

### [Create External Client Apps While Maintaining Security and Defined User Roles](#)

Try the new External Client App Manager to create, manage, and update your external client apps. You can still do all these things with Metadata API, but this new user interface means that now you don't have to. With External Client App Manager, you can create a local app just for your org or design one to package and distribute.

### [Use More OAuth Features with External Client Apps](#)

The external client apps framework, a new and improved generation of connected apps, is catching up to connected apps fast. The new framework now supports headless login, passwordless login, and guest user flows using the Authorization Code and Credentials Flow. You can also configure an external client app to issue JSON Web Token (JWT)-based access tokens.

### [Integrate Custom App Experiences with the Salesforce UI](#)

Give users uninterrupted access across custom apps and Salesforce. With the new Single-Access UI Bridge API, use an existing Salesforce access token to load a new session in a Salesforce UI, such as a Visualforce site or mobile app. For example, when users are logged in to a headless app, redirect them to your Experience Cloud site to view Support cases without making them log in again.

### [Create Token Exchange Handlers More Easily](#)

For better usability when configuring the OAuth 2.0 token exchange flow, define and enable OAuth 2.0 token exchange handlers in Setup instead of using Metadata API. Create a handler definition, link it to an Apex class, and set some of its properties, such as what types of tokens it supports and whether it can create users.

### [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 was first made available in Spring '24. It was scheduled to be enforced for all instances in Summer '24, but we postponed the enforcement date for production instances to Spring '25. This update is still enforced for sandboxes in Summer '24.

### [Enter New Firebase Information Required for Android Push Notifications](#)

The legacy Firebase Cloud Messaging API server key is no longer accepted for configuring Android push notifications on mobile connected apps. Because of a change in how Google handles push notifications, Android mobile connected apps now require the Admin SDK private key and project ID from a Google Firebase project.

### [Use REST API for Access to External Client App OAuth Consumer Credentials \(Release Update\)](#)

To follow recommended security standards, use the new `credentials` Connect REST API resource instead of Metadata API to access External Client App OAuth consumer credentials.

### [Verify Email Addresses to Meet the Email Verification Requirement](#)

To complete enforcement of the email verification requirement introduced in the Spring '22 major release, Salesforce now requires all users in all orgs and Experience Cloud sites to verify their email address. If a user sends an email from an unverified email address, Salesforce rejects this email message and doesn't complete the send. Unverified email addresses can't be used for sends until the user verifies their email address or resets their password. To avoid disruptions, ensure that all user email addresses are verified.

### [Stay on Top of MFA Compliance](#)

Multi-factor authentication (MFA) is turned on by default for direct logins to production orgs as of April 8, 2024. Starting in Summer '24, admins get in-app reminders if they don't comply with the MFA requirement.

### [Forced Login is Permanently Disabled in Winter '25](#)

To improve security, in Winter '25, users can no longer log in to Salesforce by passing a username and password as URL query string parameters in the login URL, also known as forced login. This change will break implementations and third-party integrations that use a forced login via a URL, as well as direct login (autologin) links. To avoid service disruptions, update integrations that use forced login.

### [Identify the Origin IP Address for Logins with One or More Proxies](#)

To monitor login activity more thoroughly and prevent potential threats, you can now see what value the client passed in the `X-Forwarded-For` header of their HTTP request to Salesforce. For logins that redirect users to one or more proxies, the `X-Forwarded-For` field is sometimes used to store the origin IP address of the client. Use the new Forwarded for IP column in the Login History and related fields to track the origin IP address. This change isn't available for OAuth and single sign-on (SSO) logins.

### [Password Reset Login Subtype Label Is Changed](#)

For more consistency with naming conventions, we renamed the label for the password reset login subtype in the Login History. When a user resets their password, the Login Subtype column now displays UI Password Reset instead of Change Password.

### [Enable Embedded Login](#)

Although Salesforce doesn't recommend it, if you must use Embedded Login with your Experience Cloud Site, you can enable it on the Login & Registration page. In Summer '24, Salesforce disabled Embedded Login by default to encourage users to move to OAuth 2.0 Web Server Flow or OAuth 2.0 User-Agent Flow.

### [Take Advantage of Apex Enhancements for Processing JSON Web Tokens \(JWTs\)](#)

With changes to how JSON Web Tokens (JWTs) are processed, it's now easier to extract data from JWTs generated by methods in the `Auth.JWTUtil` class. We also clarified what methods we support for a JWT depending on where it came from. And you can get more test coverage by mocking HTTP callouts when processing JWTs.

### [Use the Token Exchange Flow with More Identity Providers](#)

With new support for larger tokens, use the OAuth 2.0 token exchange flow with a wider range of third-party identity providers. When you send third-party tokens to Salesforce in the `subject_token` parameter, the value can be up to 10,000 characters long. Previously, the maximum length for values in this parameter was 2,000 characters.

### [Simultaneous Token Requests Are Blocked During the Refresh Token Flow](#)

To reduce performance issues, we now prevent client apps from sending simultaneous token requests with the same refresh token when using the OAuth 2.0 refresh token flow. Previously, identical token requests sent at the same time didn't fail, but they did lead to system issues across Salesforce. To avoid disruptions, update integrations that use the refresh token flow to stop sending simultaneous, identical requests to the token endpoint. Improve the efficiency of your integrations by reusing access tokens instead of continually requesting new ones.

### [Users Must Approve Access Every Time They Trigger the Device Flow](#)

To improve security for the OAuth 2.0 device flow, we now prompt users to allow access to their Salesforce data every time they complete an action that initiates the flow. Before this change, for some integrations built with this flow, users who previously allowed an app to access their data sometimes weren't prompted for approval.


### [Refresh Token Rotation Now Works As Expected for Instances on Salesforce's First-Party Infrastructure](#)

OAuth refresh token rotation now works as expected for all instances on Salesforce's first-party infrastructure. Previously, it didn't work for some instances on our first-party infrastructure. When this change takes effect, apps that are enabled for refresh token rotation work as expected, which can cause apps to break if they weren't developed properly. To avoid performance issues, update your integrations.

## Customize SMS One-Time Password Delivery for Experience Cloud Sites (Beta)

To provide branded, personalized identity verification experiences for external users, create an Apex handler to send one-time passwords (OTPs) via an SMS messaging provider of your choice. Customize the content of the message and the short code that tells users who sent it. Use the handler to send OTPs for any Experience Cloud identity verification use case, such as multi-factor authentication (MFA) and passwordless login.

**Where:** These changes apply to [LWR, Aura, and Visualforce sites](#) accessed through Lightning Experience and Salesforce Classic in Enterprise, Unlimited, and Developer editions.

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

**Why:** For Experience Cloud sites, use a custom OTP provider for any identity verification use case that uses SMS, such as MFA, passwordless login and registration, self-registration with SMS, and device activation.

For headless apps, use a custom OTP provider to send SMS messages during the headless forgot password, passwordless login, and registration flows.

**How:** Create a custom one-time password delivery handler Apex class. From your Experience Cloud Login & Registration settings, in the Customized OTP Delivery section, select your Apex handler class.

To opt in to this feature, contact your Salesforce account executive. Opting in to this feature affects all Experience Cloud sites. To avoid disruptions, enable the Apex handler for all sites.

SEE ALSO:

[Salesforce Help: Customize OTP Delivery for Experience Cloud Identity Verification \(Beta\) \(can be outdated or unavailable during release preview\)](#)

## Brand the Welcome Email for Passwordless Registration

Take control of identity experiences for customers and partners. Use the new Welcome New Member for Passwordless Registration email template to customize the one-time password (OTP) email that users receive when they sign up for your Experience Cloud site using passwordless registration.

**Where:** These changes apply to [LWR](#), [Aura](#), and [Visualforce sites](#) accessed through Lightning Experience and Salesforce Classic in Professional, Enterprise, Unlimited, and Developer editions.

SEE ALSO:

[New and Changed Objects](#)

[Salesforce Help: Customize the Passwordless Registration Welcome Email Template \(can be outdated or unavailable during release preview\)](#)

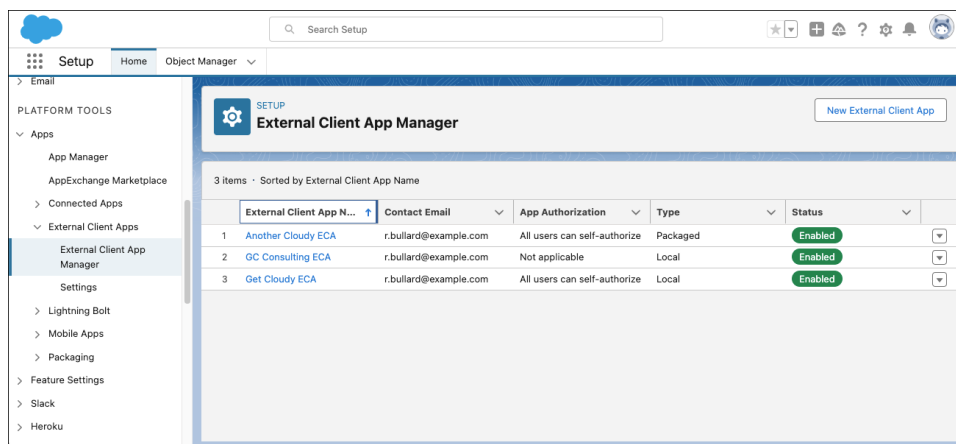
## Create External Client Apps While Maintaining Security and Defined User Roles

Try the new External Client App Manager to create, manage, and update your external client apps. You can still do all these things with Metadata API, but this new user interface means that now you don't have to. With External Client App Manager, you can create a local app just for your org or design one to package and distribute.

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

**Who:** The External Client App Manager is shown only to Lightning Experience-enabled users on orgs that have opted in to External Client Apps.

**Why:** As part of the new generation of Connected Apps, External Client Apps offers the ability to connect external applications with Salesforce data while maintaining security and clearly defining user roles. External client apps are designed with the security of second-generation managed packaging in mind.



**How:** In Setup, in the Quick Find box, enter *External Client App*, and then select **Settings**. Select **Opt in to External Client Apps**.

SEE ALSO:

[Salesforce Help: Comparison of Connected Apps and External Client Apps Features \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: External Client Apps \(can be outdated or unavailable during release preview\)](#)

## Use More OAuth Features with External Client Apps

The external client apps framework, a new and improved generation of connected apps, is catching up to connected apps fast. The new framework now supports headless login, passwordless login, and guest user flows using the Authorization Code and Credentials Flow. You can also configure an external client app to issue JSON Web Token (JWT)-based access tokens.

**Where:** The changes to support the Authorization Code and Credentials Flow apply to [LWR, Aura, and Visualforce sites](#) accessed through Lightning Experience and Salesforce Classic in Enterprise, Unlimited, and Developer editions. The changes to support JWT-based access tokens apply to Lightning Experience and Salesforce Classic in Group, Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

**Why:** Unlike the connected apps framework, the external client apps framework is compatible with second-generation packaging (2GP), making apps easier to package and distribute. It's also more secure and fully metadata-exposed. And its design makes it easy to define clear roles for developers and admins.

**How:** Create and edit external client apps via the External Client App Manager in Setup, or use Metadata API. External client apps currently support all variations of the Authorization Code and Credentials Flow except headless registration.

SEE ALSO:

[Metadata API](#)

[Salesforce Help: Headless Identity APIs for Customers and Partners \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: External Client Apps \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: JWT-Based Access Tokens \(can be outdated or unavailable during release preview\)](#)

## Integrate Custom App Experiences with the Salesforce UI

Give users uninterrupted access across custom apps and Salesforce. With the new Single-Access UI Bridge API, use an existing Salesforce access token to load a new session in a Salesforce UI, such as a Visualforce site or mobile app. For example, when users are logged in to a headless app, redirect them to your Experience Cloud site to view Support cases without making them log in again.

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

**How:** Using a POST request, send an access token to the new `/services/oauth2/singleaccess` endpoint on your My Domain or Experience Cloud site. Salesforce returns a JSON response with a `frontdoor.jsp` URL. Use the URL to redirect the user and load a new, authenticated session in a custom interface.

SEE ALSO:

[Salesforce Help: Generate a Frontdoor URL to Bridge into UI Sessions \(can be outdated or unavailable during release preview\)](#)

## Create Token Exchange Handlers More Easily

For better usability when configuring the OAuth 2.0 token exchange flow, define and enable OAuth 2.0 token exchange handlers in Setup instead of using Metadata API. Create a handler definition, link it to an Apex class, and set some of its properties, such as what types of tokens it supports and whether it can create users.

**Where:** This change applies to Lightning Experience (not available in all orgs) in Enterprise, Performance, Unlimited, and Developer editions.

**Why:** The token exchange flow simplifies your integration patterns for use cases that include a central identity provider, such as Okta, along with multiple service providers and microservices.

**How:** From the Token Exchange Handlers page in Setup, define and enable the handler. The ability to edit the handler in Setup isn't currently supported. To edit its definition, use Metadata API.

SEE ALSO:

[Salesforce Help: OAuth 2.0 Token Exchange Flow \(can be outdated or unavailable during release preview\)](#)

## 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 was first made available in Spring '24. It was scheduled to be enforced for all instances in Summer '24, but we postponed the enforcement date for production instances to Spring '25. This update is still enforced for sandboxes in Summer '24.

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

 **Note:** This release update is available only if you're using a single-configuration SAML framework. If you don't see this release update, you're already using the multiple-configuration framework, and this release update doesn't apply to your instance.

**When:** This update is enforced for production instances in Spring '25 and is enforced for sandboxes in Summer '24. This update was scheduled to be enforced for all instances in Summer '24 but was postponed to Spring '25 for production instances only. 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.

**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.

## Enter New Firebase Information Required for Android Push Notifications

The legacy Firebase Cloud Messaging API server key is no longer accepted for configuring Android push notifications on mobile connected apps. Because of a change in how Google handles push notifications, Android mobile connected apps now require 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 with Firebase Information Required 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](#)

## Use REST API for Access to External Client App OAuth Consumer Credentials (Release Update)

To follow recommended security standards, use the new `credentials` Connect REST API resource instead of Metadata API to access External Client App OAuth consumer credentials.

**Where:** This change applies Group, 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.

**Who:** This change applies to existing External Client App users who use Metadata API to access consumer credentials.

**Why:** Accessing consumer secrets through the credentials endpoint of the Connect REST API removes the possibility of accidentally committing consumer secrets to source control.

**How:** Access consumer secrets through the credentials endpoint of the Connect REST API. Unless you contact Salesforce Customer Support to continue using Metadata API, your external client apps can't access consumer secrets via Metadata API after Winter '25.

## Verify Email Addresses to Meet the Email Verification Requirement

To complete enforcement of the email verification requirement introduced in the Spring '22 major release, Salesforce now requires all users in all orgs and Experience Cloud sites to verify their email address. If a user sends an email from an unverified email address, Salesforce rejects this email message and doesn't complete the send. Unverified email addresses can't be used for sends until the user verifies their email address or resets their password. To avoid disruptions, ensure that all user email addresses are verified.

**Where:** This change is available in Lightning Experience and Salesforce Classic (not available in all orgs) in all editions.

**Who:** This requirement applies to all users in all orgs and Experience Cloud sites, including employee, customer, and partner users across sandbox and production instances. Most users affected by this change are SSO users because non-SSO users verify their email address when they sign up. However, some non-SSO users can be affected if they use email addresses that were added to Salesforce before the current verification process existed.

Email verification for [org-wide email addresses](#) was already and continues to be required. Any features that use org-wide email address functionality, such as Service Email, already meet email verification requirements.

**Why:** In past releases, Salesforce enforced this requirement for all orgs and Experience Cloud sites except for paid production instances with single sign-on (SSO) users. In Spring '24, Salesforce started enforcing the requirement for paid production instances with SSO users, but only for instances created after Spring '24. With the Summer '24 release, Salesforce now enforces the requirement for all orgs and Experience Cloud sites, including all paid production instances with SSO users, regardless of when they were created.

**How:** As a Salesforce admin, check a user's email verification status by viewing the user's details. From the Users page in Setup, select a user and check the Email field. When the user completes verification, the Verify link changes to Verified. Users can also see their own email verification status from the Advanced User Details page.

For unverified users, you have several options for verifying their email address. The best method for your use case depends on how many users you're verifying and what kind of experience you want to provide.

For an individual user, you can initiate verification or the user can do it themselves. With either of these methods, the user receives a Salesforce-branded verification email that can't be customized.

For a large number of users or to have more control over branding and the user experience, use these options.

- To verify multiple users at once, use the [async email method](#). You can customize the verification email template to suit your brand.
- To automatically verify all email addresses that belong to a specific domain, verify the domain using [DomainKeys Identified Mail \(DKIM\)](#). Use this method when you don't want users to receive a verification email at all.

Salesforce also verifies a user's email address during some processes, such as password reset and device activation.

For a full overview of the different ways to verify email addresses, see [User Email Verification](#) in *Salesforce Help*.

## Stay on Top of MFA Compliance

Multi-factor authentication (MFA) is turned on by default for direct logins to production orgs as of April 8, 2024. Starting in Summer '24, admins get in-app reminders if they don't comply with the MFA requirement.

**Where:** The change to turn on MFA by default applies to Lightning Experience, Salesforce Classic, and all versions of the mobile app in all editions. The change to add in-app reminders applies to Lightning Experience and all versions of the mobile app in all editions.

**How:** For more information on these changes, see [MFA Is On by Default for Direct Logins to Production Orgs](#) and [Salesforce Admins Get In-App Reminders If MFA Is Turned Off](#).

## Forced Login is Permanently Disabled in Winter '25


To improve security, in Winter '25, users can no longer log in to Salesforce by passing a username and password as URL query string parameters in the login URL, also known as forced login. This change will break implementations and third-party integrations that use a forced login via a URL, as well as direct login (autologin) links. To avoid service disruptions, update integrations that use forced login.

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

**When:** This change takes effect in Winter '25.

**Why:** In the Spring '22 release, Salesforce enforced a [release update](#) that disabled the ability for users to log in using their credentials, but some orgs are still using this feature. With this change, forced login is permanently disabled in all orgs.

**How:** To prepare for the change, first review org usage of forced login. From Setup, in the Quick Find box, enter *Login History*, and then select **Login History**. View and download your org's login history for the past 6 months. Review the HTTP method column. If the HTTP method is GET, and there's no entry for Login Subtype, it indicates that users are using forced login.

 **Note:** The HTTP method also displays GET for password resets, so make sure you check the Login Subtype to confirm that the entry doesn't reflect a password reset.

If you find users who are logging in with forced login, notify them of the upcoming change and encourage them to update their configuration before Winter '25. Migrate any integrations that use forced login to external client apps or connected apps.

## Identify the Origin IP Address for Logins with One or More Proxies

To monitor login activity more thoroughly and prevent potential threats, you can now see what value the client passed in the `X-Forwarded-For` header of their HTTP request to Salesforce. For logins that redirect users to one or more proxies, the `X-Forwarded-For` field is sometimes used to store the origin IP address of the client. Use the new Forwarded for IP column in the Login History and related fields to track the origin IP address. This change isn't available for OAuth and single sign-on (SSO) logins.

**Where:** This change is available in Lightning Experience (not available in all orgs) and Salesforce Classic in all editions.

**Why:** Salesforce tracks the Source IP of login requests, but for logins that redirect through multiple proxies, the origin IP address isn't always reflected in the source IP. In this case, the Forwarded for IP value is a better way to tell where the original request came from.

**How:** From Setup, in the Quick Find box, enter *Login History*, and then select Login History. Add the Forwarded for IP column to your Login History list view.

SEE ALSO:

[New and Changed Objects](#)

[New and Changed Standard Platform Events](#)

[Salesforce Help: Monitor Login History \(can be outdated or unavailable during release preview\)](#)



## Password Reset Login Subtype Label Is Changed

For more consistency with naming conventions, we renamed the label for the password reset login subtype in the Login History. When a user resets their password, the Login Subtype column now displays UI Password Reset instead of Change Password.

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

SEE ALSO:

[Salesforce Help: Monitor Login History \(can be outdated or unavailable during release preview\)](#)

## Enable Embedded Login

Although Salesforce doesn't recommend it, if you must use Embedded Login with your Experience Cloud Site, you can enable it on the Login & Registration page. In Summer '24, Salesforce disabled Embedded Login by default to encourage users to move to OAuth 2.0 Web Server Flow or OAuth 2.0 User-Agent Flow.

**Where:** This change applies to Lightning communities accessed through Lightning Experience and Salesforce Classic (not available in all orgs) in Professional, Enterprise, Performance, Unlimited, and Developer editions.

**Why:** We recommend that you use the [web server flow](#), the [user-agent flow](#), or another redirect-based OAuth 2.0 flow instead of Embedded Login. Embedded Login relies on third-party cookies, which are blocked or restricted in most browsers. And Embedded Login works only on Google Chrome and only as long as third-party cookies are allowed there by default.

**How:** To use Embedded Login on your Experience Cloud Site, enable the feature on the Login & Registration page. From Setup in the Quick Find Box, enter *Digital Experiences*, and then select **All Sites**. In the Digital Experiences picklist, select **Workspaces** and then click **Administration**. On the Login & Registration tab select **Allow embedded login on your Experience Cloud site**.

## Take Advantage of Apex Enhancements for Processing JSON Web Tokens (JWTs)

With changes to how JSON Web Tokens (JWTs) are processed, it's now easier to extract data from JWTs generated by methods in the `Auth.JWTUtil` class. We also clarified what methods we support for a JWT depending on where it came from. And you can get more test coverage by mocking HTTP callouts when processing JWTs.

**Where:** These changes are available in Enterprise, Performance, Unlimited, and Developer Editions.

**How:** For more information about these changes, see the Auth Namespace section in [Apex: New and Changed Items](#).

## Use the Token Exchange Flow with More Identity Providers

With new support for larger tokens, use the OAuth 2.0 token exchange flow with a wider range of third-party identity providers. When you send third-party tokens to Salesforce in the `subject_token` parameter, the value can be up to 10,000 characters long. Previously, the maximum length for values in this parameter was 2,000 characters.

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

**How:** With the token exchange flow, you configure an app to exchange a token issued by an identity provider for a Salesforce token. To initiate this exchange, your app sends a POST request to the `/services/oauth2/token` endpoint. The request includes the provider's token in the `subject_token` parameter.

SEE ALSO:

[Salesforce Help: Configure the Token Exchange Flow \(can be outdated or unavailable during release preview\)](#)

## Simultaneous Token Requests Are Blocked During the Refresh Token Flow

To reduce performance issues, we now prevent client apps from sending simultaneous token requests with the same refresh token when using the OAuth 2.0 refresh token flow. Previously, identical token requests sent at the same time didn't fail, but they did lead to system issues across Salesforce. To avoid disruptions, update integrations that use the refresh token flow to stop sending simultaneous, identical requests to the token endpoint. Improve the efficiency of your integrations by reusing access tokens instead of continually requesting new ones.

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

**How:** When using the refresh token flow, Salesforce processes one token request at a time. If your client sends another request while one is being processed, the Status column in the Login History displays Failed: Token request is already being processed.

To prevent the refresh token flow from failing intermittently, update your integrations.

- Avoid or reduce simultaneous calls to the token endpoint with the same refresh token. Instead, after your client obtains an access token from the refresh token flow, cache the token and reuse it.
- If you continue to make simultaneous, identical requests, which isn't recommended, develop a way to retry the requests when this error occurs.

SEE ALSO:

[Salesforce Help: OAuth 2.0 Refresh Token Flow for Renewed Sessions](#)

## Users Must Approve Access Every Time They Trigger the Device Flow

To improve security for the OAuth 2.0 device flow, we now prompt users to allow access to their Salesforce data every time they complete an action that initiates the flow. Before this change, for some integrations built with this flow, users who previously allowed an app to access their data sometimes weren't prompted for approval.

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

**How:** This change applies only if the Permitted Users policy for the connected app or external client app is set to All users may self-authorize. If the policy is set to Admin approved users are pre-authorized, users still aren't prompted for approval.

SEE ALSO:

[OAuth 2.0 Device Flow for IoT Integration](#)

## Refresh Token Rotation Now Works As Expected for Instances on Salesforce's First-Party Infrastructure

OAuth refresh token rotation now works as expected for all instances on Salesforce's first-party infrastructure. Previously, it didn't work for some instances on our first-party infrastructure. When this change takes effect, apps that are enabled for refresh token rotation work as expected, which can cause apps to break if they weren't developed properly. To avoid performance issues, update your integrations.

**Where:** This change is available in Lightning Experience and Salesforce Classic in all editions. This change applies only to instances that are hosted on Salesforce's first-party infrastructure. It doesn't apply to Hyperforce instances, where refresh token rotation always worked as expected.

**When:** The date when this change is available depends on your region. For sandboxes, this change is available on August 6, 2024 or August 7, 2024. For production orgs, this change is available on August 7, 2024 or August 8, 2024. To get the specific date for your region, contact Salesforce Customer Support.

**Why:** When you enable refresh token rotation for a connected app or external client app, Salesforce is supposed to issue a new refresh token and invalidate any old refresh and access tokens whenever you invoke the refresh token flow. However, before this fix, the feature didn't work as expected for some instances on Salesforce's first-party infrastructure and Salesforce behaved as if the feature was disabled. As a result, connected apps and external client apps with refresh token rotation enabled continued to issue the same refresh token and old tokens remained valid.

**How:** To prepare for this change, first [confirm whether your instance is located on Salesforce's first party-infrastructure](#). If it is, check whether you have any connected apps or external client apps with the OAuth setting Enable Refresh Token Rotation enabled. Choose an app that has this setting enabled and test your integrations by invoking the OAuth 2.0 refresh token flow at least twice. If Salesforce doesn't issue a new refresh token with each token request, and your client can't handle refresh token rotation, this change can impact you. To prevent your integrations from breaking, disable refresh token rotation for apps in production instances. After this change becomes available in your org, enable refresh token rotation for your apps in a sandbox and test that it works as expected before re-enabling it in production.

If you don't update impacted integrations before this change becomes available, users can get logged out earlier than expected. If you experience this issue for instances on Salesforce's first-party infrastructure after this change takes effect, disable refresh token rotation on connected apps and external client apps in production instances. Then, enable it again in a sandbox and retest it before implementing it in production.

#### SEE ALSO:

[Known Issue: Connected App Refresh Token Rotation doesn't work](#)

[Salesforce Help: OAuth 2.0 Refresh Token Flow for Renewed Sessions](#)

## Privacy Center

Review recent changes to Privacy Center's user interface and functionality.

#### IN THIS SECTION:

##### [Retain Data with Privacy Center](#)

Data retention is available in the new, platform-native version of Privacy Center. With data retention, you can copy records to an external data store at the same time that you mask or delete them. You can also view the externally retained records by setting up your retention store with Salesforce Connect. This feature becomes available on a rolling basis starting in August 2024.

##### [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.

## Retain Data with Privacy Center

Data retention is available in the new, platform-native version of Privacy Center. With data retention, you can copy records to an external data store at the same time that you mask or delete them. You can also view the externally retained records by setting up your retention store with Salesforce Connect. This feature becomes available on a rolling basis starting in August 2024.

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

 **Note:** Data retention isn't available in Government Cloud.

**When:** Data retention becomes available in different regions on a rolling basis starting in August 2024. Before using the feature, [check to see if it's supported in your region](#).

**Why:** To stay compliant with data privacy laws, you're sometimes required to delete or obfuscate customer data, or to retain it for a certain period. Now you can add data retention to your compliance strategy without using the managed-package version of Privacy Center.

The platform-native version of Privacy Center is the modernized, enhanced version that we recommend for all customers. Here are some advantages to consider.

- Your Privacy Center license includes data retention as an out-of-the-box feature, along with a certain amount of free storage.
- You can also easily provision a retention store for testing purposes in your sandbox.
- You can import privacy policies directly from a sandbox to a production org and vice versa. With this capability, you can test and deploy your retention implementation seamlessly.
- Privacy Center offers an updated and improved user interface compared to the managed-package version of Privacy Center.

**How:** Create a new Data Management or Right to Be Forgotten Policy, or edit an existing policy. Complete the usual setup steps for the policy type that you're working with. On the retention rules screen, select **Copy to Store**, and then select how you want to process individual record fields. You can choose not to copy certain fields to the retention store, or you can obfuscate the field values that are retained.

To view the records in your retention store from within Salesforce, set up the [Salesforce Connect adaptor for Privacy Center](#). To complete this process, you define your retention store as an external data source, and then you map the data in your retention store to external objects that are viewable in Salesforce.

SEE ALSO:

[Salesforce Help: Retain Records on an Object \(can be outdated or unavailable during release preview\)](#)

## 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.

- When a user cancels an in-progress job for a privacy policy, Salesforce prompts them to confirm the action with a warning. Canceling in-progress jobs can cause some records to be modified or unrecoverable. The updated warning message clarifies these risks.

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](#) (can be outdated or unavailable during release preview).

SEE ALSO:

[Salesforce Help: Use the Consent Event Stream \(can be outdated or unavailable during release preview\)](#)

## Salesforce Shield

Encrypt more Nonprofit Cloud data. Net Zero Cloud objects are compatible with Field Audit Trail. Event Log File Browser is generally available for easy access to event log files right from Setup. And say goodbye to third-party tools for digging into event logs. Event Monitoring's new event log object framework (beta) captures event data in standard objects that support direct queries via API.

IN THIS SECTION:

### [Data Detect](#)

Einstein Data Detect is now Data Detect.

### [Event Monitoring](#)

Explore and download all of your event log file data using the Event Log File Browser in Setup. Tailor your event log file data retention period to your needs, up to 1 year. Store and query all of your event data via the API by using Event Monitoring's Event Log Objects (beta). Capture detailed network performance metrics with the new UI Telemetry Timing events. Track redirections for your instanced URLs.

### [Field Audit Trail](#)

Add Net Zero Cloud objects to your Field Audit Trail retention policies.

### [Shield Platform Encryption](#)

Encrypt more Grantmaking Compliant Data Sharing records data. Gather statistics and apply active keys to data with fewer timeouts. Bring Your Own Key pages are compatible with assistive technologies. .

## Data Detect

Einstein Data Detect is now Data Detect.

## IN THIS SECTION:

[Einstein Data Detect Is Now Data Detect](#)

To better reflect our broader Salesforce product offerings, Einstein Data Detect is now called Data Detect. Product documentation and in-app wording are updated to reflect the new name. This name change doesn't change how Data Detect works or behaves. During the branding transition, it's possible that the previous product name still appears in a few Salesforce resources.

## Einstein Data Detect Is Now Data Detect

To better reflect our broader Salesforce product offerings, Einstein Data Detect is now called Data Detect. Product documentation and in-app wording are updated to reflect the new name. This name change doesn't change how Data Detect works or behaves. During the branding transition, it's possible that the previous product name still appears in a few Salesforce resources.

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

**Who:** The Data Detect managed package is available to customers who purchase the Salesforce Shield add-on subscription.

## SEE ALSO:

[Salesforce Help: Data Detect](#)

## Event Monitoring

Explore and download all of your event log file data using the Event Log File Browser in Setup. Tailor your event log file data retention period to your needs, up to 1 year. Store and query all of your event data via the API by using Event Monitoring's Event Log Objects (beta). Capture detailed network performance metrics with the new UI Telemetry Timing events. Track redirections for your instanced URLs.

## IN THIS SECTION:

[Query Low-Latency Event Data with Event Log Objects \(Beta\)](#)

Store and query all of your event data via the API with the new event log object framework (beta) that captures event data in standard objects.

[Access and Download Event Log File Data with the Event Log File Browser \(Generally Available\)](#)

Get easy access to all of your Event Log File data by using the Event Log File Browser directly in Setup without the need for third-party tools.

[Download Up to 1 Year of Event Log Files](#)

Adjust your event log file data retention period and download up to 1 year of event log file data in case of a security incident.

[Track Network Performance Metrics](#)

To maximize the efficiency of your applications, capture detailed network performance metrics with the new UI Telemetry Timing events. Use the Resource Timing event log file type to measure how long a browser takes to load specific application resources from a remote server. Use the Navigation Timing event log file type to track metrics related to page navigation, such as how long a browser takes to construct a page's Document Object Model (DOM).

[Identify Instanced Hostname Redirections](#)

To help you identify hard-coded instanced URLs, the `SOURCE_HOSTNAME` field on the Hostname Redirects event type now tracks redirections for these URLs. For example, if your Salesforce instance is IND76, legacy instanced hostnames include `ind76.salesforce.com`, `ind76.lightning.force.com`, and

**`MyDomainName--c.ind76.content.force.com`**. Redirections for legacy My Domain hostnames stop in Winter '25.

Previously, the `HOSTNAME_REDIRECT` field only tracked redirections from My Domain hostnames that didn't contain an instance name.


### [Track Pricing Data Using Event Log Files](#)

To get a complete overview of your pricing procedures being executed, use the new Pricing events. Use the Pricing event log file type to measure how long it takes to run the pricing APIs. Use the event log files to track metrics related to pricing status, the error codes generated, and the pricing procedure configured and used.

## Query Low-Latency Event Data with Event Log Objects (Beta)

Store and query all of your event data via the API with the new event log object framework (beta) that captures event data in standard objects.

**Where:** This change applies to Lightning Experience and Salesforce Classic (not available in all orgs) in Enterprise, Performance, and Unlimited 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](#).

**When:** Event log objects (beta) won't be functional for US East Hyperforce customers until at least June 2024.

**Who:** This change is only available to a subset of US East Hyperforce customers who purchased the Salesforce Shield or Salesforce Event Monitoring add-on subscriptions.

**How:** Access Event Log Objects via the API or through CRM Analytics.

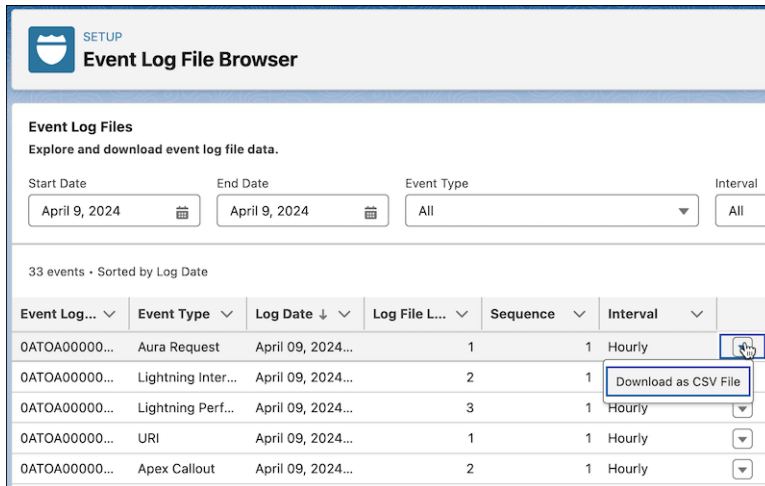
## Access and Download Event Log File Data with the Event Log File Browser (Generally Available)

Get easy access to all of your Event Log File data by using the Event Log File Browser directly in Setup without the need for third-party tools.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Event Monitoring is enabled.

**How:** From Setup, in the Quick Find box, enter *Event Log File Browser* and then select **Event Log File Browser**. To download event log file data, select a date range and, from the dropdown list next to the event log file, 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.



## SEE ALSO:

[Salesforce Help: Explore Event Log File Data using the Event Log File Browser \(can be outdated or unavailable during release preview\)](#)

## Download Up to 1 Year of Event Log Files

Adjust your event log file data retention period and download up to 1 year of event log file data in case of a security incident.

**Where:** This change applies to Lightning Experience and Salesforce Classic (not available in all orgs) in Enterprise, Performance, and Unlimited 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 Monitoring Settings* and then select **Event Monitoring Settings**. Enable the **Retain event log files** setting. Then, to specify the number of days to retain your data, use the `eventLogRetentionDuration` field on the EventSettings Metadata API type.

## Track Network Performance Metrics

To maximize the efficiency of your applications, capture detailed network performance metrics with the new UI Telemetry Timing events. Use the Resource Timing event log file type to measure how long a browser takes to load specific application resources from a remote server. Use the Navigation Timing event log file type to track metrics related to page navigation, such as how long a browser takes to construct a page's Document Object Model (DOM).

**Where:** This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Event Monitoring is enabled. The events are available in the API and in the Event Log Browser, 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.

## SEE ALSO:

[Object Reference for the Salesforce Platform: UI Telemetry Resource Timing Event Type \(can be outdated or unavailable during release preview\)](#)

[Object Reference for the Salesforce Platform: UI Telemetry Navigation Timing Event Type \(can be outdated or unavailable during release preview\)](#)



## Identify Instanced Hostname Redirections

To help you identify hard-coded instanced URLs, the `SOURCE_HOSTNAME` field on the Hostname Redirects event type now tracks redirections for these URLs. For example, if your Salesforce instance is IND76, legacy instanced hostnames include `ind76.salesforce.com`, `ind76.lightning.force.com`, and `MyDomainName--c.ind76.content.force.com`. Redirections for legacy My Domain hostnames stop in Winter '25. Previously, the `HOSTNAME_REDIRECT` field only tracked redirections from My Domain hostnames that didn't contain an instance name.

**Where:** This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions. The Hostname Redirects event is available in the API but not in the Event Monitoring Analytics app. This event is free for all customers with a 24-hour data retention period.

**How:** First, enable redirection logging. From Setup, in the Quick Find box, enter *My Domain*, and then select **My Domain**. In the Redirections section, click **Edit**. Select **Log Redirections**, and save your changes.

The screenshot shows the 'Redirections' configuration page in Salesforce. At the top, there are 'Save' and 'Cancel' buttons. The page is divided into several sections:

- Previous My Domain URL:** Displays `mycompany.my.salesforce.com with enhanced domains`. Below it is a 'Remove Previous My Domain' button with an information icon.
- My Domain URLs:** Contains three checked checkboxes:
  - Redirect previous My Domain URLs to your current My Domain (with an information icon)
  - Notify users before redirecting to the current My Domain URL
  - Log redirections** (with an information icon). This checkbox is highlighted with a red box in the original image.
- Instanced URL:** Includes a descriptive text: 'Specify the behavior when a user attempts to access this org via a URL that starts with `https://ind76.salesforce.com`. If a My Domain change is in progress, this setting also applies to the provisioned domains for this org.' Below this text are three radio button options:
  - Redirect to the same page within the domain
  - Redirect with a warning to the same page within the domain
  - Don't redirect (recommended)** (selected)

At the bottom of the page, there are 'Save' and 'Cancel' buttons.

After you save your changes, Salesforce produces a log for the Hostname Redirects event type in the next daily run. Then you can access the Hostname Redirects event type through the API using a tool of your choice.

Alternatively, you can download the latest incremental daily hostname redirections log by clicking **Download Redirections Log** from the My Domain Setup page.

**Redirections** Edit

Previous My Domain URL **mycompany.my.salesforce.com** with enhanced domains

My Domain URLs

- Redirect previous My Domain URLs to your current My Domain i
- Notify users before redirecting to the current My Domain URL
- Log redirections i

**Download Redirections Log**

Instanced URL Specify the behavior when a user attempts to access this org via a URL that starts with `https://ind76.salesforce.com`. If a My Domain change is in progress, this setting also applies to the provisioned domains for this org.  
**Don't redirect (recommended)**

Edit

SEE ALSO:

[Object Reference for the Salesforce Platform: Hostname Redirects Event Type](#) (can be outdated or unavailable during release preview)

[Salesforce Help: Prepare for the End of Redirections for Non-Enhanced Domains](#) (can be outdated or unavailable during release preview)

## Track Pricing Data Using Event Log Files

To get a complete overview of your pricing procedures being executed, use the new Pricing events. Use the Pricing event log file type to measure how long it takes to run the pricing APIs. Use the event log files to track metrics related to pricing status, the error codes generated, and the pricing procedure configured and used.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Event Monitoring and Salesforce Pricing is enabled.

## Field Audit Trail

Add Net Zero Cloud objects to your Field Audit Trail retention policies.

## Audit Net Zero Cloud Field Changes

Extend the data retention period for your archived Net Zero Cloud field history values. Field Audit Trail customers can enable field history tracking for all Net Zero Cloud objects with a single click, saving you time during the setup process.

**Where:** This change applies to Salesforce Classic ([not available in all orgs](#)), Lightning Experience, and the Salesforce app in Contact Manager, Essentials, Group, Professional, Enterprise, Performance, Unlimited, Developer, and Database.com editions. Standard Objects aren't available in Database.com.

**Who:** This feature is available for customers who purchase Field Audit Trail or Salesforce Shield add-on subscriptions and have Net Zero Cloud enabled.

**How:** In Setup, on the Field History Tracking page, click Set Net Zero Cloud Defaults. Field Audit Trail retains data for 18 months by default. To retain data for longer, add Net Zero Cloud objects individually to your data retention policy.

#### SEE ALSO:

[Track Value Changes in Key Objects and Fields](#)

[Track Value Changes in Key Objects and Fields](#)

[Monitor Net Zero Cloud Changes with Field History Tracking](#)

[Salesforce Help: Default Net Zero Cloud Object Fields to Track \(can be outdated or unavailable during release preview\)](#)

[Field Audit Trail Implementation Guide: Field Audit Trail \(can be outdated or unavailable during release preview\)](#)

## Shield Platform Encryption

Encrypt more Grantmaking Compliant Data Sharing records data. Gather statistics and apply active keys to data with fewer timeouts. Bring Your Own Key pages are compatible with assistive technologies. .

#### IN THIS SECTION:

[Encrypt Search Index Keys with Manageable Root Keys](#)

Improvements to the Shield Platform Encryption architecture give you more ways to control the key material that encrypt search indexes. Salesforce has always used envelope encryption to secure your tenant secrets and customer-supplied keys. Now you can control the root key that generates and encrypts a data encryption key (DEKs) for your search indexes.

[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 Individual Application Task Participant object.

[See Fewer Encryption Statistics and Sync Timeouts](#)

Gather encryption statistics and sync historical data with your active Shield Platform Encryption key faster. Improved indexing now handles large volumes of data more efficiently, resulting in fewer timeouts and faster processing times. Spend less time waiting for key management tasks to complete and more time working through your to-do list.

[Access the Bring Your Own Key Pages with Assistive Technologies](#)

The Bring Your Own Key pages in Setup now use Lightning Experience styling. Better contrast makes the page easier to read, and users can navigate tables and interactive page elements more easily with keyboard controls. These pages also now include clearer labels and language support for screen readers.

[Encrypt Application Form Seller Item Fields](#)

Client application form and a seller product sometimes contain sensitive or personally identifiable information (PII). On the Application Form Seller Item object, you can now encrypt the Vehicle Identification Number, Engine Number, Vehicle Registration Number, Property Address, Scheduled Delivery Date, Property Unit Identifier, Make, Model, and Trim fields.

[Encrypt Party Income and Party Expense Fields](#)

Client expense and income records sometimes contain sensitive or personally identifiable information (PII). On the Party Income object, you can now encrypt the Income As Of Date field. On the Party Expense object, encrypt the Expenses As Of Date field.

[Encrypt Party Financial Liability, Party Financial Asset, and Party Financial Asset Lien Fields](#)

Client financial, asset, and lien records sometimes contain sensitive or personally identifiable information (PII). On the Party Financial Liability object, you can now encrypt the Start Date, Term, Lender, and Liability Account Identifier fields. On the Party Financial Asset object, encrypt the OwnershipStartDateTime, ValuationDate, Description, SerialNumber, MakeName, ModelName, and ModelYear fields. On the Party Financial Asset Lien object, encrypt the Lien Holder and Maturity Date fields.

## Encrypt Search Index Keys with Manageable Root Keys

Improvements to the Shield Platform Encryption architecture give you more ways to control the key material that encrypt search indexes. Salesforce has always used envelope encryption to secure your tenant secrets and customer-supplied keys. Now you can control the root key that generates and encrypts a data encryption key (DEKs) for your search indexes.

**Where:** This change applies to Lightning Experience and Salesforce Classic (not available in all orgs) in Enterprise, Performance, Unlimited, and Developer editions.

**When:** This change is available on a rolling basis throughout the Summer '24 release.

**Who:** Available to customers who purchased a Salesforce Shield or Shield Platform Encryption add-on subscription.

**How:** If you aren't already encrypting search indexes, turn on encryption for search indexes on the Encryption Settings page. If you're already encrypting search indexes, when your org's search indexes are upgraded to support root keys, we generate a Salesforce root key and DEK for you. Both keys are visible on the Key Management page in Setup. The new DEK is applied to new indexes as they're added. Just like other keys in Salesforce, you can rotate root keys and DEKs for control over your key lifecycle and encryption policy.

## 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 Individual Application Task 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 Individual Application Task Participant object. You can encrypt the Comments field with the probabilistic, case-sensitive deterministic, or case-insensitive deterministic encryption schemes.

SEE ALSO:

[Salesforce Help: Which Standard Fields Can I Encrypt? \(can be outdated or unavailable during release preview\)](#)

## See Fewer Encryption Statistics and Sync Timeouts

Gather encryption statistics and sync historical data with your active Shield Platform Encryption key faster. Improved indexing now handles large volumes of data more efficiently, resulting in fewer timeouts and faster processing times. Spend less time waiting for key management tasks to complete and more time working through your to-do list.

**Where:** This change applies to Lightning Experience and Salesforce Classic (not available in all orgs) in Enterprise, Performance, Unlimited, and Developer editions.

**Who:** Available to customers who purchased the Salesforce Shield or Shield Platform Encryption add-on subscription.

## Access the Bring Your Own Key Pages with Assistive Technologies

The Bring Your Own Key pages in Setup now use Lightning Experience styling. Better contrast makes the page easier to read, and users can navigate tables and interactive page elements more easily with keyboard controls. These pages also now include clearer labels and language support for screen readers.

**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 add-on subscription.

SEE ALSO:

[Salesforce Help: Bring Your Own Key \(BYOK\) \(can be outdated or unavailable during release preview\)](#)

## Encrypt Application Form Seller Item Fields

Client application form and a seller product sometimes contain sensitive or personally identifiable information (PII). On the Application Form Seller Item object, you can now encrypt the Vehicle Identification Number, Engine Number, Vehicle Registration Number, Property Address, Scheduled Delivery Date, Property Unit Identifier, Make, Model, and Trim 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 with the Salesforce Shield or Shield Platform Encryption add-on subscriptions.

**How:** On the Encryption Settings page, click **Select Fields**. Click **Edit**, and then select the fields of the Application Form Seller Item object that you want to encrypt.

## Encrypt Party Income and Party Expense Fields

Client expense and income records sometimes contain sensitive or personally identifiable information (PII). On the Party Income object, you can now encrypt the Income As Of Date field. On the Party Expense object, encrypt the Expenses As Of Date field.

**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 with the Salesforce Shield or Shield Platform Encryption add-on subscriptions.

**How:** On the Encryption Settings page, click **Select Fields**. Click **Edit**, and then select the fields of the Party Income and Party Expense objects that you want to encrypt.

## Encrypt Party Financial Liability, Party Financial Asset, and Party Financial Asset Lien Fields

Client financial, asset, and lien records sometimes contain sensitive or personally identifiable information (PII). On the Party Financial Liability object, you can now encrypt the Start Date, Term, Lender, and Liability Account Identifier fields. On the Party Financial Asset object, encrypt the OwnershipStartDateTime, ValuationDateTime, Description, SerialNumber, MakeName, ModelName, and ModelYear fields. On the Party Financial Asset Lien object, encrypt the Lien Holder and Maturity Date 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 with the Salesforce Shield or Shield Platform Encryption add-on subscriptions.

**How:** On the Encryption Settings page, click **Select Fields**. Click **Edit**, and then select the fields of the Party Financial Liability, Party Financial Asset, Party Financial Asset Lien objects that you want to encrypt.

## Security Center

View pertinent data with enhanced charts. Access your Data Cloud encryption policy status from the Security Center Encryption Policy metric. Create custom metrics (beta) in Security Center.

## IN THIS SECTION:

[Create Custom Metrics in Security Center \(Beta\)](#)

Effortlessly monitor vital data from custom objects to bolster your organization's security posture by creating your own custom metrics that you can monitor from your Security Center dashboard.

[View Pertinent Data with an Enhanced Security Center Dashboard Page](#)

Quickly view relevant data with more engaging Security Center charts within your Security Landscape, which offers an improved Security Center dashboard page experience.

[View Your Data Cloud Encryption Policy Status from the Security Center Encryption Policy Metric](#)

Get full visibility into how your organization is using Platform Encryption by conveniently accessing your Data Cloud encryption key status from the Encryption Policies metric in Security Center.


[View Fields That Are Encrypted Under Your Shield Platform Encryption Policy](#)

With the Field Level Encryption metric, conveniently access fields encrypted under your Shield Platform Encryption policy from Security Center.

## Create Custom Metrics in Security Center (Beta)

Effortlessly monitor vital data from custom objects to bolster your organization's security posture by creating your own custom metrics that you can monitor from your Security Center dashboard.

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

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

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

**How:** To create a custom metric with a custom object, go to the Custom Metrics tab in Security Center.

The screenshot shows the 'Custom Metric' configuration form. At the top, there are navigation tabs: Dashboard, Connected Tenants, Alert Settings, Security Policies, and Custom Metrics (Beta). The form has a title 'Custom Metric' and a close button (X). It contains the following fields:

- Custom Metric Name:** A text input field.
- Custom Object API Name:** A text input field.
- Description:** A larger text input field.
- Configuration:**
  - Section:** A dropdown menu currently set to 'Custom'.
  - Display Type:** A dropdown menu currently set to 'Non-Diff'.

At the bottom right, there are 'Cancel' and 'Save' buttons.

SEE ALSO:

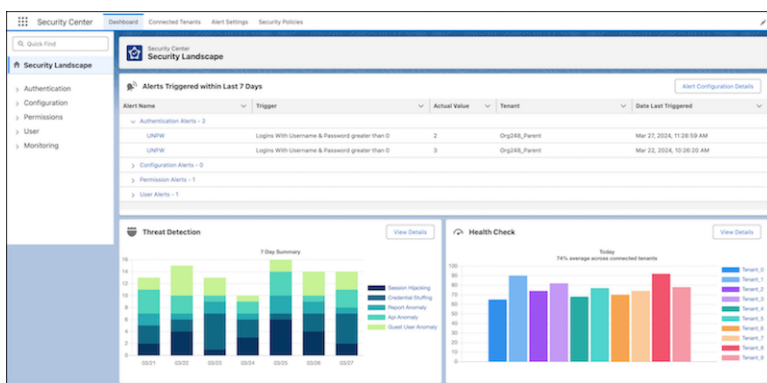
[Salesforce Help: Security Center Metrics \(can be outdated or unavailable during release preview\)](#)

## View Pertinent Data with an Enhanced Security Center Dashboard Page

Quickly view relevant data with more engaging Security Center charts within your Security Landscape, which offers an improved Security Center dashboard page experience.

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

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



## View Your Data Cloud Encryption Policy Status from the Security Center Encryption Policy Metric

Get full visibility into how your organization is using Platform Encryption by conveniently accessing your Data Cloud encryption key status from the Encryption Policies metric in Security Center.

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

**Who:** This change is available to customers who purchased Shield Platform Encryption and Security Center add-on subscriptions.

**How:** Monitor Encryption Policies from the Security Center dashboard via the Configuration category in your Security Landscape.

SEE ALSO:

[Salesforce Help: Security Center Metrics \(can be outdated or unavailable during release preview\)](#)

## View Fields That Are Encrypted Under Your Shield Platform Encryption Policy

With the Field Level Encryption metric, conveniently access fields encrypted under your Shield Platform Encryption policy from Security Center.

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

**Who:** This change applies to editions that have the Shield Platform Encryption and the Security Center add-on subscriptions.

**How:** Monitor this Encryption Policy metric from your Security Center dashboard via the Configuration category in Security Landscape.

## Other Security Changes

To prepare for two release updates, view blocked redirections and resources in an updated Setup page. Reduce emails about certificate expirations, and create certificates with a 3072-bit key length. And refresh Named Credentials access tokens based on non-standard HTTP status codes.

IN THIS SECTION:

### [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.

### [Adopt Updated Content Security Policy \(CSP\) Directives \(Release Update\)](#)

To help protect your org from cross-site scripting and other code injection attacks, Salesforce updated the delivered CSP directives for Lightning pages. This change can prevent externally hosted fonts and images from loading. It can also prevent external websites from loading within an iframe on your Lightning pages. To prepare for this change, review the impact and update your trusted URLs. This update is available starting in Summer '24 and was scheduled to be enforced in Winter '25, but we postponed the enforcement date to Spring '25.

### [Review and Resolve Blocked External Redirections](#)

Reduce your research and resolution time for allowing external redirections, including cross-org redirections. The Trusted URL and Browser Policy Violations Setup page shows blocked external redirections and content security policy (CSP) violations in one view. Previously, this Setup page was called CSP Violations.

### [IdeaExchange Delivered: Limit Who Receives Notifications About Certificate Expiration](#)

By popular demand, you now have more control over who gets certificate expiration email notifications. Assign the new Receive Certificate Expiration Notifications user permission to the admins who manage certificates. Also, notification emails now include more details about how to update certificates before they expire. We delivered this feature thanks to your ideas on IdeaExchange.

### [Control Which HTTP Status Codes Refresh Access Tokens for Named Credentials](#)

Now you can account for external systems that return non-standard HTTP status codes when callouts from Salesforce use invalid or expired credentials. In addition to the standard 401 response, you can specify other 4xx HTTP status codes so that Salesforce can refresh access tokens when the external system returns these codes.



### [Confirm Access to External Systems When Named Credentials Use the OAuth 2.0 Browser Flow](#)

For added security, there's a new step to authenticate to an external system for external credentials that use OAuth 2.0 authentication with the Browser Flow. Now, after you authenticate, you must confirm that you want your Salesforce org to interact with the external system on your behalf. Previously, the final step was to authenticate into the external system.

### [Create 3072-Bit Sized Certificates](#)

Sometimes you need a certificate stronger than a 2048-bit certificate but without the performance limitation of a 4096-bit certificate. Now you can create self-signed or CA (Certificate Authority)-signed certificates with a 3072-bit key length.

### [Audit More Changes to Salesforce Sites and Visualforce Sites](#)

Track changes for more Salesforce Sites and Visualforce sites settings in Site History. Newly tracked items include the site default record owner, the option to cache public Visualforce pages, guest access to the Support API, and more. Also, if you haven't enabled Salesforce Sites, the Setup Audit Trail now tracks when you register the Salesforce Sites domain and when a new site is created. And two existing Setup Audit Trail messages are easier to understand.

### [Enjoy Faster Load Times for Cached Salesforce Site Pages](#)

To improve page load times, the caching behavior is updated for public Salesforce Site pages.

### [The BrowserId\\_sec Cookie Was Removed](#)

The BrowserId\_sec cookie is no longer rendered in Salesforce because the BrowserId cookie serves the same purpose. Also, for clarity, we updated *Salesforce Help* to reflect where the BrowserId cookie is rendered.

### [Visualforce Section Header Components Are Secure by Default](#)

By default, only commonly used, secure HTML elements are evaluated in the `<apex:sectionHeader>` component's `description` attribute. Uncommon HTML elements, insecure attributes, and JavaScript are removed.

## 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:** To identify the impacted redirections, allowlist URLs for your other Salesforce orgs, and test this change, see [Trust Redirections to Your Other Salesforce Orgs](#) in Salesforce Help.

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:


[Release Updates](#)

## Adopt Updated Content Security Policy (CSP) Directives (Release Update)

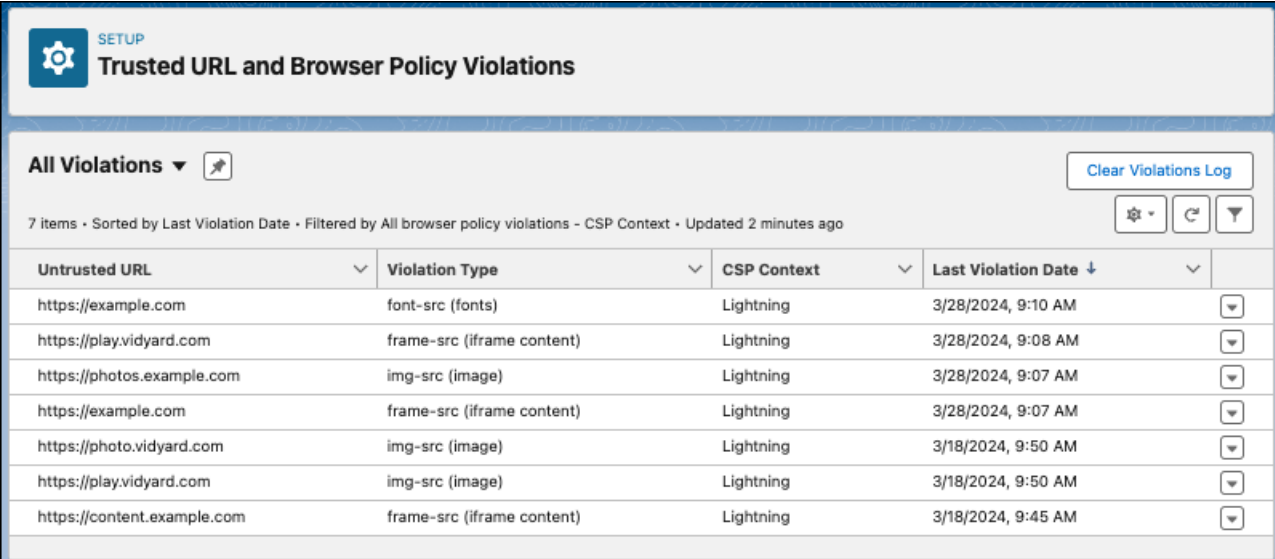
To help protect your org from cross-site scripting and other code injection attacks, Salesforce updated the delivered CSP directives for Lightning pages. This change can prevent externally hosted fonts and images from loading. It can also prevent external websites from loading within an iframe on your Lightning pages. To prepare for this change, review the impact and update your trusted URLs. This update is available starting in Summer '24 and was scheduled to be enforced in Winter '25, but we postponed the enforcement date to Spring '25.

**Where:** This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Developer, and Unlimited editions. The Trusted URL and Browser Policy Violations Setup page is available only in Lightning Experience.

**When:** This release update is postponed until Spring '25. In orgs created in Summer '24 and later, this release update is enabled by default. To get the major release upgrade date for your instance, go to [Trust Status](#), search for your instance, and then click the maintenance tab.

 **Note:** In August 2024, Salesforce plans to recalibrate the sampling process that identifies CSP violations. That recalibration can result in newly detected violations. If you previously completed this release update, we recommend that you review CSP violations in the Trusted URL and Browser Policy Violations list in Setup again in September 2024.

**How:** To identify the impacted redirections, go to the Trusted URL and Browser Policy Violations Setup page and filter the list on Violation Type. Use the equals operator and select **img-src (image)**, **frame-src (iframe content)**, and **font-src (fonts)**. Then, to allow a CSP directive for a URL, add the untrusted URL to the Trusted URLs allowlist.



| Untrusted URL               | Violation Type             | CSP Context | Last Violation Date |
|-----------------------------|----------------------------|-------------|---------------------|
| https://example.com         | font-src (fonts)           | Lightning   | 3/28/2024, 9:10 AM  |
| https://play.vidyard.com    | frame-src (iframe content) | Lightning   | 3/28/2024, 9:08 AM  |
| https://photos.example.com  | img-src (image)            | Lightning   | 3/28/2024, 9:07 AM  |
| https://example.com         | frame-src (iframe content) | Lightning   | 3/28/2024, 9:07 AM  |
| https://photo.vidyard.com   | img-src (image)            | Lightning   | 3/18/2024, 9:50 AM  |
| https://play.vidyard.com    | img-src (image)            | Lightning   | 3/18/2024, 9:50 AM  |
| https://content.example.com | frame-src (iframe content) | Lightning   | 3/18/2024, 9:45 AM  |

To enable this change for testing, from the Session Settings Setup page, enable **Adopt updated CSP directives**.

To review this update, from Setup, in the Quick Find box, enter *Release Updates*, and then select **Release Updates**. For Adopt Updated Content Security Policy (CSP) Directives, follow the testing and activation steps.

SEE ALSO:

[Salesforce Help: Manage Trusted URL and Browser Policy Violations \(can be outdated or unavailable during release preview\)](#)

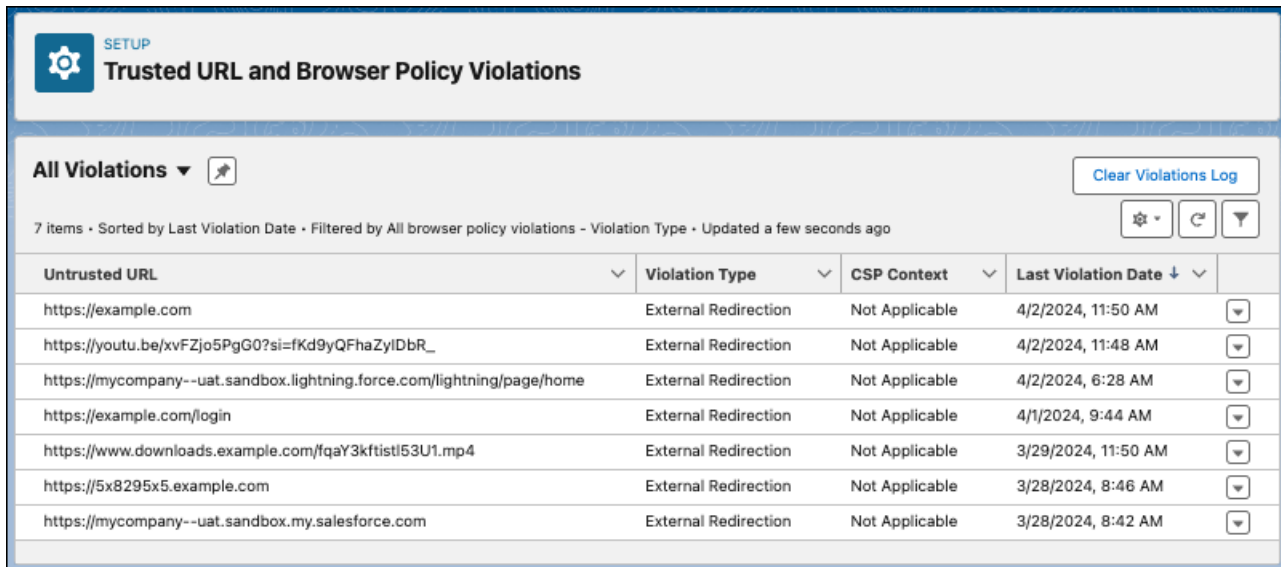
[Knowledge Article: View CSP Violations for the Adopt Updated Content Security Policy \(CSP\) Directives Release Update Release Updates](#)

## Review and Resolve Blocked External Redirections

Reduce your research and resolution time for allowing external redirections, including cross-org redirections. The Trusted URL and Browser Policy Violations Setup page shows blocked external redirections and content security policy (CSP) violations in one view. Previously, this Setup page was called CSP Violations.

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

**How:** From Setup, in the Quick Find box, enter *Trusted URL and Browser Policy Violations*, and then select **Trusted URL and Browser Policy Violations**. To view blocked external redirections, filter the list on the External Redirections violation type.



| Untrusted URL                                                          | Violation Type       | CSP Context    | Last Violation Date |
|------------------------------------------------------------------------|----------------------|----------------|---------------------|
| https://example.com                                                    | External Redirection | Not Applicable | 4/2/2024, 11:50 AM  |
| https://youtu.be/xvFZjo5PgG0?si=fKd9yQFhaZyIDbR_                       | External Redirection | Not Applicable | 4/2/2024, 11:48 AM  |
| https://mycompany--uat.sandbox.lightning.force.com/lightning/page/home | External Redirection | Not Applicable | 4/2/2024, 6:28 AM   |
| https://example.com/login                                              | External Redirection | Not Applicable | 4/1/2024, 9:44 AM   |
| https://www.downloads.example.com/fqaY3kftistl53U1.mp4                 | External Redirection | Not Applicable | 3/29/2024, 11:50 AM |
| https://5x8295x5.example.com                                           | External Redirection | Not Applicable | 3/28/2024, 8:46 AM  |
| https://mycompany--uat.sandbox.my.salesforce.com                       | External Redirection | Not Applicable | 3/28/2024, 8:42 AM  |

SEE ALSO:

[Salesforce Help: Manage Trusted URL and Browser Policy Violations \(can be outdated or unavailable during release preview\)](#)



## Limit Who Receives Notifications About Certificate Expiration

By popular demand, you now have more control over who gets certificate expiration email notifications. Assign the new Receive Certificate Expiration Notifications user permission to the admins who manage certificates. Also, notification emails now include more details about how to update certificates before they expire. We delivered this feature thanks to your ideas on IdeaExchange.

**Where:** This change applies to Lightning Experience and Salesforce Classic (not available in all orgs) in Enterprise, Performance, Unlimited, and Developer editions.

**Why:** When you assign the new system permission to at least one admin, all other admins see fewer certificate-related emails in their inboxes. And admins that you designate to receive expiration notifications are better informed about how to handle impending certificate expirations.

**How:** In Setup, add the **Receive Certificate Expiration Notifications** to a new permission set. Then assign that permission set to a user. Users with the permission receive emails at 60, 30, and 10 days before a certificate expires. To prevent service interruptions caused by expired certificates, we still send email notifications to all users with the System Administrator profile or the Modify All Data permission the day before and the day of a certificate's expiration.

If you don't assign this permission to anyone, all users with either the System Administrator profile or the Modify All Data system permission continue to receive all certificate expiration emails. If you don't want all of these users to continue receiving certificate expiration emails, assign the **Receive Certificate Expiration Notifications** to at least one user.

SEE ALSO:

[Salesforce Help: Set Expired Certificate Notification Permission \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Manage Expired Certificates \(can be outdated or unavailable during release preview\)](#)

## Control Which HTTP Status Codes Refresh Access Tokens for Named Credentials

Now you can account for external systems that return non-standard HTTP status codes when callouts from Salesforce use invalid or expired credentials. In addition to the standard 401 response, you can specify other 4xx HTTP status codes so that Salesforce can refresh access tokens when the external system returns these codes.

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

**How:** From Setup, in the Quick Find box, enter *Named Credentials*, and then select **Named Credentials**. Create or edit an external credential, and in the Additional Status Codes for Token Refresh field, enter 4xx status codes, like *400* or *403*.

SEE ALSO:

[Salesforce Help: Create or Edit an External Credential \(can be outdated or unavailable during release preview\)](#)

## Confirm Access to External Systems When Named Credentials Use the OAuth 2.0 Browser Flow

For added security, there's a new step to authenticate to an external system for external credentials that use OAuth 2.0 authentication with the Browser Flow. Now, after you authenticate, you must confirm that you want your Salesforce org to interact with the external system on your behalf. Previously, the final step was to authenticate into the external system.

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

**How:** From Setup, in the Quick Find box, enter *Named Credentials*, and then select **Named Credentials**. Create or edit an external credential that uses the OAuth 2.0 authentication protocol with the Browser Flow, create a principal, and authenticate into the external system. Return to Salesforce and confirm that you want to allow Salesforce to access the external system.

SEE ALSO:

[Salesforce Help: Create or Edit an OAuth External Credential with the Browser Flow \(can be outdated or unavailable during release preview\)](#)

## Create 3072-Bit Sized Certificates

Sometimes you need a certificate stronger than a 2048-bit certificate but without the performance limitation of a 4096-bit certificate. Now you can create self-signed or CA (Certificate Authority)-signed certificates with a 3072-bit key length.

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

**How:** In the Certificate and Key Management page of Setup, both the Create Self-Signed Certificate and Create CA-Signed Certificates forms now have options for 2048-bit, 3072-bit, and 4096-bit certificate sizes. The 2048-bit and 3072-bit certificates expire in 1 year. The 4096-bit certificate expires in 2 years, and it's still the only certificate we recommend for use with the Shield Platform Encryption BYOK (Bring Your Own Keys) feature.

SEE ALSO:

[Salesforce Help: Shield Platform Encryption Bring Your Own Keys \(BYOK\) \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Certificates and Keys \(can be outdated or unavailable during release preview\)](#)

## Audit More Changes to Salesforce Sites and Visualforce Sites

Track changes for more Salesforce Sites and Visualforce sites settings in Site History. Newly tracked items include the site default record owner, the option to cache public Visualforce pages, guest access to the Support API, and more. Also, if you haven't enabled Salesforce Sites, the Setup Audit Trail now tracks when you register the Salesforce Sites domain and when a new site is created. And two existing Setup Audit Trail messages are easier to understand.

**Where:** This change applies to Salesforce Sites and [Visualforce sites](#) in Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

**How:** To view the Setup Audit Trail, from Setup, in the Quick Find box, enter *Setup Audit Trail*, and then select **Setup Audit Trail**. In addition to newly tracked audit trail actions for when you register the Salesforce Sites domain and when a new site is created, the Audit Trail message for accepting the Salesforce Sites terms and conditions is improved. Also, the audit trail action is clearer for enabling or disabling the setting Allow using standard external profiles for self-registration, user creation, and login. Here are examples of the new and improved audit trail events.

| View Setup Audit Trail    |                                            |                         |                                                                                                                            |              |                 |
|---------------------------|--------------------------------------------|-------------------------|----------------------------------------------------------------------------------------------------------------------------|--------------|-----------------|
| Date                      | User                                       | Source Namespace Prefix | Action                                                                                                                     | Section      | Delegate User ? |
| 3/26/2024, 3:11:16 PM PDT | <a href="#">purnima.jain@mycompany.com</a> |                         | Enabled the Salesforce Sites option Allow using standard external profiles for self-registration, user creation, and login |              |                 |
| 3/26/2024, 3:11:02 PM PDT | <a href="#">purnima.jain@mycompany.com</a> |                         | Changed profile Support Profile: UnderConstruction Visualforce page access was enabled                                     | Manage Users |                 |
| 3/26/2024, 3:11:02 PM PDT | <a href="#">purnima.jain@mycompany.com</a> |                         | Changed profile Support Profile: SiteTemplate Visualforce page access was enabled                                          | Manage Users |                 |
| 3/26/2024, 3:11:01 PM PDT | <a href="#">purnima.jain@mycompany.com</a> |                         | Created Salesforce Site support (ID: [0DMZ70000000Fv])                                                                     | Sites        |                 |
| 3/26/2024, 3:11:01 PM PDT | <a href="#">purnima.jain@mycompany.com</a> |                         | Registered the Salesforce Sites domain mycompany.my.salesforce-sites.com                                                   | Sites        |                 |
| 3/26/2024, 3:11:01 PM PDT | <a href="#">purnima.jain@mycompany.com</a> |                         | Accepted the Salesforce Sites terms and conditions                                                                         | Sites        |                 |

To view changes made to site settings, use the Site History related list.

| Site History       |                              |                                                                                                                                                                  |
|--------------------|------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Date               | User                         | Action                                                                                                                                                           |
| 3/26/2024, 3:30 PM | <a href="#">Purnima Jain</a> | Changed <b>Active</b> from false to true.                                                                                                                        |
| 3/26/2024, 3:28 PM | <a href="#">Purnima Jain</a> | Changed <b>Clickjack Protection Level</b> from Don't allow framing by any page (Most protection) to <b>Allow framing by the same origin only (Recommended)</b> . |
|                    |                              | Changed <b>Default Record Owner</b> from purnima.jain@mycompany.com to <b>anwar.ahmed@mycompany.com</b> .                                                        |
|                    |                              | Changed <b>Guest Access to the Support API</b> from false to true.                                                                                               |
|                    |                              | Changed <b>Cache public Visualforce pages</b> from false to true.                                                                                                |
|                    |                              | Changed <b>Redirect to custom domain</b> from false to true.                                                                                                     |
|                    |                              | Changed <b>Allow only required cookies for this site</b> from false to true.                                                                                     |
|                    |                              | Changed <b>Referrer URL Protection</b> from false to true.                                                                                                       |
|                    |                              | Changed <b>Enable Feeds</b> from false to true.                                                                                                                  |
| 3/26/2024, 3:11 PM | <a href="#">Purnima Jain</a> | Created.                                                                                                                                                         |
| 3/26/2024, 3:11 PM | <a href="#">Purnima Jain</a> | Changed <b>Custom Web Address</b> to mycompany.my.salesforce-sites.com/support                                                                                   |

SEE ALSO:

[Salesforce Help: Monitor Setup Changes with Setup Audit Trail \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: View Salesforce Sites History \(can be outdated or unavailable during release preview\)](#)

## Enjoy Faster Load Times for Cached Salesforce Site Pages

To improve page load times, the caching behavior is updated for public Salesforce Site pages.

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

SEE ALSO:

[Load Cached Visualforce Site Pages Faster](#)

## The BrowserId\_sec Cookie Was Removed

The BrowserId\_sec cookie is no longer rendered in Salesforce because the BrowserId cookie serves the same purpose. Also, for clarity, we updated *Salesforce Help* to reflect where the BrowserId cookie is rendered.

**Where:** This change applies to Lightning Experience, Salesforce Classic, and all versions of the Salesforce mobile app in all editions.

SEE ALSO:

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

## Visualforce Section Header Components Are Secure by Default

By default, only commonly used, secure HTML elements are evaluated in the `<apex:sectionHeader>` component's `description` attribute. Uncommon HTML elements, insecure attributes, and JavaScript are removed.

**Where:** This change applies to Lightning Experience, Salesforce Classic (not available in all orgs), and all versions of the Salesforce mobile app in all editions.

**How:** For more information about this change, see [Updated Default Behavior of Visualforce Section Header Components](#).

# Service

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

IN THIS SECTION:

[Discover Service Capabilities with My Service Journey \(Beta\)](#)

Discover how to take your Service Cloud implementation from good to great with My Service Journey. Get the Salesforce point of view on how to achieve your business goals for different Service areas, like the Help Site or Agent Console. With My Service Journey, you can explore Service Cloud capabilities based on your business goals, edition, what's new, whether it's an Einstein feature, and more.

[Einstein for Service](#)

Check out new Einstein for Service features that increase agent productivity by putting AI insights, summaries, and recommendations directly in the flow of work.

[Service Intelligence](#)

Check out new Service Intelligence features that help you reduce costs and improve customer service.

[Service Catalog](#)

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

### Channels

Learn about Summer '24 improvements to Email-to-Case, Messaging, and Service Cloud Voice.

### Knowledge

Check out Unified Knowledge's general availability and other features that help simplify knowledge management.

### Routing

Omni-Channel users can now complete work from their mobile device. To avoid disconnecting calls, messaging sessions, or other work, you can choose for all agents to remain logged in to their original Omni-Channel sessions when subsequent Salesforce tabs or windows are opened.

### Feedback Management

Check out the enhanced data mapper page.

### Scheduled Reminders

Check out scheduled reminders for upcoming events and occasions.


### Industries in Service Cloud

Check out Industries features for Service Cloud that enhance the service experience and assist in automating complex decisions.

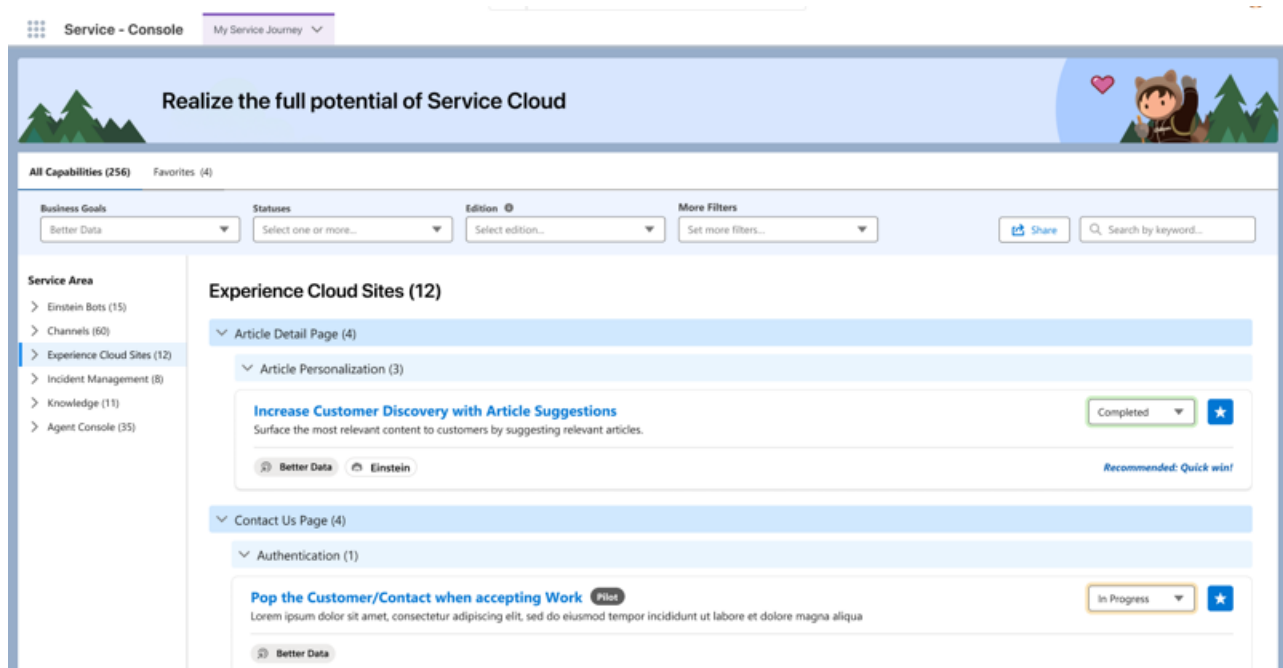
## Discover Service Capabilities with My Service Journey (Beta)

Discover how to take your Service Cloud implementation from good to great with My Service Journey. Get the Salesforce point of view on how to achieve your business goals for different Service areas, like the Help Site or Agent Console. With My Service Journey, you can explore Service Cloud capabilities based on your business goals, edition, what's new, whether it's an Einstein feature, and more.

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

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

**How:** Launch My Service Journey from the App Launcher. For enhanced exploration of Service Cloud capabilities, add My Service Journey to your console app's navigation menu. This pins capabilities as tabs for quicker access.



The screenshot displays the 'My Service Journey' interface within the 'Service - Console' environment. The header features the text 'Realize the full potential of Service Cloud' and a cartoon character. Below the header, there are navigation tabs for 'Service - Console' and 'My Service Journey'. The main content area is titled 'All Capabilities (256) Favorites (4)'. It includes a filter section with 'Business Goals' (set to 'Better Data'), 'Statuses' (set to 'Select one or more...'), 'Edition' (set to 'Select edition...'), and 'More Filters' (set to 'Set more filters...'). A search bar and a 'Share' button are also present. The left sidebar shows a 'Service Area' menu with options like 'Einstein Bots (15)', 'Channels (60)', 'Experience Cloud Sites (12)', 'Incident Management (8)', 'Knowledge (11)', and 'Agent Console (35)'. The main content area is titled 'Experience Cloud Sites (12)' and lists several capabilities:

- Article Detail Page (4)**
  - Article Personalization (3)**
    - Increase Customer Discovery with Article Suggestions** (Completed)
      - Surface the most relevant content to customers by suggesting relevant articles.
      - Tags: Better Data, Einstein
      - Recommend: Quick win!
- Contact Us Page (4)**
  - Authentication (1)**
    - Pop the Customer/Contact when accepting Work** (In Progress)
      - Placeholder text: Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.
      - Tag: Better Data

## Einstein for Service

Check out new Einstein for Service features that increase agent productivity by putting AI insights, summaries, and recommendations directly in the flow of work.

### IN THIS SECTION:

#### [Einstein Conversation Mining](#)

Transform conversation data into service insights with Einstein Conversation Mining.

#### [Einstein for Feedback Management](#)

Check out AI-generated response summaries, survey insights dashboard, and more.

#### [Einstein Work Summaries](#)

Check out Einstein Work Summaries for Messaging sessions in additional languages, get the gist of emails and email threads with Einstein Work Summaries for Email, and customize the Record Summary prompt template for Work Summaries in Copilot.

## Einstein Conversation Mining

Transform conversation data into service insights with Einstein Conversation Mining.

### IN THIS SECTION:

#### [Track Key Trends and Top Contact Reasons Across More Channels](#)

Build reports and identify common customer issues with Einstein Conversation Mining using data from Messaging for In-App and Web, in addition to Web-to-Case. Previously Einstein Conversation Mining only supported Email Message and Chat Transcript data.

### Track Key Trends and Top Contact Reasons Across More Channels

Build reports and identify common customer issues with Einstein Conversation Mining using data from Messaging for In-App and Web, in addition to Web-to-Case. Previously Einstein Conversation Mining only supported Email Message and Chat Transcript data.

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

**When:** This functionality is available starting in August 2024.

**How:** Go to Einstein Conversation Mining in Setup. When you create a report, select **Enhanced Conversations** or **Web-to-Case** for the channel. To use Enhanced Conversations, turn on **Data Cloud**.



### Create a Conversation Mining Report

**Let's Get Started**  
Select the basic details for your mining report, then refine the output later with segments. For email reports, you can build only from cases created using Email-to-Case.

**Channel**

✉ Email-to-Case

💬 Chat

💬 Enhanced Conversations ⓘ

📁 Web-to-Case

**Start with Your Report Name**

• Report Name

Cancel


○
○
Next

**What Name Should I Use?**

Give your report a descriptive name. Reports can contain different date ranges and segments. You can filter on conversations on any field inside the data set. Give more detailed names to more specific filters.

Examples:

- "January 2022: All Voice Calls"
- "Q2 2021 Report on EMEA Chats"
- "All chats longer than 5 minutes"



## SEE ALSO:

- [Salesforce Help: Enable Einstein Conversation Mining](#)
- [Salesforce Help: Build an Einstein Conversation Mining Report](#)
- [Salesforce Help: Compare Messaging Channel Capabilities in Service Cloud](#)

## Einstein for Feedback Management

Check out AI-generated response summaries, survey insights dashboard, and more.

## IN THIS SECTION:

### [Get Insightful Perspectives from Summaries of Survey Responses](#)

Unlock a comprehensive understanding of your survey data as generative AI summarizes responses, providing nuanced insights. Use data maps to create or update records with these summaries, which facilitate a thorough grasp of your audience's perspectives. For example, create summaries of responses from your customer base, partners, and prospects. The summaries are tailored to the question types of the survey, providing a comprehensive overview of audience insights.

### [Get Deeper Insights from Survey Responses](#)

Get the comprehensive Natural Language Processing Insights dashboard for a detailed analysis of survey results based on sentiments, extracted entities, and keyphrases. Use this analysis to assess trends and monitor frequently appearing keyphrases and entities in survey responses.

## Get Insightful Perspectives from Summaries of Survey Responses

Unlock a comprehensive understanding of your survey data as generative AI summarizes responses, providing nuanced insights. Use data maps to create or update records with these summaries, which facilitate a thorough grasp of your audience's perspectives. For example, create summaries of responses from your customer base, partners, and prospects. The summaries are tailored to the question types of the survey, providing a comprehensive overview of audience insights.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions with the Einstein for Service add-on where Feedback Management - Starter or Feedback Management - Growth is enabled. Einstein generative AI is available in Lightning Experience. To purchase the Einstein for Service add-on, contact your Salesforce account executive.

**Who:** To create survey response summaries, users need the Salesforce Advanced Features Starter permission or the Salesforce Surveys Advanced Features permission. They also need the Scoring Framework User permission and the Manage Natural Language Process Results permission. Additionally, users need the Survey Response Summaries configuration in the Industries AI Setup page.

**How:** Open a survey, click **Advanced Settings**, and then select **Survey Data Mapping**. Click **End Map**, and then select **Create Response Summary**. Select questions and summary length, and determine whether records are created every time or based on conditions.

**Survey Data Mapping** ← Back to Builder

**New Mapping** ×

ⓘ This tool has a limitation of 10 questions. If you have more than 10 questions in your survey, then carefully choose only 10 questions for which you need the summary. This tool uses generative AI, which can produce inaccurate or harmful responses. Review the output for accuracy and safety. [Learn More](#)

**\*Response Insights Type** ⓘ  
Response Summary

**\*Action Type**  
Create Record

**\*Target Object** ⓘ  
AI Natural Language Process ...

**Select Questions to Create Response Summary**  
2 of a maximum of 10 questions selected.

Page 1 | Page 2 | Page 3

**Page 1**

| Question                                                                                                                                          | Type               |
|---------------------------------------------------------------------------------------------------------------------------------------------------|--------------------|
| <input type="checkbox"/> How likely are you to recommend our technology products to a friend or colleague?                                        | Net Promoter Score |
| <input checked="" type="checkbox"/> What is your preferred method of communication?                                                               | Single Selection   |
| <input checked="" type="checkbox"/> Which of the following features do you find most valuable in our technology products? (Select all that apply) | Multiple Selection |
| <input type="checkbox"/> Please provide any additional comments or suggestions for improving our technology products.                             | Long Text          |
| <input type="checkbox"/> Please rate your overall satisfaction with our technology products on a scale of 1-5.                                    | Rating             |

**Summary Length** ⓘ  
 Long Summary  
 Short Summary

**Condition Type** ⓘ  
 Every time  
 Based on conditions

**Select Condition**  
All conditions are met

Logic Type: Response to Question    \* Question: On a scale of 1-10, how satisfied ar...    \* Operator: is less than    \* Response: 8

[+ Add Condition](#)

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

SEE ALSO:

[Salesforce Help: Create Summaries from Survey Responses \(can be outdated or unavailable during release preview\)](#)

[Einstein Features \(can be outdated or unavailable during release preview\)](#)

## Get Deeper Insights from Survey Responses

Get the comprehensive Natural Language Processing Insights dashboard for a detailed analysis of survey results based on sentiments, extracted entities, and keyphrases. Use this analysis to assess trends and monitor frequently appearing keyphrases and entities in survey responses.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Feedback Management, where NLP Insights is enabled.

**Who:** The dashboards are a part of the Customer Lifecycle Analytics app and are available to users with the Salesforce Feedback Management license.

**How:** Enable NLP Insights, and then install the Customer Lifecycle Analytics app from Analytics Studio to view the Natural Language Processing insights dashboard. To enable NLP insights, from Setup, in the Quick Find box, enter *Industries AI Setup*, and then select **Industries AI Setup**. Create a use case configuration for Entity and Keyphrase extraction.

## Einstein Work Summaries

Check out Einstein Work Summaries for Messaging sessions in additional languages, get the gist of emails and email threads with Einstein Work Summaries for Email, and customize the Record Summary prompt template for Work Summaries in Copilot.

### IN THIS SECTION:

#### [Catch Up with Midconversation Summaries in Five More Languages](#)

Conversation Catch-Up is now available in six languages: English, French, German, Italian, Japanese, and Spanish. Previously, it was available only in English.

#### [Catch Up Quickly On Emails with Einstein Work Summaries for Email \(Generally Available\)](#)

Save agents time with high-quality, concise AI-generated summaries of individual emails or entire email threads.

#### [Customize Your Work Summaries in Copilot \(Generally Available\)](#)

Now, you can customize how Einstein drafts Work Summaries in Copilot. Get summaries that meet your team's needs by adding your own formatting rules or restrictions to the prompt template that guides Einstein responses.




#### [Use Einstein Work Summaries in Additional Languages](#)

Now generally available, Einstein Work Summaries for Messaging Sessions supports three more languages: Dutch, Portuguese (Brazilian), and Spanish (Mexico).

## Catch Up with Midconversation Summaries in Five More Languages

Conversation Catch-Up is now available in six languages: English, French, German, Italian, Japanese, and Spanish. Previously, it was available only in English.

**Where:** This change applies to all enhanced messaging channels and Messaging for In-App and Web. [View required editions](#) It also applies to Voice channels in Lightning Experience in Enterprise and Unlimited editions with the Einstein for Service add-on. Available in Salesforce orgs with these [telephony models](#).

| Service Cloud Voice with Amazon Connect                                             | Service Cloud Voice with Partner Telephony from Amazon Connect                      | Service Cloud Voice with Partner Telephony                                            |
|-------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------|
|  |  |  |

All models of Service Cloud Voice are available as an add-on license in Service and Sales Clouds. To purchase the Einstein for Service add-on, contact your Salesforce Account Executive.

### SEE ALSO:

[Einstein Features](#)

[Salesforce Help: Show Agents and Supervisors Midconversation Summaries](#)

## Catch Up Quickly On Emails with Einstein Work Summaries for Email (Generally Available)

Save agents time with high-quality, concise AI-generated summaries of individual emails or entire email threads.

**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.

**How:** In Setup, search for Einstein Generative AI and verify that it's on. Then, search for the Einstein Work Summaries and toggle it on. From the Email tab, map Einstein's responses to Email Summary fields. Finally, turn on Email Message Summaries.

**Email**

### Map Responses to Salesforce Fields

To generate and save email summaries, verify that Email-to-Case is enabled. Then, map each Einstein response to custom fields on the Email Message and Case objects, and turn on Email Message Summaries to long text area fields.

Email Message Summaries  Active

**Field Mapping** [Edit](#)

| Einstein Responses                                                                                                                                                         | Target Fields                                                                                                           |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------|
| <p><b>Individual Email Summary</b><br/>Summary of a single case email</p> <hr/> <p><b>Combined Summary</b><br/>Summary of all emails associated with a particular case</p> | <p><b>Email Message Field Name</b><br/>Email Summary</p> <hr/> <p><b>Case Field Name</b><br/>Combined Email Summary</p> |

#### How does Einstein work?

Using natural language processing, Einstein identifies the most important information in a conversation. Einstein analyzes a conversation for key points and important details. The summary represents the overall conversation.

[Tell Me More About Einstein](#)

SEE ALSO:

[Einstein Features](#)

[Salesforce Help: Show Work Summaries for Email](#)

## Customize Your Work Summaries in Copilot (Generally Available)

Now, you can customize how Einstein drafts Work Summaries in Copilot. Get summaries that meet your team's needs by adding your own formatting rules or restrictions to the prompt template that guides Einstein responses.

**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.

**Who:** Einstein Copilot is available to users with the Use Einstein Copilot for Salesforce user permission.

To use Einstein Copilot actions that execute prompt templates, users must have the Execute Prompt Templates user permission.

**How:** This feature is available in Einstein Copilot through the Summarize Record standard copilot action. When a user asks Einstein to summarize a Messaging Session or Voice Call record, and the user has access to Einstein Work Summaries with the Use Einstein Copilot for Salesforce user permission and the Prompt Template user permission, the Summarize Record action uses a Summarize Messaging Session or Summarize Voice Call prompt template to generate the summary.

Under Prompt Templates in Prompt Builder are the Summarize Voice Call or Summarize Messaging Session templates with the Record Summary template type. To customize the Summarize Voice Call or Summarize Messaging Session template, create a prompt template or edit the preexisting prompt templates and save as new.

| Prompt Templates            |                                 |                |          |          |               |
|-----------------------------|---------------------------------|----------------|----------|----------|---------------|
| All Prompt Templates        |                                 |                |          |          |               |
| 6 items                     |                                 |                |          |          |               |
| Name                        | Description                     | Template Type  | Category | Status   | Date Modified |
| Summarize Messaging Session | Creates a rich-text summary ... | Work Summary   | Standard | ● Active |               |
| Summarize Voice Call        | Creates a rich-text summary ... | Record Summary | Standard | ● Active |               |
| Summarize Voice Call        | Creates a rich-text summary ... | Work Summary   | Standard | ● Active |               |
| Summarize Messaging Session | Creates a rich-text summary ... | Record Summary | Standard | ● Active |               |

Then, to create or customize the prompt template, follow the instructions in [Ingredients of a Prompt Template in Help](#).

SEE ALSO:

[Salesforce Help: Show AI-Generated Summaries with Einstein Work Summaries](#)

[Salesforce Help: Prompt Builder](#)

[Salesforce Help: Einstein Copilot](#)

[Einstein Features](#)

[New and Changed Standard Copilot Actions](#)

## Use Einstein Work Summaries in Additional Languages

Now generally available, Einstein Work Summaries for Messaging Sessions supports three more languages: Dutch, Portuguese (Brazilian), and Spanish (Mexico).

This change applies to all enhanced messaging channels and Messaging for In-App and Web in Unlimited editions with Einstein for Service or Einstein 1. Einstein generative AI is available in Lightning Experience.

To purchase the Einstein for Service add-on or Einstein 1, contact your Salesforce account executive.

**How:** For Messaging sessions, Einstein detects the conversation language and drafts summaries accordingly. If Einstein can't detect the language, summaries are drafted in the [user locale's language](#).

SEE ALSO:

[Einstein Features](#)

[Salesforce Help: Use Work Summaries in the Console](#)

## Service Intelligence

Check out new Service Intelligence features that help you reduce costs and improve customer service.

IN THIS SECTION:

[Get Your Service Intelligence Data Even Faster](#)

Update your service data more frequently with the new hourly app refresh schedule option.

### [Monitor Your Service Intelligence Installations and Upgrades](#)

When Service Intelligence is installed or upgraded, the process progress displays the elapsed time.

### [Access Your Service Intelligence Resources in One Place](#)

After installing Service Intelligence, you can explore all the app's Salesforce resources. These resources include analytics assets, like dashboards and components, intelligence assets like Einstein Studio models, data assets like datasets and data model objects, and transformations like batch data transforms.

### [Help Agents Predict Time to Resolve Cases](#)

Add the Time to Resolve insight component to your case page layouts so your agents can estimate and prioritize workloads. AI-powered insights evaluate how much time it might take to resolve cases so agents can better manage SLAs or reassign work to teammates. Time to Resolve is a machine learning model built using Einstein Studio No Code Builder.

### [View Contact Center Metrics on Enhanced Dashboards](#)

Spot key performance indicators (KPIs) on redesigned dashboards for cases, omni-channel, and conversation mining. New tabs for Channel Performance, Agent Performance, and Knowledge Performance help you find specific metrics faster. New Data Explorer sections let you analyze topics, such as case volume and routing effectiveness. Additions to case dashboards include the Contact Reason field and Costly Contact Reasons chart so you view more insights about your contact center.

### [Simplify Service Intelligence Permission Sets](#)

To streamline access to the CRM Analytics Platform, a new Service Intelligence App Admin permission set replaces the Service Intelligence Admin permission set. Unlimited Edition orgs already have the CRM Analytics Platform, so the new Service Intelligence permission set removes duplicate access.

### [Apply Additional Service Assets in Data Cloud](#)

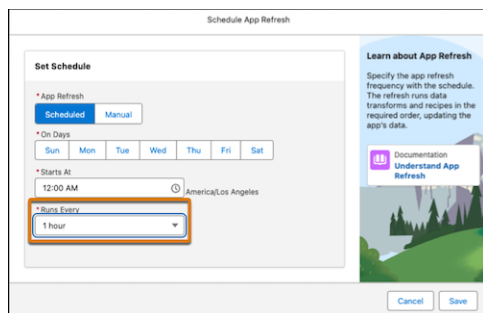
Bring more of your service data into Service Cloud with Service Data Kit version 4.0. This updated version includes a new Digital Engagement data bundle and new data mappings for the Knowledge and Field Service bundles, which provide easy installation of knowledge, field service, and digital engagement 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.

## Get Your Service Intelligence Data Even Faster

Update your service data more frequently with the new hourly app refresh schedule option.

**Where:** This change applies to Service Cloud in Lightning Experience in Enterprise and Unlimited editions for an additional cost.

**How:** In Service Intelligence setup, installed versions of Service Intelligence are listed. View details and update schedule app refreshes on the Settings tab.



SEE ALSO:

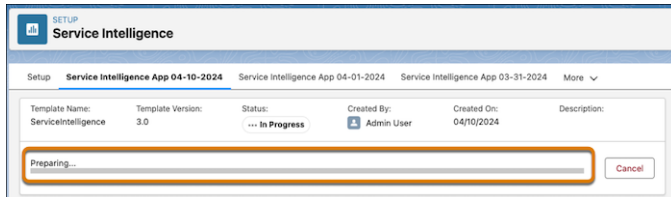
[Salesforce Help: Service Intelligence Setup \(can be outdated or unavailable during release preview\)](#)

## Monitor Your Service Intelligence Installations and Upgrades

When Service Intelligence is installed or upgraded, the process progress displays the elapsed time.

**Where:** This change applies to Service Cloud in Lightning Experience in Enterprise and Unlimited editions for an additional cost.

**How:** In Service Intelligence setup, installed versions of Service Intelligence are listed. View the installation progress on the app tab.



SEE ALSO:

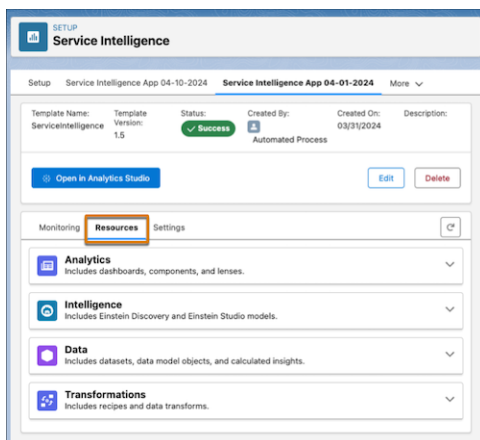
[Salesforce Help: Service Intelligence Setup \(can be outdated or unavailable during release preview\)](#)

## Access Your Service Intelligence Resources in One Place

After installing Service Intelligence, you can explore all the app's Salesforce resources. These resources include analytics assets, like dashboards and components, intelligence assets like Einstein Studio models, data assets like datasets and data model objects, and transformations like batch data transforms.

**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. Select a version and use the Resources tab to view all the assets. Click on an asset to open it in its respective tool.



SEE ALSO:

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

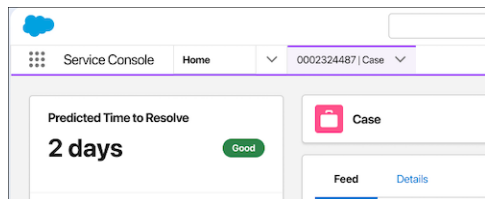
## Help Agents Predict Time to Resolve Cases

Add the Time to Resolve insight component to your case page layouts so your agents can estimate and prioritize workloads. AI-powered insights evaluate how much time it might take to resolve cases so agents can better manage SLAs or reassign work to teammates. Time to Resolve 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 App 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 \(can be outdated or unavailable during release preview\)](#)

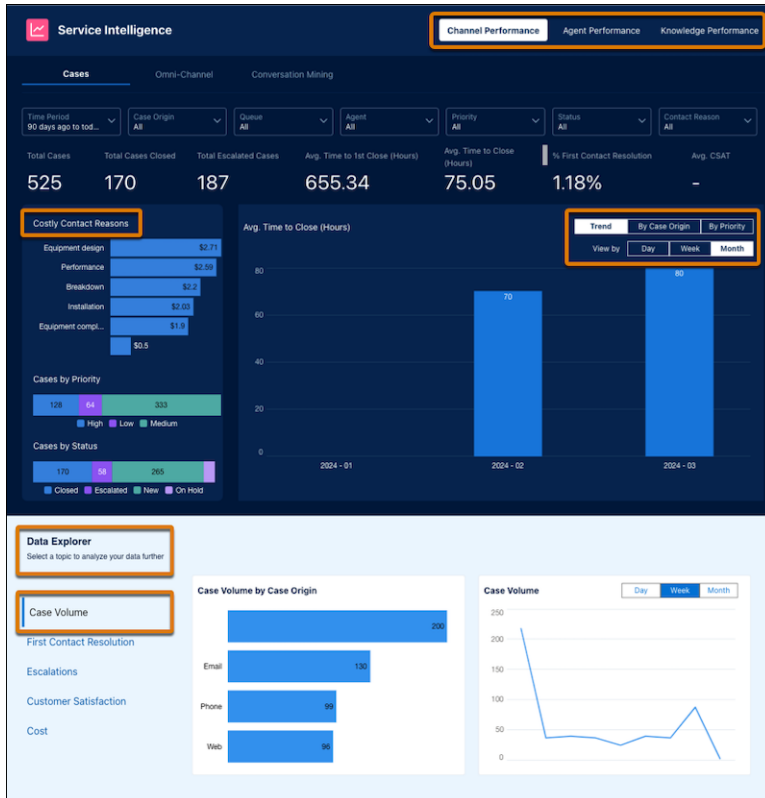
## View Contact Center Metrics on Enhanced Dashboards

Spot key performance indicators (KPIs) on redesigned dashboards for cases, omni-channel, and conversation mining. New tabs for Channel Performance, Agent Performance, and Knowledge Performance help you find specific metrics faster. New Data Explorer sections let you analyze topics, such as case volume and routing effectiveness. Additions to case dashboards include the Contact Reason field and Costly Contact Reasons chart so you view more insights about your contact center.

**Where:** This change applies to Service Cloud in Lightning Experience in Enterprise and Unlimited editions for an additional cost.

**How:** To see the redesigned dashboards, click either Cases, Omni-Channel, or Conversation Mining tabs.





SEE ALSO:

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

## Simplify Service Intelligence Permission Sets

To streamline access to the CRM Analytics Platform, a new Service Intelligence App Admin permission set replaces the Service Intelligence Admin permission set. Unlimited Edition orgs already have the CRM Analytics Platform, so the new Service Intelligence permission set removes duplicate access.

**Where:** This change applies to Service Cloud in Lightning Experience in Enterprise and Unlimited editions for an additional cost.

SEE ALSO:

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

[Salesforce Help: Service Intelligence Considerations and Requirements](#) (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 4.0. This updated version includes a new Digital Engagement data bundle and new data mappings for the Knowledge and Field Service bundles, which provide easy installation of knowledge, field service, and digital engagement 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, field service, and digital engagement 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: Install the Service Data Kit for Service Intelligence \(can be outdated or unavailable during release preview\)](#)

## Service Catalog

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

IN THIS SECTION:

[Run Catalog Items for Contacts in Service Console](#)

Use Service Console to execute catalog items outside of Service Catalog. Catalog items are now available in the Actions & Recommendations component, enabling service agents to run catalog items on behalf of customers who can't order those services themselves.

[Make Catalog Items Available On External Sites with Lightning Out](#)

Site admins can use a Lightning Out component to make catalog items available on external sites, which enable customers to order services from external sites without needing access to Service Catalog. Additionally, authenticated users can use external sites to confer their authentication to unauthenticated users, giving those unauthenticated users access to catalog items.

[Provide Guest User Access to Service Catalog](#)

Use a guest user profile in Service Catalog to control public user access to view and request items in your catalog without authentication. Previously, only authenticated users were supported in Service Catalog.

[Integrate Service Catalog with Knowledge](#)

Provide even more customer self-service efficiency with Knowledge in Service Catalog. Attaching knowledge articles to catalog items provides more information about the service than the catalog item description alone does. The additional information increases customer self-service efficiency, because customers use the article to solve their own contact reasons.

[Einstein for Service Catalog \(Beta\)](#)

Accelerate case deflections in Service Catalog with Einstein Copilot. Through its generative AI-powered conversational experience, Einstein Copilot takes action in Service Catalog to resolve customers contact reasons without having them navigate your catalog or requiring agent assistance.

## Run Catalog Items for Contacts in Service Console

Use Service Console to execute catalog items outside of Service Catalog. Catalog items are now available in the Actions & Recommendations component, enabling service agents to run catalog items on behalf of customers who can't order those services themselves.

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

**Who:** To run catalog items for contacts, you must have the Service Catalog Agent user profile and the Service Catalog Access permission set license.

**How:** Launch Service Console in the Lightning App Launcher, then select the contact ID of the user you are running the catalog item for. The Action & Recommendation component in Service Console lists available catalog items. A catalog request and a Case are generated after you run the catalog item for your contact.

SEE ALSO:

[Salesforce Help: Create an Actions & Recommendations Deployment \(can be outdated or unavailable during release preview\)](#)

## Make Catalog Items Available On External Sites with Lightning Out

Site admins can use a Lightning Out component to make catalog items available on external sites, which enable customers to order services from external sites without needing access to Service Catalog. Additionally, authenticated users can use external sites to confer their authentication to unauthenticated users, giving those unauthenticated users access to catalog items.

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

**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:** Add this component as a dependency to the Lightning Out app.

```
<html>
 <script src="SiteURL/lightning/lightning.out.js"></script>
 <body>
 <h1>Header</h1>
 <div id="item"></div>
 </body>
 <script>
 // What needs to be done: in your org, add this URL (probably localhost) to CORS
 var token = "<token, not prefixed by Bearer>"
 $Lightning.use("runtime_service_servicecatalog:serviceCatalogLightningOut", function()
 {
 $Lightning.createComponent("runtime_service_servicecatalog:catalogItem",
 { itemApiName: "<itemName>", targetCustomerId: "<CustomerId>" },
 "item",
 function(newCmp, status, errorMessage) {
 if (status === "SUCCESS") {
 console.log("Component Created Successfully");
 } else {
 console.log("Component not created | " + errorMessage);
 }
 }
)
 }, "SiteURL"
 , token);
```

```
</script>
</html>
```

**SEE ALSO:**

[Salesforce Lightning Web Components Developer Guide: Use Components Outside Salesforce with Lightning Out \(Beta\)](#)

[Salesforce Lightning Web Components Developer Guide: Share Lightning Out Apps with Unauthenticated Users](#)

## Provide Guest User Access to Service Catalog

Use a guest user profile in Service Catalog to control public user access to view and request items in your catalog without authentication. Previously, only authenticated users were supported in Service Catalog.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions with Service Cloud for Aura and LWR Experience Sites, Salesforce Sites, and sites built outside of Salesforce.

**Who:** To use this feature in Experience Sites, 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

To use this feature in Salesforce Sites or external sites, only the Service Catalog Access permission set license is required.

**How:** For Experience Cloud sites, head to the Experience Administration settings to enable the Guest User profiles, and then assign the associated permissions and licenses for the Service Catalog Guest User. For Salesforce and external sites, create a Visualforce page to expose catalog items externally and then create a Salesforce Site to allow guest users to access the items.

**SEE ALSO:**

[Salesforce Help: Set Up Service Catalog Guest Users \(can be outdated or unavailable during release preview\)](#)

## Integrate Service Catalog with Knowledge

Provide even more customer self-service efficiency with Knowledge in Service Catalog. Attaching knowledge articles to catalog items provides more information about the service than the catalog item description alone does. The additional information increases customer self-service efficiency, because customers use the article to solve their own contact reasons.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions with Service Cloud and the Customer Service Catalog add-on license.

**Who:** To use this feature, you must have the Service Catalog Builder permission set, Knowledge enabled, 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:** Create a custom component for your Experience Cloud site to link knowledge articles with your Service Catalog, and then add it to the Service Catalog Item Definition detail page.

SEE ALSO:

[LWR Sites for Experience Cloud Developer Guide: Create Components for LWR Sites](#)

[Lightning Aura Components Developer Guide: Creating Components](#)

[Lightning Web Components Developer Guide: Create Lightning Web Components](#)

[Lightning Web Components Developer Guide: Configure a Component for Experience Builder](#)

## Einstein for Service Catalog (Beta)

Accelerate case deflections in Service Catalog with Einstein Copilot. Through its generative AI-powered conversational experience, Einstein Copilot takes action in Service Catalog to resolve customers contact reasons without having them navigate your catalog or requiring agent assistance.



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

IN THIS SECTION:

### [Drive Case Resolution in Service Catalog with AI \(Beta\)](#)

With Einstein Copilot as your AI assistant, your customers resolve their questions without navigating the catalog or requiring agent assistance. Through a generative AI-powered conversational experience, Copilot uses an LLM to identify and execute relevant actions to resolve customer contact reasons. In Service Catalog, Copilot uses actions to open catalog item requests for customers or provides them with a URL link to the item in your catalog.

### [Share Catalog Item Links to Customers with Einstein Copilot \(Beta\)](#)

Use Einstein Copilot in Service Catalog to build custom actions that resolve customer contact reasons by sharing URL links to the items in your catalog. Through a generative AI-powered conversational experience, Copilot determines which of your catalog items resolve the contact reason and then provides the customer a URL link to the item in your catalog.

## Drive Case Resolution in Service Catalog with AI (Beta)

With Einstein Copilot as your AI assistant, your customers resolve their questions without navigating the catalog or requiring agent assistance. Through a generative AI-powered conversational experience, Copilot uses an LLM to identify and execute relevant actions to resolve customer contact reasons. In Service Catalog, Copilot uses actions to open catalog item requests for customers or provides them with a URL link to the item in your catalog.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions with Service Cloud, the Customer Service Catalog add-on, and the Einstein for Service add-on. Einstein generative AI is available in Lightning Experience.

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

**Who:** To use this feature, you must have the Service Catalog Builder perm set and Use Einstein Copilot for Salesforce User perm set.

**Why:** Without requiring you to build any custom functionality, Service Catalog provides three custom actions and sample catalog items for common support services: Update Phone Number, Update Email, and Get Help.

The catalog actions tell Copilot to resolve the contact reasons by opening a service catalog request for the item. The flow used in the catalog fulfillment of catalog items determines how Copilot resolves the contact reason. All sample items contain autolaunched flows in their fulfillments, which always result in a catalog item request output.

Copilot also resolves contact reasons by providing customers a URL link to the catalog item in your site that they can request. A URL output is associated only with items that contain orchestration or screen flows in their fulfillment.

**How:** From Setup, enable Einstein generative AI and turn on Einstein Copilot for Salesforce from the Einstein Copilots page. Then, from the Einstein Copilot actions guided setup, configure the provided Service Catalog actions and add the actions to your Copilot.

SEE ALSO:

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

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

[Salesforce Help: Integrating AI into Your Service Catalog Site \(can be outdated or unavailable during release preview\)](#)

## Share Catalog Item Links to Customers with Einstein Copilot (Beta)

Use Einstein Copilot in Service Catalog to build custom actions that resolve customer contact reasons by sharing URL links to the items in your catalog. Through a generative AI-powered conversational experience, Copilot determines which of your catalog items resolve the contact reason and then provides the customer a URL link to the item in you catalog.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions with Service Cloud, the Customer Service Catalog add-on, and the Einstein for Service add-on. Einstein generative AI is available in Lightning Experience.

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

**Who:** To use this feature, you must have the Service Catalog Builder perm set and Use Einstein Copilot for Salesforce User perm set.

**How:** You must build a custom Copilot action using the Service Catalog Item action type for any catalog item that contains orchestration or screen flows in their fulfillment.

First, from Setup, enable Einstein generative AI and turn on Einstein Copilot for Salesforce from the Einstein Copilots page. Then, from the Catalog Settings page in Setup, turn on Catalog Item Sharing.

Second, from the Einstein Copilot actions guided setup, create a custom action for your catalog items using the Service Catalog Item action type.

SEE ALSO:

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

[Salesforce Help: Extend Your Copilot with Custom Actions \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Integrating AI into Your Service Catalog Site \(can be outdated or unavailable during release preview\)](#)

## Channels

Learn about Summer '24 improvements to Email-to-Case, Messaging, and Service Cloud Voice.

**IN THIS SECTION:**[Email](#)

Get the gist of emails and email threads with Einstein Work Summaries for Email, use upgraded threading for automated emails, and enjoy improvements to the composer experience.

[Messaging](#)

In Summer '24, migrate enhanced WhatsApp channels to Unified Messaging, message customers in the Salesforce Mobile App, analyze messaging transcripts in Data Cloud, and scale up your customer service with improvements to messaging components.

[Voice](#)

Reduce customer wait time by actively managing your contact center queue backlog. Get midconversation summaries for Voice in five more languages. Protect sensitive data by masking customer phone numbers.

[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](#)

User verification works in Messaging for In-App and Web deployments that are added to Channel Menu, and the Search Individual flow action is generally available.

## Email

Get the gist of emails and email threads with Einstein Work Summaries for Email, use upgraded threading for automated emails, and enjoy improvements to the composer experience.

**IN THIS SECTION:**[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. This update was 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 was first available in Winter '21.

[Catch Up On Emails Quickly with Einstein Work Summaries for Email \(Generally Available\)](#)

Help agents quickly catch up on emails with concise summaries of individual emails or entire email threads.

[Enjoy Improved Threading for Emails Sent by Flows](#)

Now even automated emails support the new token-based threading. To securely link email replies to the correct record, place a threading token in the email's subject or body.

[Use Threading Tokens with More Objects](#)

Previously, threading tokens were restricted to Cases. Now they're a platform feature, and you can use them to thread responses to emails for any object that supports activity tracking.

[Threading Tokens Are Exempt From Salesforce Org Storage Policy](#)

Previously, email threading tokens counted towards an org's data storage limits. Now they're just a benefit included with the email channel.

### [Manage Visibility for Your Email Routing Address](#)

Now you can decide whether users need permission to use an email routing address to send emails. With this option, it's also easy to curate a list of addresses for different sets of users.

## 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. This update was 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 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.

**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

You asked for a cleaner visual experience, and we listened. We also removed the automatically displayed table controls, word and character counts, and the window about formatting pasted text.

**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. To revert to the previous editor, disable the release update.

SEE ALSO:

[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 was first available in Winter '21.

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

**When:** Salesforce enforces this update in Spring '25. If you're a Salesforce admin for a Salesforce org that still uses Ref ID, you will see a banner reminding you to transition to Lightning threading by the enforcement date.

**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.

[Learn more](#) about the best practices for enabling this release update.

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](#)

## Catch Up On Emails Quickly with Einstein Work Summaries for Email (Generally Available)

Help agents quickly catch up on emails with concise summaries of individual emails or entire email threads.

**Where:** This change applies to Unlimited and Enterprise editions, with Service Cloud Einstein add-on. Einstein for Service is available in Lightning Experience.

To purchase the Einstein for Service add-on, contact your Salesforce account executive.

**How:** In Setup, search for Einstein Generative AI and verify that it's on. Then, search for the Einstein Work Summaries and toggle it on. From the Email tab, map Einstein's responses to Email Summary fields. Finally, turn on Email Message Summaries.

Email

### Map Responses to Salesforce Fields

To generate and save email summaries, verify that Email-to-Case is enabled. Then, map each Einstein response to custom fields on the Email Message and Case objects, and turn on Email Message Summaries to long text area fields.

Email Message Summaries  Active

**Field Mapping** Edit

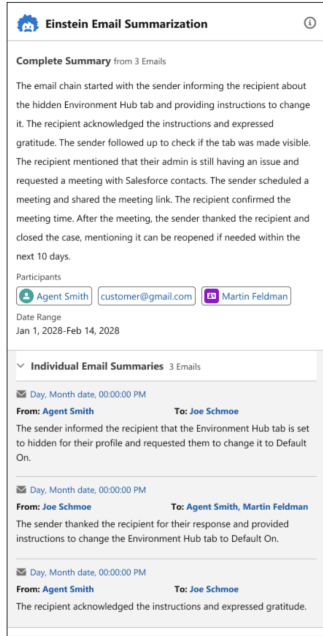
Einstein Responses	Target Fields
<p><b>Individual Email Summary</b> Summary of a single case email</p> <hr/> <p><b>Combined Summary</b> Summary of all emails associated with a particular case</p>	<p><b>Email Message Field Name</b> Email Summary</p> <hr/> <p><b>Case Field Name</b> Combined Email Summary</p>

**How does Einstein Work Summaries for Email work?**

Using natural language processing, Einstein identifies the most important information in an email thread. Einstein analyzes a conversation to identify key points and important details. The summary represents the overall context of the conversation.

[Tell Me More About Einstein Work Summaries for Email](#)

You can access both summaries of individual emails and a combined summary of the entire conversation from the Einstein Email Summaries component on a case record page. To get summaries for an email thread, click Get Summaries on the related case.



SEE ALSO:

[Salesforce Help: Use Work Summaries in the Console](#)

## Enjoy Improved Threading for Emails Sent by Flows

Now even automated emails support the new token-based threading. To securely link email replies to the correct record, place a threading token in the email's subject or body.

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

SEE ALSO:

[Use Threading Tokens in Emails](#)

## Use Threading Tokens with More Objects

Previously, threading tokens were restricted to Cases. Now they're a platform feature, and you can use them to thread responses to emails for any object that supports activity tracking.

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

**How:** To set up token-based threading for objects other than Case, create an Apex Email Service. Use the `EmailMessages.getRecordIdFromEmail` function to find the record that matches the token.

SEE ALSO:

[Email Services](#)

[Salesforce Developer Guide: getRecordIdFromEmail](#)

[Salesforce Developer Guide: getFormattedThreadingToken\(recordId\)](#)

## Threading Tokens Are Exempt From Salesforce Org Storage Policy

Previously, email threading tokens counted towards an org's data storage limits. Now they're just a benefit included with the email channel.

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

## Manage Visibility for Your Email Routing Address

Now you can decide whether users need permission to use an email routing address to send emails. With this option, it's also easy to curate a list of addresses for different sets of users.

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

**How:** Go to the Email-to-Case page under Setup. Choose a routing address to edit, or add a new routing address. Under Routing Information, select **Controlled by Permission Set**, and then save.

SEE ALSO:

[Salesforce Help: Add Routing Addresses for Email-to-Case Email Services](#)

## Messaging

In Summer '24, migrate enhanced WhatsApp channels to Unified Messaging, message customers in the Salesforce Mobile App, analyze messaging transcripts in Data Cloud, and scale up your customer service with improvements to messaging components.

IN THIS SECTION:

[Merge Marketing and Service by Migrating from Enhanced WhatsApp to Unified Messaging](#)

In Unified Messaging, service and marketing interactions occur in a single channel. Previously, you couldn't create unified WhatsApp channels with a number that was associated with a Service Cloud WhatsApp channel. When you migrate from an enhanced WhatsApp channel to a unified WhatsApp channel, your messaging history and channel settings are preserved. You also get access to Unified Messaging features such as Data Cloud reporting.

[Message Your Customers from the Salesforce Mobile App](#)

Modernize your customer service by letting agents message customers from the Salesforce mobile app. Previously, agents had to be signed in to Omni on the Salesforce agent console to engage in conversations.

[Say Goodbye to Standard WhatsApp Channels](#)

Take advantage of a range of productivity-boosting tools available only in Enhanced Messaging. 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.

[Upgrade SMS and Facebook Messenger Channels from Standard to Enhanced](#)

Upgrade your standard SMS or Facebook Messenger channels to enhanced channels to benefit from features such as messaging components and session transfers. As part of this change, we're phasing out the option to create standard SMS and Facebook Messenger channels.

[Analyze Conversation Transcripts in Data Cloud](#)

To review and analyze conversation data, use Data Cloud to access conversation transcripts from enhanced messaging channels, voice calls, and Unified Messaging. Analyze transcripts in Data Cloud with reports and dashboards, zoom in to your data with Data Cloud API, and search for specific information by using Salesforce Object Query Language (SOQL) queries.

### [Block Sensitive Data in Enhanced Messaging, Messaging for In-App and Web, and Voice Transcripts](#)

Set up rules that hide particular data patterns in enhanced messaging sessions, Messaging for In-App and Web sessions, and Voice transcripts. For example, hide credit card numbers or profanity. You can remove the sensitive text or replace it with custom text, such as "(credit card number)". Previously, sensitive data rules were available only in standard Messaging channels.

### [Use Status-Based Capacity with Messaging \(Beta\)](#)

Measure agent capacity more accurately with status-based capacity for enhanced Messaging channels and Messaging for In-App and Web. When a status-based capacity model is used, a messaging agent's capacity is based on the status of their accepted work rather than on the number of open tabs and sessions. Previously, Messaging worked only with a tab-based capacity model.

### [Register SMS Long Codes in Setup](#)

When setting up an SMS channel, you can now register 10-digit long code numbers and toll-free long code numbers on the new Regulatory Compliance page in Setup. Previously, a web form was used to register numbers, and you couldn't see your registration status.

### [Create a Custom UI Solution for Messaging for In-App and Web \(Beta\)](#)

If you're keen to design a highly customized UI for your mobile app or web messaging experience—and flex your developer muscles while you're at it—try the new custom client deployment type.

### [Messaging Components](#)

In Summer '24, translate messaging components into your customer's language, use auto-response components in Partner Messaging, and take advantage of improvements to secure forms, authentication components, and the List Selector format.

### [Agent Messaging Experience](#)

Summer '24 features several key improvements to the way agents message with customers in the Service Console. It's now easier to attach files, refresh a conversation after experiencing connection issues, and view mid-conversation summaries. Admins can adjust the Enhanced Conversation component height and customize the list of session transfer recipients.

### [Track Who Ends Enhanced Messaging Sessions](#)

A new field on enhanced messaging sessions shows whether a session was ended by the customer, the agent, a bot, or automation. Add the Ended By Type (EndedByType) field to your custom report types to get insight into enhanced messaging activity.

### [Activate or Deactivate Sensitive Data Rules from the Rules List View](#)

Previously, you had to edit a rule and select or deselect the Active checkbox.

### [Einstein Conversation Mining is Now Available in Messaging for In-App and Web](#)

Track key trends and top contact reasons with Einstein Conversation Mining. This reporting tool is now available to Messaging for In-App and Web users.

### [Access to Sensitive Data Rules is Restricted to Admins](#)

To prevent users from unintentionally modifying sensitive data rules, only Salesforce admins are allowed to create, edit, activate, deactivate, and delete these rules. Users who aren't admins can only view sensitive data rules.

### [Route Data to Objects in Partner Messaging \(Beta\)](#)

You can use parameters, parameter mappings, and flow variables to send partner messaging conversation data to objects. This data gives agents more context for who they're messaging with. For example, create a Support Reason dropdown menu, and then route the customer's input to the Messaging Session object.

### [Set a More Informative Channel Type in Partner Messaging \(Beta\)](#)

Partners can now write their own Channel Type field value when creating an AppExchange package for Partner Messaging. Supervisors can report on Channel Type. Previously, all Partner Messaging channels had one Channel Type of Custom, making it difficult to differentiate them.

### [Customize the Partner Messaging Channel Setup Experience Using Icons \(Beta\)](#)

To help Salesforce admins select the right channel type when they set up Partner Messaging, use custom icons to uniquely identify each channel integration. Messaging partners upload the custom icon, such as a channel logo, and bundle it with the managed package. After the admin installs the package, the icon appears when they add the Messaging channel.

### [The Minimize Chat Window Button Is Relocated in Messaging for Web](#)

To align with accessibility standards, the minimize chat window button appears in the messaging for web conversation window's header when it's expanded in a desktop site. Previously, the button appeared below the expanded conversation window.

### [Messaging for Web Development](#)

Check out the new code snippet settings to reduce noise during a session, restrict conversation history, control whether a new tab loads the web chat client minimized, and more.

### [Send Automated Notifications in Partner Messaging Channels \(Beta\)](#)

Automate customer updates with messaging components and the Send Conversation Messages action. Previously, you could send automated notifications only in standard and enhanced Messaging channels.

### [Bring Your Own Channel for Messaging \(Generally Available\)](#)


Connect your preferred messaging service to Salesforce with Bring Your Own Channel. Use the features you love from your external messaging service while maintaining a consistent agent and supervisor experience within Salesforce. This feature, which is now generally available, was previously called Partner Messaging.

## Merge Marketing and Service by Migrating from Enhanced WhatsApp to Unified Messaging

In Unified Messaging, service and marketing interactions occur in a single channel. Previously, you couldn't create unified WhatsApp channels with a number that was associated with a Service Cloud WhatsApp channel. When you migrate from an enhanced WhatsApp channel to a unified WhatsApp channel, your messaging history and channel settings are preserved. You also get access to Unified Messaging features such as Data Cloud reporting.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited Editions with the Marketing Cloud Engagement and Service Cloud Digital Engagement add-ons.

**How:** To migrate an enhanced WhatsApp channel, contact your account executive to purchase Unified Messaging. Then, go to the Your Numbers page in Setup under WhatsApp. Click **Add Number** and follow the prompts to add the number that was previously in use in Service Cloud Digital Engagement. You can also follow these steps to migrate a WhatsApp number from an external business service provider.

 **Note:** When you bring a WhatsApp number from a Service Cloud channel to a unified channel, it's a one-way move. You can't move the number back to its original channel in the future. It's also not possible to migrate from a standard WhatsApp channel to a unified channel; migrate first from standard to enhanced WhatsApp, and then to a unified channel.

SEE ALSO:

[Salesforce Help: WhatsApp Unified Messaging Channel Capabilities \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Migrate to Unified WhatsApp \(can be outdated or unavailable during release preview\)](#)

## Message Your Customers from the Salesforce Mobile App

Modernize your customer service by letting agents message customers from the Salesforce mobile app. Previously, agents had to be signed in to Omni on the Salesforce agent console to engage in conversations.

**Where:** This change applies to all enhanced messaging channels and Messaging for In-App and Web. [View required editions.](#)

SEE ALSO:

[Message Customers in the Salesforce Mobile App \(Beta\)](#)

[Message Customers in the Salesforce Mobile App \(Beta\)](#)

## Say Goodbye to Standard WhatsApp Channels

Take advantage of a range of productivity-boosting tools available only in Enhanced Messaging. 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:** To upgrade to an enhanced WhatsApp channel, you'll 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 \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Create or Upgrade to an Enhanced WhatsApp Channel \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Enhanced WhatsApp Messaging Channel Activation Checklist \(can be outdated or unavailable during release preview\)](#)

## Upgrade SMS and Facebook Messenger Channels from Standard to Enhanced

Upgrade your standard SMS or Facebook Messenger channels to enhanced channels to benefit from features such as messaging components and session transfers. As part of this change, we're phasing out the option to create standard SMS and Facebook Messenger channels.

**Where:** This change applies to standard and enhanced SMS and Facebook Messenger channels. [View required editions.](#)

**Why:** Here's what's changing in Summer '24.

- If you have active standard Messaging channels of any type, you can still create standard SMS or Facebook Messenger channels. However, we encourage you to create enhanced channels.
- If you don't have active standard Messaging channels, you no longer see the option to create standard channels of any type.
- If you have a standard SMS or Facebook Messenger channel, you can now upgrade it to an enhanced channel. You must make a few changes as part of the upgrade, such as updating your routing settings, but your channel data and preferences are preserved.

**How:** To upgrade a standard SMS or Facebook Messenger channel, go to the Messaging Settings page in Setup. Find your channel in the list, click the down arrow to open its action menu, and select **Upgrade to Enhanced**. Review the list of upgrade tasks and verify that you've completed them, and then click **Upgrade**.

SEE ALSO:

[Salesforce Help: Upgrading from Standard to Enhanced Messaging \(can be outdated or unavailable during release preview\)](#)

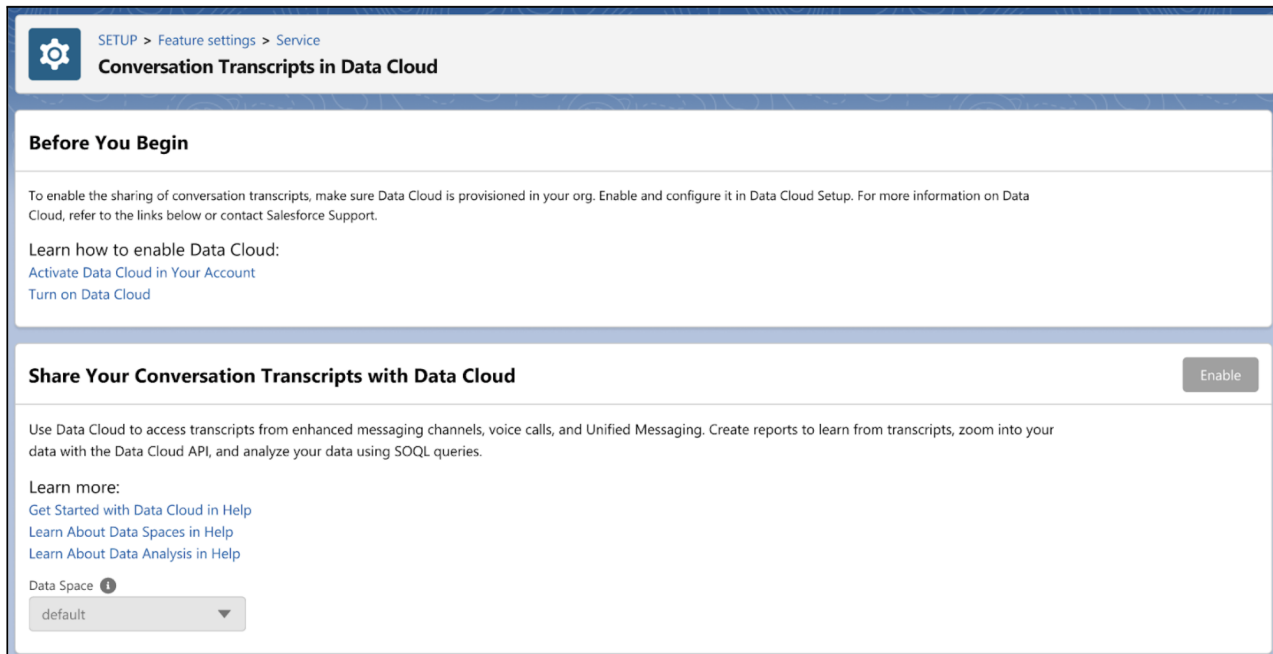
## Analyze Conversation Transcripts in Data Cloud

To review and analyze conversation data, use Data Cloud to access conversation transcripts from enhanced messaging channels, voice calls, and Unified Messaging. Analyze transcripts in Data Cloud with reports and dashboards, zoom in to your data with Data Cloud API, and search for specific information by using Salesforce Object Query Language (SOQL) queries.

 **Note:** This feature is available only in production.

**Where:** This change applies to Enterprise and Unlimited editions that use Enhanced Messaging, Voice, or Unified Messaging. [View required editions.](#)

**How:** To enable access to conversation transcripts in Data Cloud, first verify that Data Cloud is provisioned in your org, and enable and configure it in Data Cloud Setup. Then, from Setup, go to **Conversation Transcripts in Data Cloud**. The data space to house your conversation transcripts is set to the default data space and you can't change it. Click **Enable**. You can't undo this action.



The screenshot shows the Salesforce Setup page for "Conversation Transcripts in Data Cloud". The breadcrumb trail is "SETUP > Feature settings > Service". The page title is "Conversation Transcripts in Data Cloud".

**Before You Begin**

To enable the sharing of conversation transcripts, make sure Data Cloud is provisioned in your org. Enable and configure it in Data Cloud Setup. For more information on Data Cloud, refer to the links below or contact Salesforce Support.

Learn how to enable Data Cloud:

- [Activate Data Cloud in Your Account](#)
- [Turn on Data Cloud](#)

**Share Your Conversation Transcripts with Data Cloud** Enable

Use Data Cloud to access transcripts from enhanced messaging channels, voice calls, and Unified Messaging. Create reports to learn from transcripts, zoom into your data with the Data Cloud API, and analyze your data using SOQL queries.

Learn more:

- [Get Started with Data Cloud in Help](#)
- [Learn About Data Spaces in Help](#)
- [Learn About Data Analysis in Help](#)

Data Space ⓘ

default ▼

After you enable access to conversation transcripts in Data Cloud, all users with access to the default data space can view and analyze the transcripts from enhanced messaging channels, voice calls, and Unified Messaging.

SEE ALSO:

[Salesforce Help: Analyze Conversation Transcript Data in Data Cloud](#)

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

Set up rules that hide particular data patterns in enhanced messaging sessions, Messaging for In-App and Web sessions, and Voice transcripts. For example, hide credit card numbers or profanity. You can remove the sensitive text or replace it with custom text, such as "(credit card number)". Previously, sensitive data rules were available only in standard Messaging channels.

**Where:** This change applies to enhanced Messaging channels, Messaging for In-App and Web, and Voice. [View required editions.](#)

**How:** To create a sensitive data rule, in Setup, go to the Sensitive Data Rules for Enhanced Channels page. Click **New Rule**, provide the text patterns that you want to hide, and define your rule's scope and behavior. When you're ready to start enforcing your active rules, turn on the Sensitive Data Rules setting at the top of the page.

SEE ALSO:

[Salesforce Help: Block Sensitive Data in Messaging Sessions and Voice Call Transcripts \(can be outdated or unavailable during release preview\)](#)

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

Measure agent capacity more accurately with status-based capacity for enhanced Messaging channels and Messaging for In-App and Web. When a status-based capacity model is used, a messaging agent's capacity is based on the status of their accepted work rather than on the number of open tabs and sessions. Previously, Messaging worked only with a tab-based capacity model.

**Where:** This change applies to enhanced Messaging channels and Messaging for In-App and Web. [View required editions.](#)

**Why:** Here's how using status-based capacity instead of tab-based capacity changes the messaging agent experience.

- Closing the tab of an active messaging session doesn't change the session's status or ownership, and the agent isn't prompted to end or inactivate the session. If the agent goes offline, all their active sessions remain active.
- If a session is inactive and the customer sends a new message, the agent who was handling it receives the message and continues helping the customer. In contrast, with tab-based capacity, the session is routed to the support team as if it were a new session. In that case, complex routing logic is required to ensure that the same agent receives it.
- In standard (not console) apps, agents have more freedom to simultaneously view multiple messaging session records without session ownership being affected.
- With status-based capacity, an agent can be assigned a total of 100 work items at a time, versus having up to 100 tabs open with tab-based capacity.

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

**How:** On the Omni-Channel Settings page in Setup, make sure that enhanced routing is enabled and then select **Enable Status-Based Capacity Model**. Then, on the Service Channels page in Setup, edit your messaging service channel and update the fields in the Capacity Settings section.

SEE ALSO:

[Salesforce Help: Set Up Routing for Messaging Channels in Service Cloud \(can be outdated or unavailable during release preview\)](#)

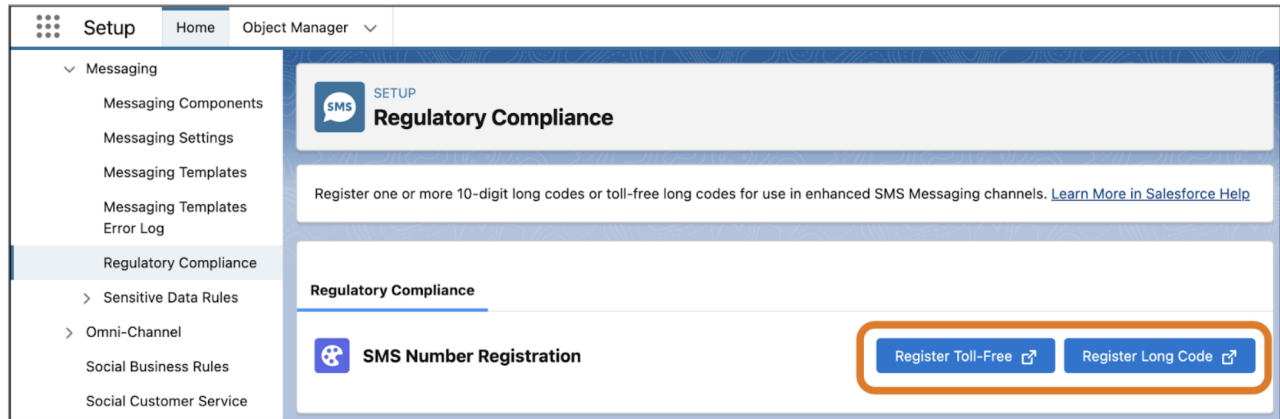
## Register SMS Long Codes in Setup

When setting up an SMS channel, you can now register 10-digit long code numbers and toll-free long code numbers on the new Regulatory Compliance page in Setup. Previously, a web form was used to register numbers, and you couldn't see your registration status.

**Where:** This change applies to standard and enhanced SMS channels. [View required editions.](#)

**How:** Follow the instructions to open a case requesting your new SMS channel. When your case is closed, it's time to register your number or numbers. In Setup, go to the Regulatory Compliance page under Messaging. Click **Register Long Code** to register a US or Canadian 10-digit long code number, or click **Register Toll-Free** to register a toll-free long code number.





The registration timeline isn't affected by this change. Registering a new phone number in the US and Canada can take 1 to 2 weeks for toll-free numbers and 1 to 4 weeks for 10-digit long codes.

SEE ALSO:

[Salesforce Help: Create SMS Long Code Channels in Service Cloud \(can be outdated or unavailable during release preview\)](#)

## Create a Custom UI Solution for Messaging for In-App and Web (Beta)

If you're keen to design a highly customized UI for your mobile app or web messaging experience—and flex your developer muscles while you're at it—try the new custom client deployment type.

**Where:** This change applies to Messaging for Web in a desktop site. [View required editions.](#)

**When:** Create custom client deployments in Messaging for In-App and Web starting on May 20, 2024.

**Why:** While our web or mobile deployments rely on our web client and mobile SDK, a custom client deployment lets you deliver a highly customized UI with the Messaging for In-App and Web REST API. This REST API can be used to create conversations that house messaging sessions, generate access tokens, and send messages and files. You can also integrate an external bot solution or partner-supported messaging solutions.

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

**How:** Create custom client deployments on the Embedded Service Deployments page. Then, reference your deployment name when invoking public endpoints from the new Messaging for In-App and Web REST API.

SEE ALSO:

[Salesforce Help: Configure a Custom Client Deployment for Messaging for In-App and Web](#)

[Developer Guide: Messaging for In-App and Web REST API](#)

## Messaging Components

In Summer '24, translate messaging components into your customer's language, use auto-response components in Partner Messaging, and take advantage of improvements to secure forms, authentication components, and the List Selector format.

## IN THIS SECTION:

### [Send Messaging Components in Your Customer's Language](#)

Show any messaging component in your customer's language with the help of Translation Workbench. For example, when you send a French-speaking customer a question with options, show the question and options in French.

### [Customize Secure Forms with New Settings](#)

When agents or bots send secure forms in messaging sessions, new settings help you customize every step of the form submission experience in Apple Messages for Business. Show a welcome screen before the form questions, and provide a title and subtitle for each form field. And, include a custom image and text in the form link that are both updated after the customer submits their responses.

### [Customize Lists in Messaging Components with New Settings](#)

To control the way messaging components with clickable options appear in messaging sessions, try several new settings on the List Selector format. Two types of messaging components use this format: time selectors and questions with options.

### [Control When Secure Forms Expire in Messaging Sessions](#)

When a form messaging component is sent in a messaging session, your customer has 5 minutes by default to submit their responses before the link expires. You can now customize this limit for each form. For example, change it to 60 minutes to accommodate customers in Messaging for In-App and Web.

### [Form Format in Secure Forms Is Generally Available in Messaging for In-App and Web](#)

Previously in Form messaging components, the Text format was generally available but the Form format was in beta for Messaging for In-App and Web. The Form format was already generally available for enhanced Apple Messages for Business channels.

### [Extend Messaging Components with Custom Constants](#)

To control the appearance of messaging components at a more granular level, add custom image or text constants to any messaging component. Previously, standard constants were auto-added when you created some types of messaging components, but you couldn't add your own.

### [Authentication Messaging Components Improved for Compatibility](#)

To remain compatible with Apple Messages for Business REST API, we've made a few changes to the way you set up authentication messaging components. Agents use these components to verify a customer's identity during an enhanced Apple Messages for Business messaging session.

### [Auto-Response Components Are Available in Partner Messaging \(Beta\)](#)

Previously only available to Messaging for In-App and Web customers, auto-response components are now available in Partner Messaging. Save agents time by automating common messages to customers at the beginning of a messaging session, when an agent joins, when the session ends, or when the session becomes inactive.

### [Prevent Unwanted Parameters in Your Auto-Response URL](#)

You asked, we listened. In order for a parameter to appear in your Messaging for Web auto-response URL, you must add one or more placeholders to your URL and configure a corresponding Web Page Parameter in the Messaging Component. Previously, all web page parameters were automatically appended to your URL without requiring specific configuration in the Messaging Component Builder.

## Send Messaging Components in Your Customer's Language

Show any messaging component in your customer's language with the help of Translation Workbench. For example, when you send a French-speaking customer a question with options, show the question and options in French.

**Where:** This change applies to enhanced Messaging channels and Messaging for In-App and Web. [View required editions.](#)

**How:** Two parts of a messaging component can be translated: the component name, which agents see, and constant values in the component itself, which customers see. Prepare your messaging components for translation and upload your translations in Translation Workbench. Next, give agents access to the new Messaging User Language field on the Messaging Session object.

At the start of a messaging session, the agent updates the Messaging User Language field on the session to list the customer's preferred language. When they send a messaging component during the session, the component appears in the customer's language if a translated version is available. Agents also see the messaging component names in their own preferred language, like any other text in the Service Console.

SEE ALSO:

[Salesforce Help: Translate Messaging Components into Your Customer's Language \(can be outdated or unavailable during release preview\)](#)

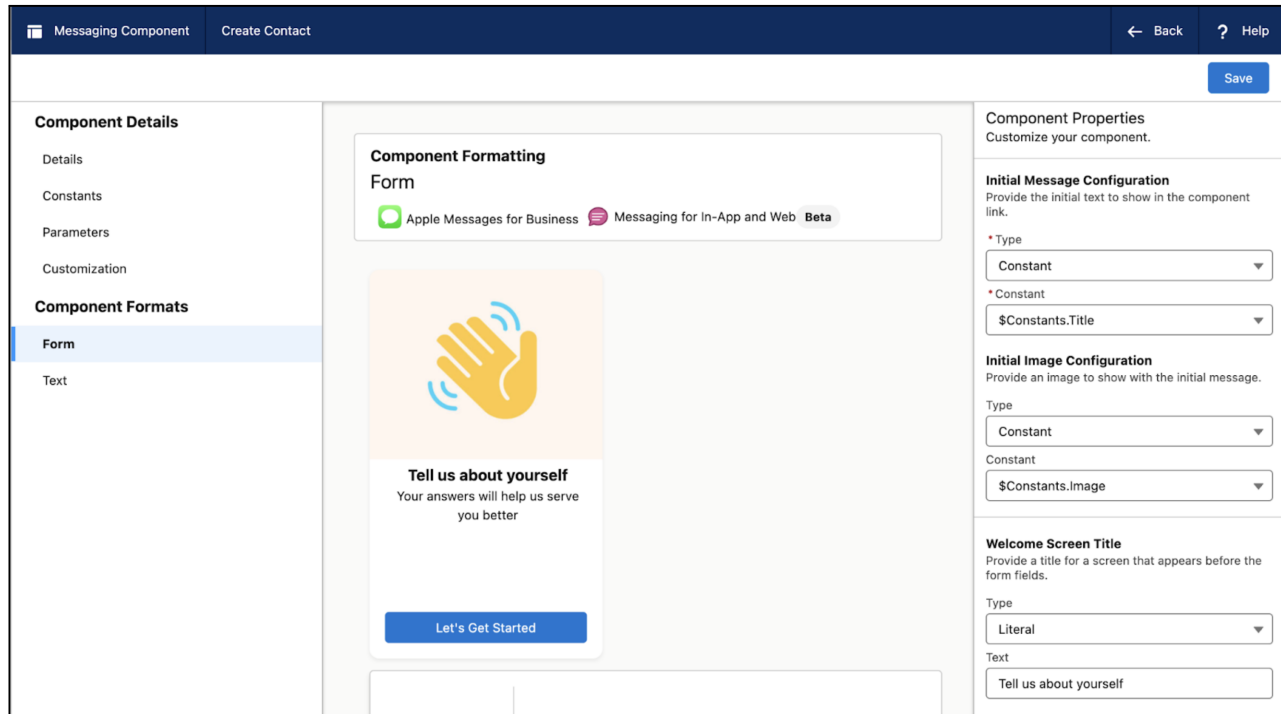
## Customize Secure Forms with New Settings

When agents or bots send secure forms in messaging sessions, new settings help you customize every step of the form submission experience in Apple Messages for Business. Show a welcome screen before the form questions, and provide a title and subtitle for each form field. And, include a custom image and text in the form link that are both updated after the customer submits their responses.

**Where:** This change applies to enhanced Apple Messages for Business channels. [View required editions.](#)

**How:** On the Messaging Components page in Setup, create a form messaging component. When the Messaging Component Builder opens, add the Form format to your component. Then, click the format name and customize the new properties in the properties pane.

- To add a welcome screen that appears when the customer clicks the component link, update the properties whose names start with Welcome Screen.
- To provide a title and subtitle for each form field, click a field in the form preview and update these properties: Field Title Configuration, Field Subtitle Configuration.
- To provide the text and image shown in the component link when the agent or bot first sends it to a customer, update these properties: Initial Message Configuration, Initial Image Configuration.
- To show different text and an image when the customer submits their responses, update these properties: Confirmation Message Configuration, Confirmation Image Configuration.



## SEE ALSO:

[Salesforce Help: Create and Send Secure Forms in Messaging Sessions \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Get to Know the Messaging Component Builder \(can be outdated or unavailable during release preview\)](#)

## Customize Lists in Messaging Components with New Settings

To control the way messaging components with clickable options appear in messaging sessions, try several new settings on the List Selector format. Two types of messaging components use this format: time selectors and questions with options.

**Where:** This change applies to enhanced WhatsApp and enhanced Apple Messages for Business channels. [View required editions.](#)

**How:** On the Messaging Components page in Setup, create a question with options or time selector messaging component. When the Messaging Component Builder opens, add the List Selector format to your component. Then, click the format name and customize the new properties in the properties pane.

- To provide the text and image shown in the component link when the agent or bot first sends it to a customer, update these properties: Initial Message Configuration, Initial Image Configuration.
- To show different text and an image after the customer selects an option, update these properties: Confirmation Message Configuration, Confirmation Image Configuration.

## SEE ALSO:

[Salesforce Help: Messaging Component Types and Formats \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Get to Know the Messaging Component Builder \(can be outdated or unavailable during release preview\)](#)

## Control When Secure Forms Expire in Messaging Sessions

When a form messaging component is sent in a messaging session, your customer has 5 minutes by default to submit their responses before the link expires. You can now customize this limit for each form. For example, change it to 60 minutes to accommodate customers in Messaging for In-App and Web.

**Where:** This change applies to enhanced Messaging channels and Messaging for In-App and Web. [View required editions.](#)

**How:** On the Messaging Components page in Setup, click a form name to open the Messaging Component Builder. Click the **Customization** tab on the left, enter your expiration limit for the form, and click **Save**.

The screenshot shows the Messaging Component Builder interface for a component named 'CreateCase'. The left sidebar has tabs for 'Component Details', 'Component Formats', and 'Customization'. The 'Customization' tab is selected. The main content area is titled 'Component Details Customization' and contains a text box explaining that links to the form expire in messaging sessions. Below this, there are two input fields: 'Global Action Name' with the value 'NewCase' and 'Time to Expiration (Minutes)' with the value '5'. The 'Time to Expiration (Minutes)' field is highlighted with an orange border.

After a form link expires, the customer can't submit their responses. However, agents or automation can send them the form again.

SEE ALSO:

[Salesforce Help: Create and Send Secure Forms in Messaging Sessions \(can be outdated or unavailable during release preview\)](#)

## Form Format in Secure Forms Is Generally Available in Messaging for In-App and Web

Previously in Form messaging components, the Text format was generally available but the Form format was in beta for Messaging for In-App and Web. The Form format was already generally available for enhanced Apple Messages for Business channels.

**Where:** This change applies to Messaging for In-App and Web. [View required editions.](#)

SEE ALSO:

[Salesforce Help: Create and Send Secure Forms in Messaging Sessions \(can be outdated or unavailable during release preview\)](#)

## Extend Messaging Components with Custom Constants

To control the appearance of messaging components at a more granular level, add custom image or text constants to any messaging component. Previously, standard constants were auto-added when you created some types of messaging components, but you couldn't add your own.

**Where:** This change applies to enhanced Messaging sessions and Messaging for In-App and Web. [View required editions.](#)

**Why:** Here are two examples of ways to use custom constants.

- **Customize the image shown in a component link:** Add two custom constants to a form messaging component: one showing a form, and one showing a checkmark. Then, click the Form format and select the first constant as your Initial Image, and the second

constant as your Confirmation Image. When an agent sends the form to a customer, the form link initially shows the form image, and then updates to show the checkmark image when the customer submits their responses.

- **Update messaging components that you plan to translate:** Because only constants are translated, replace any properties that use literal values with a custom constant. This way, the text can be translated.

**How:** Open a messaging component on the Messaging Components page in Setup. Then, click the Constants tab to manage your standard and custom constants. After you create a component, edit it to upload an image or add text.

SEE ALSO:

[Salesforce Help: Get to Know the Messaging Component Builder \(can be outdated or unavailable during release preview\)](#)

## Authentication Messaging Components Improved for Compatibility

To remain compatible with Apple Messages for Business REST API, we've made a few changes to the way you set up authentication messaging components. Agents use these components to verify a customer's identity during an enhanced Apple Messages for Business messaging session.

**Where:** This change applies to enhanced Apple Messages for Business channels. [View required editions.](#)

**How:** If you have an authentication messaging component, make these updates to keep it working as expected.

- In the Messaging Component Builder, open your authentication component and copy the Callback URL from the Details tab. Then, in the settings of your external identity provider, go to your authentication app and add the Callback URL to the list of redirect URLs.
- Copy the Token URL from your authentication app. Then, on the Auth. Providers page in Setup, paste it into the Token Endpoint URL field on your authentication provider.
- Complete these additional steps if you're using a custom authentication provider.
  - If your authentication provider Apex class makes any HTTP callouts to fetch information, add each HTTP base URL as a corresponding remote site on the Remote Site Settings page in Setup.
  - If your authentication provider requires a redirect URL in the token URL callout, edit the handleCallback function in the AuthProviderPluginClass to use the redirectUrl in the AuthProviderCallbackState.

SEE ALSO:

[Salesforce Help: Create and Send Authentication Requests in Messaging Sessions \(can be outdated or unavailable during release preview\)](#)

[Salesforce Developer Guide: AuthRequestHandler Interface](#)

[Salesforce Developer Guide: AuthProviderPluginClass](#)

## Auto-Response Components Are Available in Partner Messaging (Beta)

Previously only available to Messaging for In-App and Web customers, auto-response components are now available in Partner Messaging. Save agents time by automating common messages to customers at the beginning of a messaging session, when an agent joins, when the session ends, or when the session becomes inactive.

**Where:** This change applies to Partner Messaging. [View required editions.](#)

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

**How:** Create an Auto-Response messaging component in the component builder. Then add it to the Conversation Acknowledgement, Start Conversation, End Conversation, or Inactivate Conversation boxes in the setup page for your Partner Messaging channel.

SEE ALSO:

[Salesforce Help: Create and Send Auto-Response Components in Messaging Sessions \(can be outdated or unavailable during release preview\)](#)

## Prevent Unwanted Parameters in Your Auto-Response URL

You asked, we listened. In order for a parameter to appear in your Messaging for Web auto-response URL, you must add one or more placeholders to your URL and configure a corresponding Web Page Parameter in the Messaging Component. Previously, all web page parameters were automatically appended to your URL without requiring specific configuration in the Messaging Component Builder.

**Where:** This change applies to Messaging for Web. [View required editions.](#)

**How:** Add one or more placeholders to your URL configuration. For each placeholder, create a corresponding Web Page Parameter. To insert end user values from the client into the placeholder, continue to use Auto-Response API. If you have an existing Auto-Response component with a URL that used parameters, we recommend updating your configuration in the Messaging Component builder.

SEE ALSO:

[Personalize the URL for your Auto-Response Component](#)

## Agent Messaging Experience

Summer '24 features several key improvements to the way agents message with customers in the Service Console. It's now easier to attach files, refresh a conversation after experiencing connection issues, and view mid-conversation summaries. Admins can adjust the Enhanced Conversation component height and customize the list of session transfer recipients.

IN THIS SECTION:

[Assign a New User Permission to Partner Messaging Agents \(Beta\)](#)

To let Partner Messaging agents accept incoming and transferred messages and send outbound messages, assign the Message Customers with Partner Messaging user permission.

[The Attach File Action in the Enhanced Conversation Component Got a Makeover](#)

Agents now have more options when they send files in enhanced Messaging sessions and Messaging for In-App and Web.

[Enjoy a Better Messaging Experience Outside the Service Window](#)

When viewing an enhanced WhatsApp or Facebook Messenger session outside the service window, agents now see a message that too much time has passed to reply. They also can't enter text. Previously, agents received an error if they tried to send a message outside of the service window.

[Refresh Conversations After a Lost Connection](#)

Agents can refresh the Enhanced Conversation component with a new option in the End Chat dropdown menu. This option helps agents reestablish a lost network connection.

[Get Midconversation Summaries in Five New Languages](#)

Conversation Catch-Up is now available in six languages: English, French, German, Spanish, Italian, and Japanese. Previously, it was available only in English.

[Customize Which Queues, Flows, and Profiles Your Agents Can Transfer To](#)

Reduce long transfer destination lists when agents just need to deliver a session to the right place quickly. Choose whether to offer all queues, flows, and profiles, or just offer some.


### [Adjust the Enhanced Conversation Component's Height in the Agent Console](#)

You asked, we listened. Whether you find the Enhanced Conversation component to be too tall or too compact, we now give you control over its height.

### Assign a New User Permission to Partner Messaging Agents (Beta)

To let Partner Messaging agents accept incoming and transferred messages and send outbound messages, assign the Message Customers with Partner Messaging user permission.

**Where:** This change applies to Partner Messaging. [View required 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:** Add Message Customers with Partner Messaging to a custom permission set license, and assign it to agents.

SEE ALSO:

[Salesforce Help: Prepare Your Agents to Use Partner Messaging \(can be outdated or unavailable during release preview\)](#)

### The Attach File Action in the Enhanced Conversation Component Got a Makeover

Agents now have more options when they send files in enhanced Messaging sessions and Messaging for In-App and Web.

**Where:** This change applies to all messaging channels. [View required editions.](#)

**Why:** Previously, only Salesforce files with a public link were available to send. Now, all Salesforce files that you have access to show up when you select Send File.

Previously, you couldn't set an expiration date on a public link, or preview a file before sending it. Now you can.

**How:** Select the Send File action from the agent's Enhanced Conversation Component toolbar.

SEE ALSO:

[Salesforce Help: Send Images and Files in Messaging Sessions \(can be outdated or unavailable during release preview\)](#)

### Enjoy a Better Messaging Experience Outside the Service Window

When viewing an enhanced WhatsApp or Facebook Messenger session outside the service window, agents now see a message that too much time has passed to reply. They also can't enter text. Previously, agents received an error if they tried to send a message outside of the service window.

**Where:** This change applies to enhanced WhatsApp and enhanced Facebook Messenger channels. [View required editions.](#)

**How:** Currently, the Facebook Messenger service window is 7 days after the customer's last message, while the WhatsApp service window is 24 hours after the customer's last message. Outside of this window, agents can still raise a flag or transfer, end, or inactivate the session. In enhanced WhatsApp sessions, they can also send notification messaging components that are linked to approved WhatsApp message templates.

### Refresh Conversations After a Lost Connection

Agents can refresh the Enhanced Conversation component with a new option in the End Chat dropdown menu. This option helps agents reestablish a lost network connection.

**Where:** This change applies to enhanced messaging channels and Messaging for In-App and Web. [View required editions.](#)

**How:** In a messaging session, click the End Chat dropdown menu and select **Refresh**.



## Get Midconversation Summaries in Five New Languages

Conversation Catch-Up is now available in six languages: English, French, German, Spanish, Italian, and Japanese. Previously, it was available only in English.

**Where:** This change applies to all enhanced messaging channels and Messaging for In-App and Web. [View required editions.](#)

SEE ALSO:

[Salesforce Help: Show Agents and Supervisors Midconversation Summaries \(can be outdated or unavailable during release preview\)](#)

## Customize Which Queues, Flows, and Profiles Your Agents Can Transfer To

Reduce long transfer destination lists when agents just need to deliver a session to the right place quickly. Choose whether to offer all queues, flows, and profiles, or just offer some.

**Where:** This change is available to all enhanced Messaging channels and Messaging for In-App and Web. [View required editions.](#)

**How:** Go to Presence Configurations in Setup and edit the transfer destinations. Then save your changes.

SEE ALSO:

[Salesforce Help: Customize the Flows, Queues, or Profiles that Agents Can Transfer To \(can be outdated or unavailable during release preview\)](#)

## Adjust the Enhanced Conversation Component's Height in the Agent Console

You asked, we listened. Whether you find the Enhanced Conversation component to be too tall or too compact, we now give you control over its height.

**Where:** This change applies to all enhanced Messaging channels and Messaging for In-App and Web. [View required editions.](#)

**How:** In the Enhanced Conversation Component editor, enter a height between 500 and 1,000 pixels. Then save your changes.

SEE ALSO:

[Salesforce Help: Add Messaging to the Service Console \(can be outdated or unavailable during release preview\)](#)

## Track Who Ends Enhanced Messaging Sessions

A new field on enhanced messaging sessions shows whether a session was ended by the customer, the agent, a bot, or automation. Add the Ended By Type (EndedByType) field to your custom report types to get insight into enhanced messaging activity.

**Where:** This change applies to enhanced Messaging channels and Messaging for In-App and Web. [View required editions.](#)

**How:** The Ended By Type field has four possible values: End User, Agent, Bot, and System. "End User" refers to the customer. "System" can mean three things.

- After being inactive for the maximum amount of time, the status automatically updated to Ended.
- The status automatically updated to Ended due to any automation in place.
- Something went wrong and the session ended with a status of Error.

SEE ALSO:

[Salesforce Help: Report on Messaging Activity in Service Cloud \(can be outdated or unavailable during release preview\)](#)

## Activate or Deactivate Sensitive Data Rules from the Rules List View

Previously, you had to edit a rule and select or deselect the Active checkbox.

**Where:** This change applies to enhanced Messaging channels, Messaging for In-App and Web, and Voice. [View required editions.](#)

**How:** In Setup, go to the Sensitive Data Rules for Enhanced Channels page. In the list of rules, click any rule's action menu and select **Activate** or **Deactivate**. You can have up to 10 active sensitive data rules at a time for enhanced channels. If you reach this limit, you can create additional rules but can't activate them without first deactivating others.

## Einstein Conversation Mining is Now Available in Messaging for In-App and Web

Track key trends and top contact reasons with Einstein Conversation Mining. This reporting tool is now available to Messaging for In-App and Web users.

**Where:** This change applies to Messaging for In-App and Web. [View required editions.](#)

**When:** This functionality is available starting in August 2024.

SEE ALSO:

[Salesforce Release Notes: Track Key Trends and Top Contact Reasons Across More Channels](#)

## Access to Sensitive Data Rules is Restricted to Admins

To prevent users from unintentionally modifying sensitive data rules, only Salesforce admins are allowed to create, edit, activate, deactivate, and delete these rules. Users who aren't admins can only view sensitive data rules.

**Where:** This change applies to enhanced Messaging channels, Messaging for In-App and Web, and Voice. [View required editions](#)

SEE ALSO:

[Salesforce Help: Block Sensitive Data in Messaging Sessions \(can be outdated or unavailable during release preview\)](#)

## Route Data to Objects in Partner Messaging (Beta)

You can use parameters, parameter mappings, and flow variables to send partner messaging conversation data to objects. This data gives agents more context for who they're messaging with. For example, create a Support Reason dropdown menu, and then route the customer's input to the Messaging Session object.

**Where:** This change applies to Partner Messaging. [View required 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:** Setup depends on how the partner has configured the AppExchange package. Consult your partner messaging documentation for steps.


SEE ALSO:

[Salesforce Help: Route Data to Objects in Partner Messaging](#)

## Set a More Informative Channel Type in Partner Messaging (Beta)

Partners can now write their own Channel Type field value when creating an AppExchange package for Partner Messaging. Supervisors can report on Channel Type. Previously, all Partner Messaging channels had one Channel Type of Custom, making it difficult to differentiate them.

**Where:** This change applies to Partner Messaging. [View required 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:** Set the `masterLabel` field on the ConversationChannelDefinition object to the name of the channel type, such as the partner channel name.

SEE ALSO:

[Salesforce Help: Report on Messaging Activity in Service Cloud \(can be outdated or unavailable during release preview\)](#)

## Customize the Partner Messaging Channel Setup Experience Using Icons (Beta)

To help Salesforce admins select the right channel type when they set up Partner Messaging, use custom icons to uniquely identify each channel integration. Messaging partners upload the custom icon, such as a channel logo, and bundle it with the managed package. After the admin installs the package, the icon appears when they add the Messaging channel.

**Where:** This change applies to Partner Messaging. [View required 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:** Upload the custom icon as a static resource, and then set the `customIcon` field on the ConversationChannelDefinition object to the name of the static resource file.

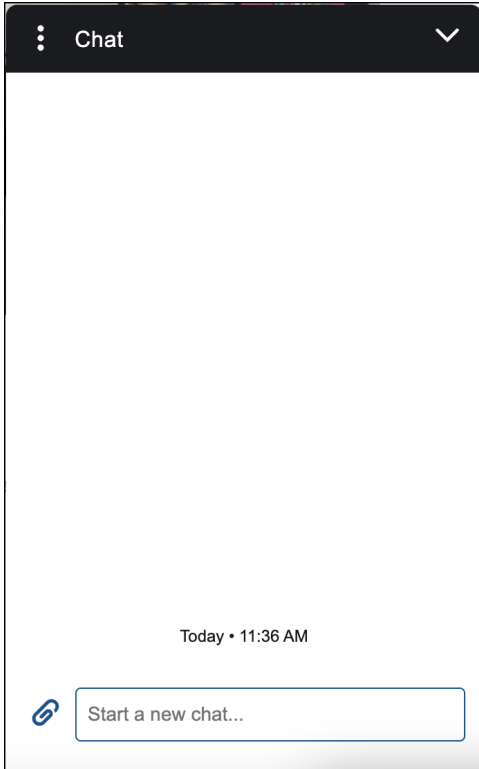
SEE ALSO:

[Partner Messaging Developer Guide: Create the Conversation Channel Definition Record \(can be outdated or unavailable during release preview\)](#)

## The Minimize Chat Window Button Is Relocated in Messaging for Web

To align with accessibility standards, the minimize chat window button appears in the messaging for web conversation window's header when it's expanded in a desktop site. Previously, the button appeared below the expanded conversation window.

**Where:** This change applies to Messaging for Web in a desktop site. [View required editions.](#)



## Messaging for Web Development

Check out the new code snippet settings to reduce noise during a session, restrict conversation history, control whether a new tab loads the web chat client minimized, and more.

### IN THIS SECTION:

#### [Reduce Noise During Messaging for Web Sessions](#)

For a simpler read through, use a code snippet setting to control whether the conversation history shows when an agent or bot joins or leaves the session. This setting affects the output in the messaging conversation window but not the transcript.

#### [Restrict Conversation History by Channel in Messaging for Web](#)

Clear an active messaging session when the user navigates to a page configured with a different Messaging channel, and fetch the conversation history of the new Messaging channel. For example, if you have different Messaging channels for unverified and verified users and you use this setting, the session clears and loads the conversation history of the verified user when the user logs in.

#### [Minimize the Web Chat Client When Loading New Tabs for Messaging for Web](#)

You can choose to open new tabs with the web chat client minimized. Previously, if you had an active messaging session and you launched a new tab from that webpage, the new tab loaded with the web chat client maximized.

#### [Place the Chat Button Where You Want for Messaging for Web](#)

To prevent the chat button from overlapping with other features on your webpage, change the minimized chat button position. The default position is the bottom-right corner.

#### [Open the Web Chat Client with the Launch Chat API for Messaging for Web](#)

The improved Launch Chat API now always maximizes the messaging conversation window when it is called. Previously, the API maximized the window the first time you called it. If you minimized the window and called the API again, the API left it minimized.

## Reduce Noise During Messaging for Web Sessions

For a simpler read through, use a code snippet setting to control whether the conversation history shows when an agent or bot joins or leaves the session. This setting affects the output in the messaging conversation window but not the transcript.

**Where:** This change applies to Messaging for Web. [View required editions.](#)

**How:** Use the code snippet setting

```
embeddedservice_bootstrap.settings.shouldShowParticipantChgEvtInConvHist.
```

SEE ALSO:

[Messaging for Web Developer Guide: Settings](#)

## Restrict Conversation History by Channel in Messaging for Web

Clear an active messaging session when the user navigates to a page configured with a different Messaging channel, and fetch the conversation history of the new Messaging channel. For example, if you have different Messaging channels for unverified and verified users and you use this setting, the session clears and loads the conversation history of the verified user when the user logs in.

**Where:** This change applies to Messaging for Web. [View required editions.](#)

**How:** Use the code snippet setting

```
embeddedservice_bootstrap.settings.restrictSessionOnMessagingChannel.
```

SEE ALSO:

[Messaging for Web Developer Guide: Settings](#)

## Minimize the Web Chat Client When Loading New Tabs for Messaging for Web

You can choose to open new tabs with the web chat client minimized. Previously, if you had an active messaging session and you launched a new tab from that webpage, the new tab loaded with the web chat client maximized.

**Where:** This change applies to Messaging for Web. [View required editions.](#)

**How:** Use the code snippet setting `embeddedservice_bootstrap.settings.shouldMinimizeWindowOnNewTab.`

SEE ALSO:

[Messaging for Web Developer Guide: Settings](#)

## Place the Chat Button Where You Want for Messaging for Web

To prevent the chat button from overlapping with other features on your webpage, change the minimized chat button position. The default position is the bottom-right corner.

**Where:** This change applies to Messaging for Web. [View required editions.](#)

**How:** Use the code snippet setting `embeddedservice_bootstrap.settings.chatButtonPosition.`

SEE ALSO:

[Messaging for Web Developer Guide: Settings](#)

## Open the Web Chat Client with the Launch Chat API for Messaging for Web

The improved Launch Chat API now always maximizes the messaging conversation window when it is called. Previously, the API maximized the window the first time you called it. If you minimized the window and called the API again, the API left the it minimized.

**Where:** This change applies to Messaging for Web. [View required editions.](#)

**How:** Use the `embeddedservice_bootstrap.utilAPI.launchChat()` API.


SEE ALSO:

[Messaging for Web Developer Guide: Utilities API](#)

## Send Automated Notifications in Partner Messaging Channels (Beta)

Automate customer updates with messaging components and the Send Conversation Messages action. Previously, you could send automated notifications only in standard and enhanced Messaging channels.

**Where:** This change applies to Partner Messaging. Automated notifications based on the Send Conversation Messages invocable action aren't supported in Messaging for Web. [View required 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 set up automated notifications in Partner Messaging, create a Notification messaging component in Setup. Then, create a flow that uses the Send Conversation Messages action to send the messaging component.

The screenshot shows the Salesforce Flow Builder interface for a flow named "Send Notification Message - V1". The flow is composed of four steps: "Autolaunched Flow Start", "Assign MEUs Assignment", "Send Notification Action", and "End". The "Send Notification Action" step is selected, and the configuration panel for "Edit Send Conversation Messages" is open on the right. The configuration panel includes the following sections:

- Select Who Receives the Message:** A field for "Messaging Users" containing the value "{IMEUs}".
- Select a Messaging Component:** A search bar and a table of messaging components. The table has columns for "Name", "Message Type", and "Description". The selected component is "Another Notification ...".
- Select When to Send the Message:** A dropdown menu for "Message Timing" set to "Any Time".
- Select Your Consent Preferences:** Radio buttons for "Apply Messaging channel consent preferences?", with "Yes" selected.

SEE ALSO:

[Salesforce Help: Send Automated Messages in Enhanced Messaging Channels \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Flow Core Actions: Send Conversation Messages \(can be outdated or unavailable during release preview\)](#)

## Bring Your Own Channel for Messaging (Generally Available)

Connect your preferred messaging service to Salesforce with Bring Your Own Channel. Use the features you love from your external messaging service while maintaining a consistent agent and supervisor experience within Salesforce. This feature, which is now generally available, was previously called Partner Messaging.

**Where:** This feature is available in Enterprise, Unlimited, and Developer editions for Service Cloud or Sales Cloud with the Digital Engagement add-on license.

**How:** Download a managed package from the App Exchange, or build your own integration. In Setup, go to Messaging Settings, and follow the steps to add a channel of the Bring Your Own Channel type. Set up an Omni-Channel Flow for routing.

SEE ALSO:

[Salesforce Help: Bring Your Own Channel](#)

[Developer Guide: Bring Your Own Channel](#)

## Voice

Reduce customer wait time by actively managing your contact center queue backlog. Get midconversation summaries for Voice in five more languages. Protect sensitive data by masking customer phone numbers.

### IN THIS SECTION:

#### [Reassign Agents to Queues on the Fly](#)

Reduce customer wait time by actively managing your contact center queue backlog. When the Queue Management feature is enabled, a supervisor can reassign idle agents to busy queues. For example, if a queue gets swamped with calls and agents are running at capacity, a supervisor can reassign a group of agents from another queue.

#### [Get Midconversation Summaries for Voice in Five More Languages](#)

Conversation Catch-Up is now available in six languages: English, French, German, Italian, Japanese, and Spanish. Previously, it was available only in English.

#### [Protect Sensitive Data by Masking Customer Phone Numbers](#)

Keep customer phone numbers confidential by enabling phone number masking from the Contact Center Setup page. With this feature enabled, all phone numbers appear in Omni-Channel views, call recordings, and transcripts as "Masked Number." The only phone numbers that aren't masked are ones used in agent-to-agent calls managed by partner telephony providers.

#### [Identify and Backfill Missing Call Transcripts in Bulk](#)

Generate a list of voice calls that are missing transcripts, and then recover and upload transcripts in bulk. Lambda errors, Amazon Contact flow misconfiguration, and telephony system or Service Cloud Real Time downtime can result in calls missing critical transcription data. Identify and proactively fix these gaps with insights from new custom report options and a new contactDataSync Lambda function.

#### [Take Calls from Preferred Audio Devices](#)

Configure your input and output audio devices in the Omni-Channel settings. Otherwise, the system device is set as the default speaker and microphone. This feature isn't available in the Apple Safari browser.

#### [Security Increased for Authenticating Users in Amazon Connect with SSO](#)

To increase security when you're using SSO to authenticate users in Amazon Connect from Salesforce, an Amazon contact center now supports a SAML identity certificate with an unlimited size. Previously, it supported up to 2,048-bit certificates.

#### [Resolve Common Status Conflicts Between Omni-Channel and Amazon Connect](#)

Enable the new agent status, `sfdc_pending`, to set in Amazon Connect when Omni-Channel is processing an agent work record. Otherwise, Amazon Connect can mark the agent as available before the record finishes processing. For example, if an agent receives a call but the customer hangs up before the agent can accept it, the Amazon Connect status is marked as `sfdc_pending`.

#### [Toggle Between Callers and Put Other Agents on Hold in Multi-Party Calls](#)

The Swap and Hold buttons are now available to agents on multi-party calls. This allows agents to toggle between calls with one click and put other agents on hold.

#### [Troubleshoot Failures During Amazon Contact Center Creation](#)

To help you resolve failures quickly, we now provide more informative error messages. No need to contact Salesforce Customer Support. For example, the enhanced messages specify the root cause of the problem, such as an AWS account issue.

#### [Customize When to the Apply Sales Engagement Automatic Task Creation Feature](#)

Optimize agents' workflows by defining when outgoing calls generate associated tasks. To prevent the Sales Engagement automatic task creation feature from generating tasks from Voice calls, disable automatic task creation from the Contact Center Setup page. This action allows tasks to continue being auto-generated from calls initiated from Sales Engagements, To Do List, and Work Queue.



### [Use an Apex-Defined Variable for All Intelligence Signal Types \(Release Update\)](#)

This release update adds a new intelligenceSignals flow input parameter that contains detected conversation intelligence signals. Use this Apex-defined input parameter for your Recommendation Strategy and autolaunched flows linked to a Conversation Intelligence rule. This update is available starting in Summer '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 in Spring '24.

### [Show an Accurate Call-Recording State in Omni-Channel](#)

Set a callRecordingDisabled contact attribute in an Amazon Connect flow to accurately reflect when voice call recording is disabled in the Omni-Channel widget. Previously, if you used an Amazon Connect flow with call recording off, the Omni-Channel widget falsely indicated to agents that the call was being recorded.

### [Control the Enhanced Conversation Component's Height in the Voice Call Record Page](#)

You asked, we listened. Whether you find the Enhanced Conversation component to be too tall or too compact, we now give you control over its height.

### [Disable CTR Sync for Voice Call Records](#)

To stop synchronizing data between an Amazon Connect contact trace record (CTR) and a Salesforce VoiceCall record, disable CTR sync. For example, disable CTR sync during a phased rollout if you don't want calls that are made directly through the Amazon Connect Contact Center Panel (CCP) to create voice call records in Salesforce.

### [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. Summer '24 includes Contact Center version 15.0. To test the updates before they go live in production, deploy them to your sandbox.




### [Account for Latency Between Omni-Channel and Amazon Connect when Rerouting Calls](#)


Mark agents as offline if, and only if, they fail to answer an incoming call within the set time limit. Agents can be marked offline in this scenario even if latency on Amazon's part results in agents having less than the Amazon-imposed 20 seconds to answer a call before it's rerouted. When an agent opens the Voice Call tab and finds that the call they meant to answer was already rerouted, it doesn't count as the agent failing to answer the call.

## Reassign Agents to Queues on the Fly

Reduce customer wait time by actively managing your contact center queue backlog. When the Queue Management feature is enabled, a supervisor can reassign idle agents to busy queues. For example, if a queue gets swamped with calls and agents are running at capacity, a supervisor can reassign a group of agents from another queue.

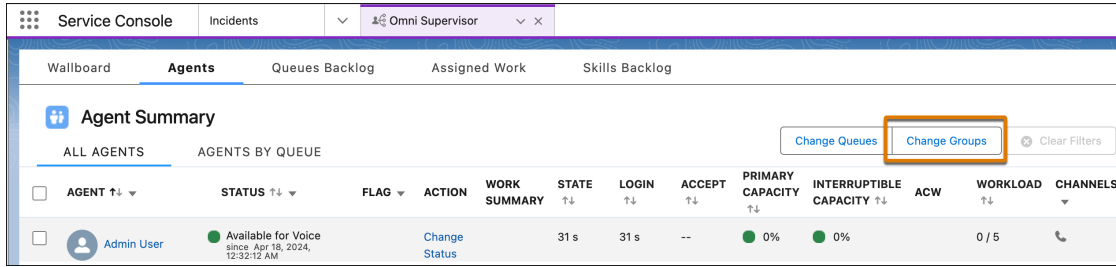
**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions. Available in Salesforce orgs with these [telephony models](#).

Service Cloud Voice with Amazon Connect	Service Cloud Voice with Partner Telephony from Amazon Connect	Service Cloud Voice with Partner Telephony
		

 **Note:** This feature requires Queue Management to be enabled. Queue Management isn't available to partner telephony providers that don't support the concept of groups.

All models of Service Cloud Voice are available as an add-on license in Service and Sales Clouds.

**How:** In the Agents tab of Omni Supervisor, select the agents, click **Change Groups**, and add them to a group associated with the new queue.



SEE ALSO:

[Salesforce Help: Manage Contact Center Queues in Salesforce and Your Telephony Provider Using Groups \(can be outdated or unavailable during release preview\)](#)

### Get Midconversation Summaries for Voice in Five More Languages

Conversation Catch-Up is now available in six languages: English, French, German, Italian, Japanese, and Spanish. Previously, it was available only in English.

**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	Service Cloud Voice with Partner Telephony
✔	✔	✔

All models of Service Cloud Voice are available as an add-on license in Service and Sales Clouds. To purchase the Einstein for Service add-on, contact your Salesforce Account Executive.

SEE ALSO:

[Catch Up with Midconversation Summaries in Five More Languages](#)

[Salesforce Help: Show Agents and Supervisors Midconversation Summaries \(can be outdated or unavailable during release preview\)](#)

### Protect Sensitive Data by Masking Customer Phone Numbers

Keep customer phone numbers confidential by enabling phone number masking from the Contact Center Setup page. With this feature enabled, all phone numbers appear in Omni-Channel views, call recordings, and transcripts as “Masked Number.” The only phone numbers that aren’t masked are ones used in agent-to-agent calls managed by partner telephony providers.

**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	Service Cloud Voice with Partner Telephony
✔	✔	✔

SEE ALSO:

[Salesforce Help: Mask Customer Phone Numbers \(can be outdated or unavailable during release preview\)](#)

## Identify and Backfill Missing Call Transcripts in Bulk

Generate a list of voice calls that are missing transcripts, and then recover and upload transcripts in bulk. Lambda errors, Amazon Contact flow misconfiguration, and telephony system or Service Cloud Real Time downtime can result in calls missing critical transcription data. Identify and proactively fix these gaps with insights from new custom report options and a new contactDataSync Lambda function.

**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	Service Cloud Voice with Partner Telephony
✔	✔	✗

All models of Service Cloud Voice are available as an add-on license in Service and Sales Clouds.

**How:** Create a custom report type that includes Voice objects: Voice Channel Interaction Event and Voice Channel Interaction Detail Event. To identify inbound and outbound calls without transcripts, create a report with this type, and filter the Source Type for Transcript Not Found.

Report: Missing Transcripts				
<b>Missing Transcripts Report</b>				
Total Records				
<b>69</b>				
	Source Type	Name	Vendor Call Key	Name
1	Transcript Not Found	VCIE-000000279	dff6e8e-62bc-4604-bce4-874f3f69db1d	VCID-000000291
2	Transcript Not Found	VCIE-000000310	69561861-f873-4e55-8790-c9c1dbad8768	VCID-000000322
3	Transcript Not Found	VCIE-000000167	eafa259c-5bf5-43cb-97fd-232f3b0d9327	VCID-000000181
4	Transcript Not Found	VCIE-000000301	44a81c53-fefe-4af0-99d4-f8d56536a94a	VCID-000000313

To backfill up to 100 transcripts at a time, manually run the contactDataSync Lambda function with your list of voice calls that are missing transcripts. This Lambda works with Contact Lens for Amazon Connect transcripts only and calls Connect REST API.

SEE ALSO:

[Salesforce Help: Check Voice Channel Performance \(can be outdated or unavailable during release preview\)](#)




[Service Cloud Voice Implementation Guide: ContactDataSync Lambda Function](#)

[Service Cloud Voice Implementation Guide: Upload or Update Transcripts with Connect REST API](#)

## Take Calls from Preferred Audio Devices

Configure your input and output audio devices in the Omni-Channel settings. Otherwise, the system device is set as the default speaker and microphone. This feature isn't available in the Apple Safari browser.

**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	Service Cloud Voice with Partner Telephony
		




SEE ALSO:

[Salesforce Help: Use the Omni-Channel Component to Work with Customers \(can be outdated or unavailable during release preview\)](#)

## Security Increased for Authenticating Users in Amazon Connect with SSO

To increase security when you're using SSO to authenticate users in Amazon Connect from Salesforce, an Amazon contact center now supports a SAML identity certificate with an unlimited size. Previously, it supported up to 2,048-bit certificates.

**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	Service Cloud Voice with Partner Telephony
		

All models of Service Cloud Voice are available as an add-on license in Service and Sales Clouds.




SEE ALSO:

[Salesforce Help: Manage Contact Center Certificates \(can be outdated or unavailable during release preview\)](#)

## Resolve Common Status Conflicts Between Omni-Channel and Amazon Connect

Enable the new agent status, sfdc\_pending, to set in Amazon Connect when Omni-Channel is processing an agent work record. Otherwise, Amazon Connect can mark the agent as available before the record finishes processing. For example, if an agent receives a call but the customer hangs up before the agent can accept it, the Amazon Connect status is marked as sfdc\_pending.

**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	Service Cloud Voice with Partner Telephony
		

**How:** Configure Amazon Connect to recognize `sfdc_pending` as an allowed agent status, either manually through Amazon Connect or by updating the Contact Center to Version 15, which adds `sfdc_pending` as an allowed agent status automatically. Then, select the associated checkbox while configuring the Contact Center through the Amazon Contact Centers Setup page.




SEE ALSO:

[Salesforce Help: Resolve Common Status Conflicts \(can be outdated or unavailable during release preview\)](#)

## Toggle Between Callers and Put Other Agents on Hold in Multi-Party Calls

The Swap and Hold buttons are now available to agents on multi-party calls. This allows agents to toggle between calls with one click and put other agents on hold.

**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	Service Cloud Voice with Partner Telephony
		




SEE ALSO:

[Salesforce Help: Add Callers or Transfer Calls \(can be outdated or unavailable during release preview\)](#)

## Troubleshoot Failures During Amazon Contact Center Creation

To help you resolve failures quickly, we now provide more informative error messages. No need to contact Salesforce Customer Support. For example, the enhanced messages specify the root cause of the problem, such as an AWS account issue.

**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	Service Cloud Voice with Partner Telephony
		

All models of Service Cloud Voice are available as an add-on license in Service and Sales Clouds.




SEE ALSO:

[Salesforce Help: Troubleshoot Service Cloud Voice \(can be outdated or unavailable during release preview\)](#)

## Customize When to the Apply Sales Engagement Automatic Task Creation Feature

Optimize agents' workflows by defining when outgoing calls generate associated tasks. To prevent the Sales Engagement automatic task creation feature from generating tasks from Voice calls, disable automatic task creation from the Contact Center Setup page. This action allows tasks to continue being auto-generated from calls initiated from Sales Engagements, To Do List, and Work Queue.

**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	Service Cloud Voice with Partner Telephony
		




SEE ALSO:

[Salesforce Help: Customize Automatic Task Creation \(can be outdated or unavailable during release preview\)](#)

## Use an Apex-Defined Variable for All Intelligence Signal Types (Release Update)

This release update adds a new intelligenceSignals flow input parameter that contains detected conversation intelligence signals. Use this Apex-defined input parameter for your Recommendation Strategy and autolaunched flows linked to a Conversation Intelligence rule. This update is available starting in Summer '24.

**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	Service Cloud Voice with Partner Telephony
		

All models of Service Cloud Voice are available as an add-on license in Service and Sales Clouds.

**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:** To review this update, from Setup, in the Quick Find box, enter *Release Updates*, and then select **Release Updates**. Follow the testing and activation steps for Use an Apex-Defined Variable for All Intelligence Signal Types.

Create an intelligenceSignals input variable in Flow Builder, and add the input variable to an autolaunched flow or Recommendation Strategy flow for Next Best Action.

### New Resource

**Resource Type**  
Variable

**API Name**  
intelligenceSignals

Description

**Data Type**  
Apex-Defined  Allow multiple values (collection)

**Apex Class**  
EnhancedChannel\_\_IntelligenceSignals

**Availability Outside the Flow**  
 Available for input  
 Available for output

SEE ALSO:

[Salesforce Help: Set Up an Autolaunched Flow \(can be outdated or unavailable during release preview\)](#)




[Salesforce Help: Create the Recommendation Strategy Flow for Next Best Action \(can be outdated or unavailable during release preview\)](#)

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

## 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. This update is available starting in Spring '24.

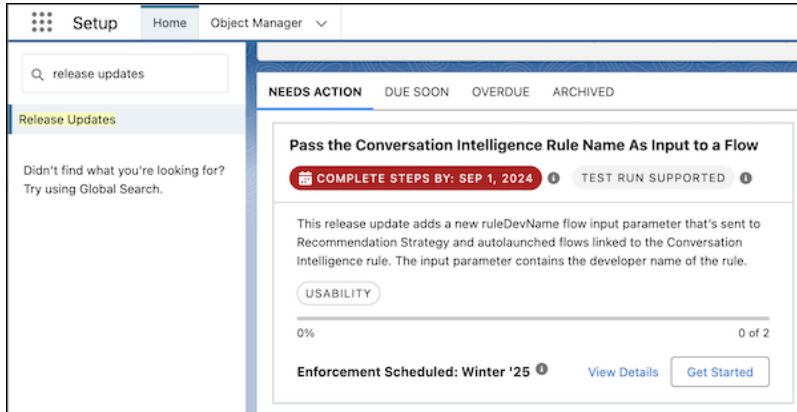
**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions. Available in Salesforce orgs with these [telephony models](#).

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**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 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.

 A screenshot of the 'New Resource' dialog box in Salesforce. The title is 'New Resource'. The 'Resource Type' dropdown is set to 'Variable'. The 'API Name' text field contains 'ruleDevName'. The 'Description' text area contains 'Dev name of the rule.'. The 'Data Type' dropdown is set to 'Text', and the 'Allow multiple values (collection)' checkbox is unchecked. The 'Default Value' text field is empty with a search icon. Under 'Availability Outside the Flow', the 'Available for input' checkbox is checked, and the 'Available for output' checkbox is unchecked. At the bottom right, there are 'Cancel' and 'Done' buttons.

#### SEE ALSO:

[Salesforce Help: Set Up an Autolaunched Flow \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Create a Conversation Intelligence Rule to Trigger an Action \(can be outdated or unavailable during release preview\)](#)

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

## Show an Accurate Call-Recording State in Omni-Channel

Set a `callRecordingDisabled` contact attribute in an Amazon Connect flow to accurately reflect when voice call recording is disabled in the Omni-Channel widget. Previously, if you used an Amazon Connect flow with call recording off, the Omni-Channel widget falsely indicated to agents that the call was being recorded.

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✔	✔	✘

All models of Service Cloud Voice are available as an add-on license in Service and Sales Clouds.

SEE ALSO:

[Service Cloud Voice Implementation Guide: Examples of Common Use Cases](#)

## Control the Enhanced Conversation Component's Height in the Voice Call Record Page

You asked, we listened. Whether you find the Enhanced Conversation component to be too tall or too compact, we now give you control over its height.

**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	Service Cloud Voice with Partner Telephony
✔	✔	✔

All models of Service Cloud Voice are available as an add-on license in Service and Sales Clouds.

**How:** In the Enhanced Conversation Component editor, enter a height between 500 and 1,000 pixels. Then save your changes.

SEE ALSO:

[Salesforce Help: Create the Voice Call Record Page \(can be outdated or unavailable during release preview\)](#)

## Disable CTR Sync for Voice Call Records

To stop synchronizing data between an Amazon Connect contact trace record (CTR) and a Salesforce VoiceCall record, disable CTR sync. For example, disable CTR sync during a phased rollout if you don't want calls that are made directly through the Amazon Connect Contact Center Panel (CCP) to create voice call records in Salesforce.

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Service Cloud Voice with Amazon Connect	Service Cloud Voice with Partner Telephony from Amazon Connect	Service Cloud Voice with Partner Telephony
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SEE ALSO:

[Service Cloud Voice Implementation Guide: Disable CTR Sync for Voice Call Records Cases](#)

## 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. Summer '24 includes Contact Center version 15.0. To test the updates before they go live in production, deploy them to your sandbox.

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SEE ALSO:

[Knowledge Article: Service Cloud Voice Contact Center Updates](#)

## Account for Latency Between Omni-Channel and Amazon Connect when Rerouting Calls

Mark agents as offline if, and only if, they fail to answer an incoming call within the set time limit. Agents can be marked offline in this scenario even if latency on Amazon's part results in agents having less than the Amazon-imposed 20 seconds to answer a call before it's rerouted. When an agent opens the Voice Call tab and finds that the call they meant to answer was already rerouted, it doesn't count as the agent failing to answer the call.

**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	Service Cloud Voice with Partner Telephony
✔	✔	✘

**When:** This change has been backported to version 248.11

**How:** This change applies automatically whenever the Push Time-Out feature is enabled.

SEE ALSO:

[Salesforce Help: Routing Configuration Settings \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Service Cloud Voice Limits and Limitations \(can be outdated or unavailable during release preview\)](#)

## Social Media

Social Customer Service Starter Pack is retiring.

IN THIS SECTION:

[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.

IN THIS SECTION:

[Legacy Chat Is Being Retired](#)

Legacy chat is scheduled for retirement on February 14, 2026, and is in maintenance mode until then. You can continue to use chat until that date, but we recommend transitioning to Messaging for In-App and Web for modernized customer communication.

Messaging offers many of the chat features that you love plus asynchronous conversations that can be picked back up at any time.

## Legacy Chat Is Being Retired

Legacy chat is scheduled for retirement on February 14, 2026, and is in maintenance mode until then. You can continue to use chat until that date, but we recommend transitioning to Messaging for In-App and Web for modernized customer communication. Messaging offers many of the chat features that you love plus asynchronous conversations that can be picked back up at any time.

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

**How:** As of February 14, 2026, legacy chat will be removed and you can't access or use chat. To avoid service interruptions to your customers, migrate to Messaging for In-App and Web before that date.

SEE ALSO:

[Knowledge Article: Chat & Live Agent Retirement](#)

[Salesforce Help: Considerations when Replacing Chat with Messaging for In-App and Web](#)

## Channel Tools

User verification works in Messaging for In-App and Web deployments that are added to Channel Menu, and the Search Individual flow action is generally available.

IN THIS SECTION:

[The Search Individual Flow Action Is Now Generally Available](#)

The Search Individual flow action links contacts, leads, employees, or person accounts to the interaction record. It's a vital part of Individual-Object Linking. Previously, this flow action was available in beta.

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**Where:** This change applies to Lightning Experience in:

- Standard Messaging channels, enhanced Messaging channels, and Messaging for In-App and Web. [View required editions.](#)
- Service Cloud Voice channels in Enterprise and Unlimited editions.
- Email-to-Case in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

## Knowledge

Check out Unified Knowledge's general availability and other features that help simplify knowledge management.

### IN THIS SECTION:

#### [Unify Knowledge from Various Sources in Salesforce \(Generally Available\)](#)

Bring all your knowledge articles into Salesforce from third-party systems like SharePoint, Confluence, Google Drive, and websites within Salesforce. Expose Unified Knowledge across every customer touchpoint and search experience, and ground Generative AI products for Einstein for Service. This feature, now generally available, includes some changes since the last release.

#### [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 supports agent productivity specific to your business needs.

#### [Run the Lightning Knowledge Migration Tool](#)

Get the latest Knowledge features when you migrate from Knowledge Classic to Lightning Knowledge, like Einstein Article Recommendations, Einstein Search for Knowledge, Flow support, and bots. The Classic Knowledge data model retirement phase is in progress. To prepare for this retirement and take advantage of updated features, run the Lightning Knowledge Migration Tool. After running the Lightning Knowledge Migration Tool, you can still use Classic Knowledge in the Classic UI. We aren't retiring the Classic UI for Knowledge.

## Unify Knowledge from Various Sources in Salesforce (Generally Available)

Bring all your knowledge articles into Salesforce from third-party systems like SharePoint, Confluence, Google Drive, and websites within Salesforce. Expose Unified Knowledge across every customer touchpoint and search experience, and ground Generative AI products for Einstein for Service. This feature, now generally available, includes some changes since the last release.

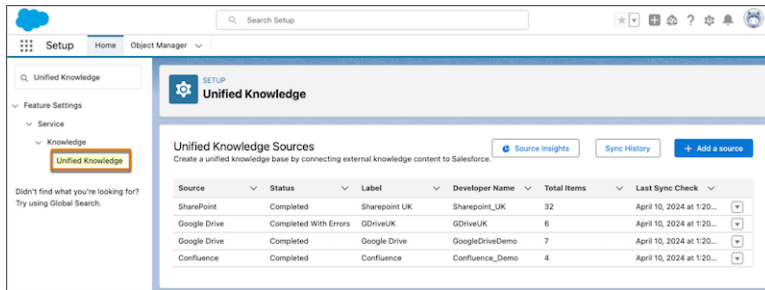
**Where:** This change applies to Lightning Experience in Unlimited Edition and other editions with the Knowledge add-on license. Salesforce has partnered with Zoomin to offer you Unified Knowledge. This feature is available as a free trial from Zoomin for 90 days, along with three connector instances to third-party knowledge sources. Upgrades from the free trial are purchased directly through Zoomin in Salesforce Setup.

**Why:** Organizational knowledge is often fragmented across multiple systems, which increases context-switching for service agents and decreases the ability to surface the right knowledge in self-service sites. Unifying your knowledge articles in Salesforce reduces fragmentation and improves the quality and accuracy of your generative AI content. With Unified Knowledge generally available:

- Use new connectors to third-party systems, such as Jira Cloud and SharePoint Server; or the new connector to Knowledge in Salesforce orgs.
- Turn on multilingual support to choose and match languages from your third-party systems to active languages in Lightning Knowledge.
- Map labels from third-party systems to Salesforce fields and data categories, and use a new picklist interface to easily map labels to fields and data categories.
- Force sync all third-party knowledge articles and label mappings into Salesforce, regardless of whether the content has changed, before the 1 to 2-hour auto-sync or the 12-hour auto-sync for sitemaps.

- Drill into the Sync History page to see which articles synced and spot errors, such as invalid credentials or invalid label mappings.
- Choose whether article links in places like list views and search results open in Salesforce or directly in third-party systems.
- Update a connector's audience, record type, or field and data category mappings and automatically apply the changes to all articles in Salesforce.
- Enter a custom user agent to index all website pages for single-page sitemaps.

**How:** From Setup, enter *Unified Knowledge* in the Quick Find box and click **Unified Knowledge**.



SEE ALSO:

[Salesforce Help: Unify Knowledge from Various Sources \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Set Up Unified Knowledge \(can be outdated or unavailable during release preview\)](#)

[Trailhead: Unified Knowledge: Quick Look](#)

[Blog Post: 10 Ways To Prep Your Knowledge Base for AI Grounding](#)

## 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 supports agent productivity specific to your business needs.

**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.

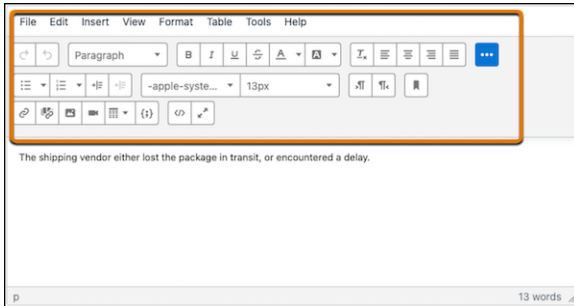
**Why:** With the Lightning Article Editor, you can:

- 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 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.

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 must 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 \(can be outdated or unavailable during release preview\)](#)

## Run the Lightning Knowledge Migration Tool

Get the latest Knowledge features when you migrate from Knowledge Classic to Lightning Knowledge, like Einstein Article Recommendations, Einstein Search for Knowledge, Flow support, and bots. The Classic Knowledge data model retirement phase is in progress. To prepare for this retirement and take advantage of updated features, run the Lightning Knowledge Migration Tool. After running the Lightning Knowledge Migration Tool, you can still use Classic Knowledge in the Classic UI. We aren't retiring the Classic UI for Knowledge.

**When:** Salesforce enforces this update on June 1, 2025.

**Who:** This change applies to all Salesforce customers using Classic Knowledge.

**Why:** The Classic Knowledge data model is no longer available starting with Summer '25. Recent updates and features replace and improve the Classic data model. After you run the Lightning Knowledge Migration Tool, you can take advantage of these Knowledge improvements. You can still use Lightning Knowledge in Salesforce Classic, even after the update.

**How:** Run the Lightning Knowledge Migration Tool before the deadline to migrate to the Lightning Knowledge data model. [Learn How to Migrate in Help](#)

After the migration tool is run, Lightning Knowledge works in these ways in Salesforce Classic.

- Because Lightning Knowledge uses record types instead of article types, you can no longer filter by article type.
- You can't set a default record type in Salesforce Classic.
- Some actions, such as Change Record Type, aren't available from the knowledge article record page in Salesforce Classic.
- Picklist values assigned to one record type in Knowledge aren't visible on records in Salesforce Classic.
- If you have custom solutions for your Classic Knowledge implementation, such as Visualforce components or pages, refactoring them to work with the Lightning Knowledge data model is sometimes required. Especially if your custom solution relies on article

types, refactor it to work with record types. Use a sandbox to test your custom solutions before running the migration tool in production.

SEE ALSO:

[Trailhead: Lightning Knowledge Migration](#)

[Salesforce Help: Custom Lightning Page Components \(can be outdated or unavailable during release preview\)](#)

## Routing

Omni-Channel users can now complete work from their mobile device. To avoid disconnecting calls, messaging sessions, or other work, you can choose for all agents to remain logged in to their original Omni-Channel sessions when subsequent Salesforce tabs or windows are opened.

IN THIS SECTION:

[IdeaExchange Delivered: Support Customers While on the Go with Omni-Channel for Mobile \(Beta\)](#)

Omni-Channel users can now complete work from their mobile device. With Omni Mobile, they can set their status and handle work requests from all enhanced channels, with the exception of Voice. They also receive notifications on their mobile device about new work, updates to work, and changes to their status. Omni Mobile is part of the Salesforce mobile app. We delivered this feature thanks to your ideas on IdeaExchange.

[Stay Logged In to Omni-Channel When Using Multiple Tabs](#)

To improve the agent experience when they open multiple tabs and browsers, a third new Omni-Channel login option is available. Now, with the Remained logged in to Omni-Channel in previous console option, the agent no longer has to decide which Omni-Channel session to keep. The agent remains logged in to the original Omni-Channel session and will be offline for any sessions created when they open additional tabs or browsers. Also, when an agent refreshes the Omni-Channel page, they now remain logged in to the same session, keeping all in-progress work open.

[Route Orchestration Work Items with Omni-Channel](#)

Now use Omni-Channel to route orchestration work items to assigned users.

[Pause Messaging Sessions with Omni-Channel Status-Based Capacity \(Beta\)](#)

With this release, status-based capacity works with Enhanced Messaging, so you can take advantage of Enhanced Omni-Channel's paused work feature. Pause messaging sessions and keep track of inactive sessions. When a messaging session goes inactive, there's no need to use flows to set ownership or provide a notification when it becomes active again.

[Enhance Routing with Omni-Channel for Government Cloud Plus](#)

If your Government Cloud Plus org runs on Hyperforce, leverage Enhanced Omni-Channel to route work, including cases, leads, and Messaging for In-App and Web sessions, and take advantage of future Omni-Channel developments.

[Keep Routing Work During Service Degradation](#)

Keep your contact center running if the Omni-Channel routing service becomes unavailable. With Fallback Mode enabled, externally routed work continues to be delivered to agents. For example, your telephony provider continues to route voice calls. Fallback Mode supports Enhanced Omni-Channel only.



## Support Customers While on the Go with Omni-Channel for Mobile (Beta)

Omni-Channel users can now complete work from their mobile device. With Omni Mobile, they can set their status and handle work requests from all enhanced channels, with the exception of Voice. They also receive notifications on their mobile device about new work, updates to work, and changes to their status. Omni Mobile is part of the Salesforce mobile app. We delivered this feature thanks to your ideas on IdeaExchange.

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



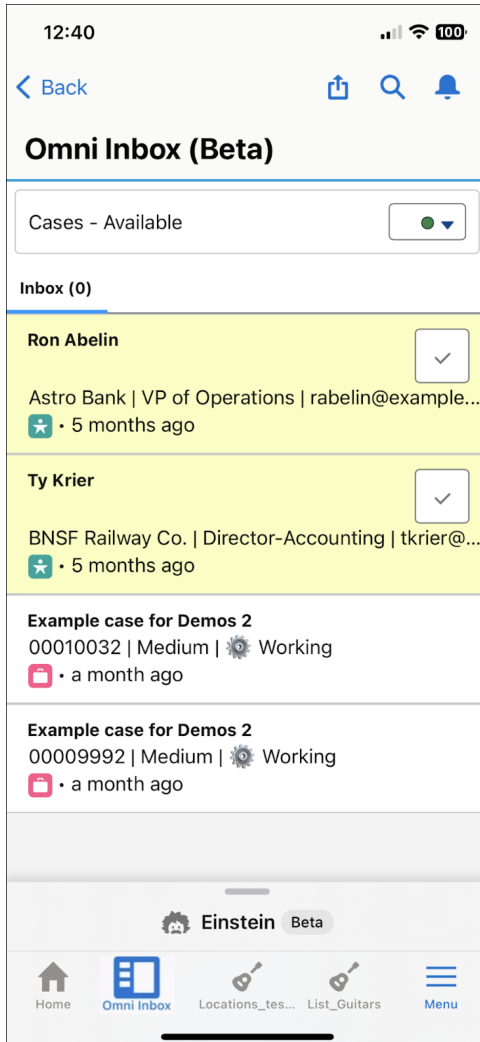
**Note:** This feature is a Beta Service. Customer may opt to try such Beta Service in its sole discretion. Any use of the Beta Service is subject to the applicable Beta Services Terms provided at Agreements and Terms.

**When:**

This feature is available after June 15, 2024.

**How:** To enable a user to access Omni Mobile from the Salesforce mobile app, assign them the Digital Engagement license, verify that Omni Inbox is set to Default On in their user profile, and add Omni Inbox to the app. Then ask the user to download the Salesforce mobile app.





## SEE ALSO:

[Salesforce Help: Go Mobile with Omni-Channel \(Beta\) \(can be outdated or unavailable during release preview\)](#)

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

## Stay Logged In to Omni-Channel When Using Multiple Tabs

To improve the agent experience when they open multiple tabs and browsers, a third new Omni-Channel login option is available. Now, with the Remained logged in to Omni-Channel in previous console option, the agent no longer has to decide which Omni-Channel session to keep. The agent remains logged in to the original Omni-Channel session and will be offline for any sessions created when they open additional tabs or browsers. Also, when an agent refreshes the Omni-Channel page, they now remain logged in to the same session, keeping all in-progress work open.

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

**How:** In Omni-Channel Settings, select how you want to handle multiple sessions for the same agent.

### Omni-Channel Settings

Omni-Channel routes work items to your support agents. It sets agent capacity for accepting work and agent availability.

To access the latest Omni-Channel features, turn on enhanced routing. You can turn it on and off, but some advanced features are available only with enhanced routing. If you have standard messaging channels or any version of Chat, or use standard bots, you can't use enhanced routing and must turn it off. [Learn About Enhanced Routing in Salesforce Help](#)

Enhanced Omni-Channel Routing  On

**I = Required Information**

Enable Omni-Channel

Enable Skills-Based and Direct-to-Agent Routing

Enable Secondary Routing Priority

Enable Status-Based Capacity Model

Define login behavior when an agent using Omni-Channel opens a new window or tab

- Automatically log agents in to Omni-Channel in the new window or tab
- Warn agents in a popup that open tab-based work will be terminated
- Don't automatically log agents in to Omni-Channel on a new window or tab

Save Cancel

SEE ALSO:

[Salesforce Help: Enable Omni-Channel \(can be outdated or unavailable during release preview\)](#)

## Route Orchestration Work Items with Omni-Channel

Now use Omni-Channel to route orchestration work items to assigned users.

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


SEE ALSO:

[Use Omni-Channel Routing with Work Items](#)

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

With this release, status-based capacity works with Enhanced Messaging, so you can take advantage of Enhanced Omni-Channel's paused work feature. Pause messaging sessions and keep track of inactive sessions. When a messaging session goes inactive, there's no need to use flows to set ownership or provide a notification when it becomes active again.

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

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

SEE ALSO:

[Use Status-Based Capacity with Messaging \(Beta\)](#)

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

## Enhance Routing with Omni-Channel for Government Cloud Plus

If your Government Cloud Plus org runs on Hyperforce, leverage Enhanced Omni-Channel to route work, including cases, leads, and Messaging for In-App and Web sessions, and take advantage of future Omni-Channel developments.

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

**When:** Salesforce is migrating some of these orgs to Hyperforce between May 10, 2024 and August 23, 2024.

**How:** After your org is running on Hyperforce, to get started, enable Omni-Channel, turn on Enhanced Omni-Channel, and configure the presence statuses. To gain easy access to Omni-Channel, agents can add the Omni-Channel sidebar or widget where they work.

SEE ALSO:

[Salesforce Help: Route Work with Omni-Channel \(can be outdated or unavailable during release preview\)](#)

[Knowledge Article: Introducing Hyperforce - General Information & FAQ](#)

## Keep Routing Work During Service Degradation

Keep your contact center running if the Omni-Channel routing service becomes unavailable. With Fallback Mode enabled, externally routed work continues to be delivered to agents. For example, your telephony provider continues to route voice calls. Fallback Mode supports Enhanced Omni-Channel only.

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

**How:** To enable Fallback Mode, log a case with Salesforce Customer Support.

SEE ALSO:

[Knowledge Article: Routing Work with Omni-Channel Fallback Mode](#)

[Salesforce Help: Handling Unrouted Work When the Omni-Channel Routing Service is Unavailable \(can be outdated or unavailable during release preview\)](#)

## Feedback Management

Check out the enhanced data mapper page.

IN THIS SECTION:

[Do More with an Enhanced Data Mapper Page](#)

We redesigned the data mapper page to enhance the visual sequence of your survey data maps.

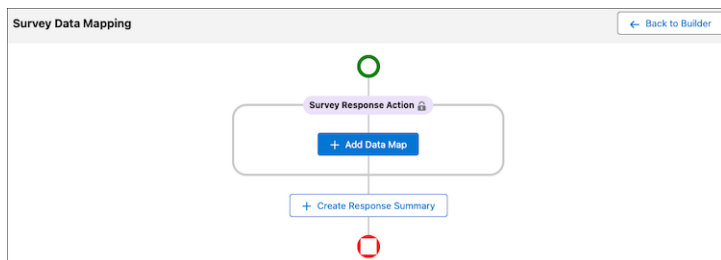
[Survey Invitations View in Contact Activity Tab Is No Longer Supported](#)

The survey invitation email view in the activity tab of contact records is no longer supported.

## Do More with an Enhanced Data Mapper Page

We redesigned the data mapper page to enhance the visual sequence of your survey data maps.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Feedback Management - Starter or Feedback Management - Growth is enabled.



SEE ALSO:

[Salesforce Help: Create Survey Data Maps to Create or Update Records \(can be outdated or unavailable during release preview\)](#)

## Survey Invitations View in Contact Activity Tab Is No Longer Supported

The survey invitation email view in the activity tab of contact records is no longer supported.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Feedback Management - Starter or Feedback Management - Growth is enabled.

## Scheduled Reminders

Check out scheduled reminders for upcoming events and occasions.

IN THIS SECTION:

[Boost Participation for Upcoming Events with Scheduled Reminders](#)

Maintain engagement and prevent users from missing upcoming occasions or responsibilities with scheduled reminders. Send timely email reminders to alert users about approaching commitments. For example, survey creators can send reminders to recipients to respond before the surveys expire. Previously, users could send reminders only for past events.

### Boost Participation for Upcoming Events with Scheduled Reminders

Maintain engagement and prevent users from missing upcoming occasions or responsibilities with scheduled reminders. Send timely email reminders to alert users about approaching commitments. For example, survey creators can send reminders to recipients to respond before the surveys expire. Previously, users could send reminders only for past events.

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

**Who:** To create scheduled reminders, users need the Industries Scheduled Reminders license and 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 before event reminder.

**New Reminder Definition**

**Configure Reminder**

\*Reminder Type: Recurring

\*Reminder Timing: Before Event

Event Date: InviteExpiryDateTime

**Define Reminder Schedule**

Frequency: Daily Weekly Monthly

Repeat Every: 2 days

Start Date: 5/9/2024

**Related To**

Related to the Target Object: Survey Invitation

**Condition**

Select a condition to send reminder\*

All Conditions Are Met (AND)

\*Resource: Response Status \*Operator: Equals \*Value: Not Started

Buttons: Back, Cancel, Next

SEE ALSO:

[Salesforce Help: Create Scheduled Reminders \(can be outdated or unavailable during release preview\)](#)

## Industries in Service Cloud

Check out Industries features for Service Cloud that enhance the service experience and assist in automating complex decisions.

IN THIS SECTION:

[Extend Your Service Cloud Implementation with Service Innovations from Industries](#)

Orchestrate every part of the service experience and provide meaningful, personalized interactions to your customers with Service Innovations, now available in Service Cloud. Service Innovations, a collection of components from Industry Cloud, can help agents quickly resolve customer cases and proactively address issues from the Service Console.

[Create Rules with Business Rules Engine](#)

Build powerful, scalable lookups and calculations that automate complex decisions by using Business Rules Engine, now available in Service Cloud. Your business users can create rules that are easy to maintain and integrate directly with Flow and third-party workflow tools using Apex or REST APIs.

## Extend Your Service Cloud Implementation with Service Innovations from Industries

Orchestrate every part of the service experience and provide meaningful, personalized interactions to your customers with Service Innovations, now available in Service Cloud. Service Innovations, a collection of components from Industry Cloud, can help agents quickly resolve customer cases and proactively address issues from the Service Console.

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

**Who:** To make the Service Innovations features available to Service Cloud, assign the Industry Service Excellence add-on license.

**How:** Add the components for Identity Verification, Audit Trail, Action Launcher, and Timeline to Service Console by using the Lightning App Builder.

SEE ALSO:

[Salesforce Help: Identity Verification](#)

[Salesforce Help: Audit Trail](#)

[Salesforce Help: Action Launcher](#)

[Salesforce Help: View Events Using Timeline in Salesforce](#)

## Create Rules with Business Rules Engine

Build powerful, scalable lookups and calculations that automate complex decisions by using Business Rules Engine, now available in Service Cloud. Your business users can create rules that are easy to maintain and integrate directly with Flow and third-party workflow tools using Apex or REST APIs.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions where Business Rules Engine is enabled.

SEE ALSO:

[Salesforce Help: Business Rules Engine](#)

[Salesforce Help: Get Started with Business Rules Engine](#)

## 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 Success Plans gives every customer access to resources, guidance, and support at every step of the journey. From building expertise and driving product adoption, to troubleshooting and maintaining technical health, we help you fast-track your success. With each release, we introduce new and better ways to help you see results from all your Salesforce products. Highlights for Summer '24 include:

- Success Plans for Tableau
  - Standard, Premier, and Signature Success Plans are now available for Tableau. Signature provides a personalized proactive partnership managed by a designated Customer Success Manager. Premier includes targeted guidance & best practices through Expert Coaching Sessions & Developer Support. Standard provides all customers with on-demand resources and documentation.
- Enhanced Signature Success Plan Experience
  - Signature customers can now collaborate with their designated Customer Success Manager, their single point of contact and advocate. They deliver proactive expertise, personalized recommendations, and engage technical resources to address in-depth

product needs. The CSM also delivers up to 4 Success Reviews a year and helps keep customers on their journey with a personalized Success Path.

- Customer Success Score Enhancements
  - Improved personalized benchmarking: Score is now based on an individual account with a new Absolute Scoring model, so customers can see progress year over year, rather than by comparing to peers
  - Aligned to industry standards: Technical Health metric trends are now aligned to ITOps standards for modern SaaS architectures
  - Expansion to more clouds. The Customer Success Score is now available for:
    - Marketing Cloud Account Engagement
    - Marketing Cloud Personalization
    - B2C Commerce Cloud
    - MuleSoft
  - Added more signals. The Customer Success Score now includes signals for:
    - Proactive Monitoring
    - More signals from Sales, Service, & Data Cloud
- Expert Coaching Digital Catalog
  - A new online digital Expert Coaching experience for all videos, webinars, and one-on-one sessions. Find and explore topics easier with built-in features, embedded search bar, and targeted content.
- Signature Success Plan for Marketing Cloud Intelligence
  - Signature Success Plan is now available for Marketing Cloud Intelligence. Signature provides a personalized proactive partnership managed by a designated Customer Success Manager, expedited issue resolution with 24/7 support, and an emergency hotline. Additional benefits include robust Key Event Management, Proactive Monitoring for maximizing uptime, and Annual Technical Health Reviews to refine data integration and system architecture. This offering is designed to reduce business disruptions, improve operational efficiency and is ideal for enhancing marketing effectiveness.

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 [Salesforce Customer Success overview page](#).

## 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. It features a search experience that aids discoverability, more informative idea records, and search-as-you-type dupe detection to help avoid posting the same idea twice. For more information, visit the [IdeaExchange](#).

## Trailhead GO

The newest release includes new widgets as well as enhancements to the Trailblazer Profile and Trailblazer Community.

- Easily access learning right from your mobile home screen by adding a Trailhead widget on iOS, MacOS, and Android devices. You can also add a see your progress anytime and get inspired to continue learning by adding a Trailblazer Ranks widget on Android devices.
- See all of the Trailblazers Stamps you've collected by attending Salesforce events in-person or on Salesforce+, and check the Future tab for upcoming eligible events. Trailblazer Stamps are highlighted on the Trailblazer Profile when you access it on mobile.
- Now, you can “upvote” answers you find most helpful in the Trailblazer Community, using the Answer Helpfulness Rating. The most widely accepted answers are most visible in your feed.

Trailhead GO is available on iPhone, iPad, and Android devices.

- Android: [Trailhead GO at Google Play](#)
- iOS: [Trailhead GO at the App Store](#)

## 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](#).